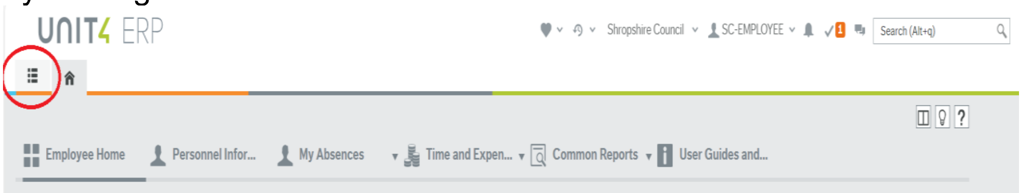
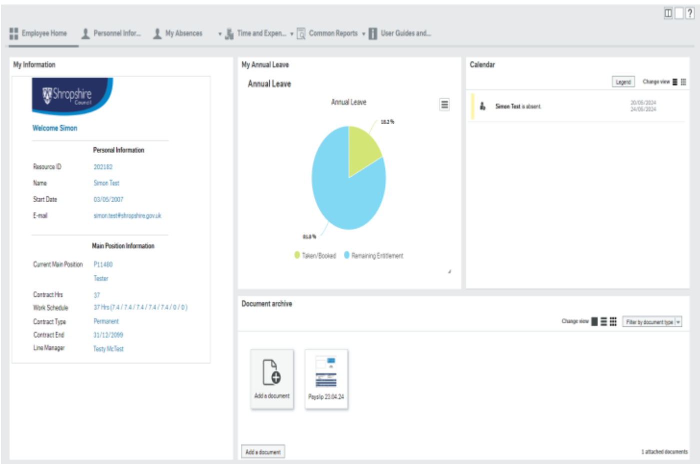
How to use the Home Employee Dashboard

<table>
<tr><td></td><td></td><td>Last Updated</td></tr>
<tr><td>1</td><td>Scope:
This guidance is to show you how to use the Home Employee Dashboard in the ERP.</td><td>10.05.2024</td></tr>
<tr><td>2</td><td>Introduction:
The Home Employee Dashboard provides the user with quick access to the most commonly used functions (payslips, requesting absences, claiming timesheets and expenses, common reports and guidance links) in the ERP.</td><td>10.05.2024</td></tr>
<tr><td>3</td><td>Navigate to:
Home Employee Dashboard</td><td>10.05.2024</td></tr>
<tr><td>4</td><td>Step by step process (with videos and screenshots)</td><td></td></tr>
<tr><td></td><td>4.1 The Home Employee Dashboard opens when the user first logs into the ERP.
The dashboard uses live data so will update every time the ERP is opened.
The Main Menu can be accessed straight away without waiting for the data to load by clicking on the Main Menu button on the left.



4.2 Employee Home
The Employee Home provides the user with a quick overview of the most used functions in the ERP.



</td><td>29.05.2024</td></tr>
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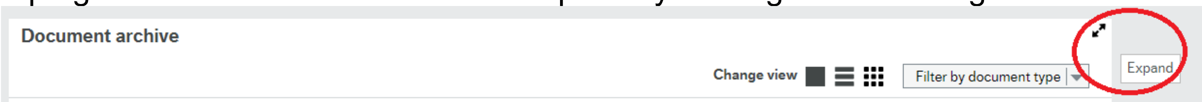
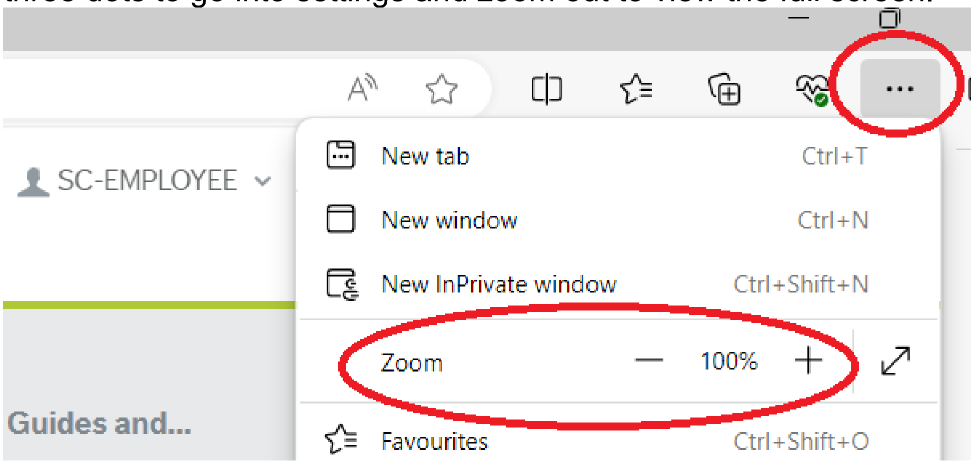
4.2.1 **Navigating**

All four sections here can be expanded to full screen by clicking on the arrows in the top right on each section and then collapsed by clicking the arrows again.

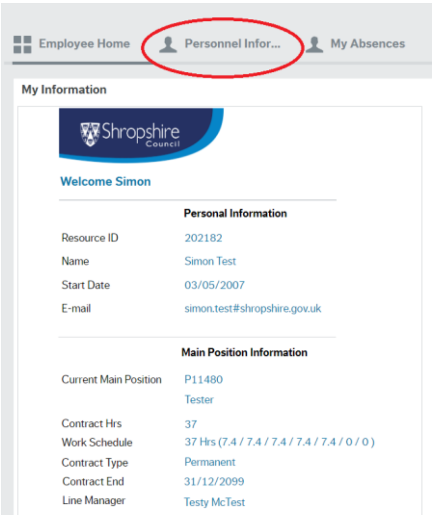


When accessing the ERP on a smaller screen (i.e. a laptop), you may need to make amendments in order to fully view your screen. In the browser toolbar, click on the three dots to go into settings and zoom out to view the full screen.



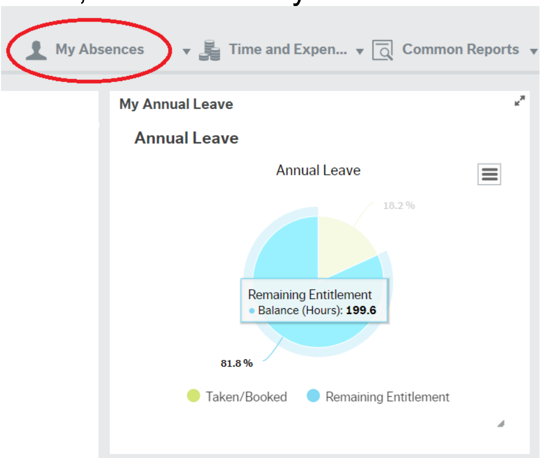
4.2.2 **My Information**

This section shows basic personal and main position information (i.e. resource ID, start date, current main position, contract hours, work schedule, line manager.) Details for any other positions can be found under Personnel Information.



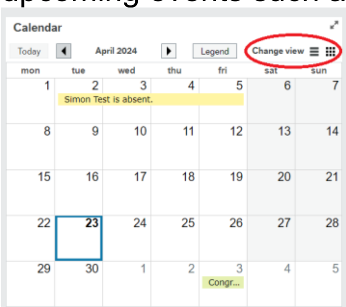
4.2.3 **My Annual Leave**

There is a pie chart showing annual leave taken/booked and remaining entitlement and gives a quick overview of leave available and what has been taken. To see more detail, click on the My Absences tab.



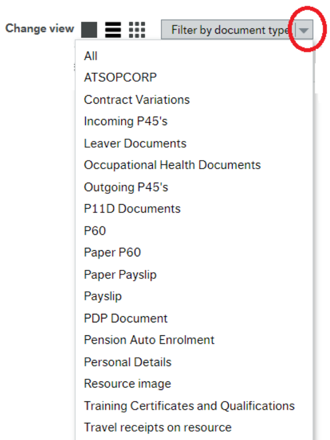
4.2.4 **Calendar**

There is a calendar where the view can be changed from List to Calendar to show upcoming events such as booked leave.

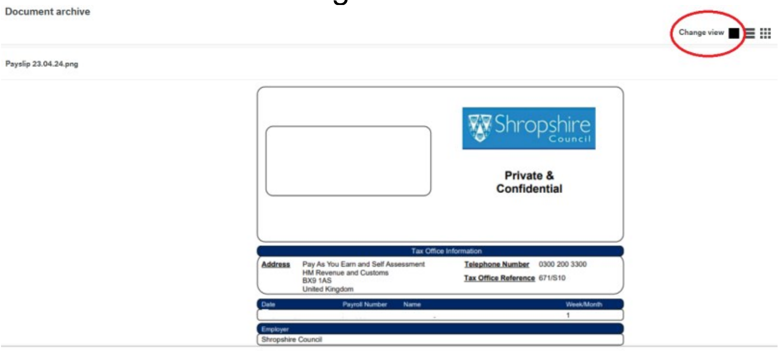


4.2.5 **Document archive**

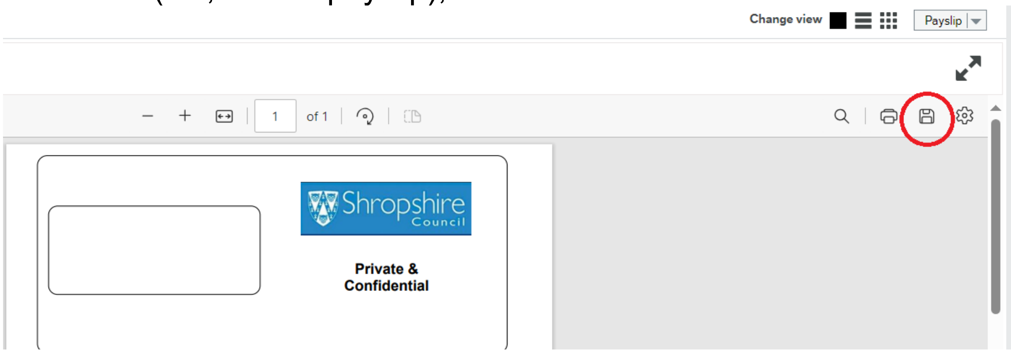
The Document archive gives direct access to payslips, P60s and other employee documents. To have a better view of a document, expand the document archive section. Click on Filter by document type to select a specific document type to narrow down the selection.



The view can be changed from Grid to List which is a list of all the documents or to Detailed to view an image of the documents.

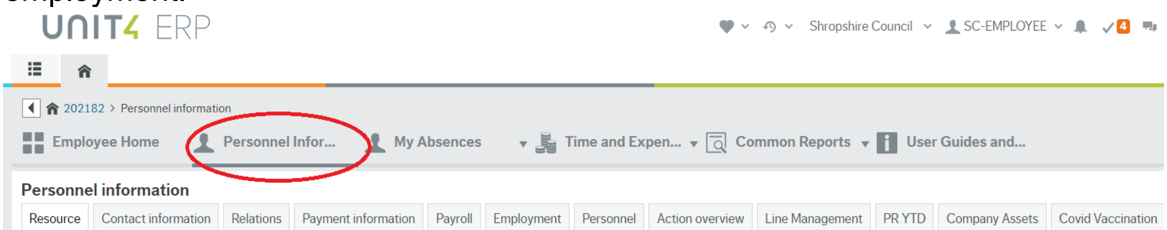


From here the document can be printed or saved. To download and save a document (i.e., P60 or payslip), click on the Save icon to save it to the device.

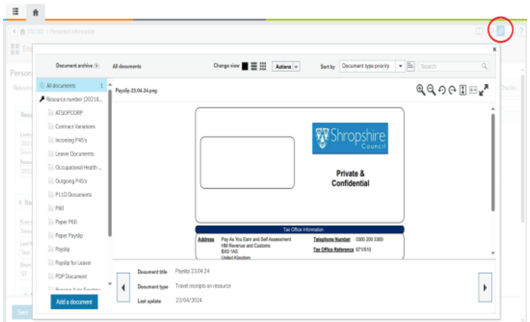


4.3 **Personnel Information**

This is a quick link to the Personnel Information section in the Main Menu under Your employment.

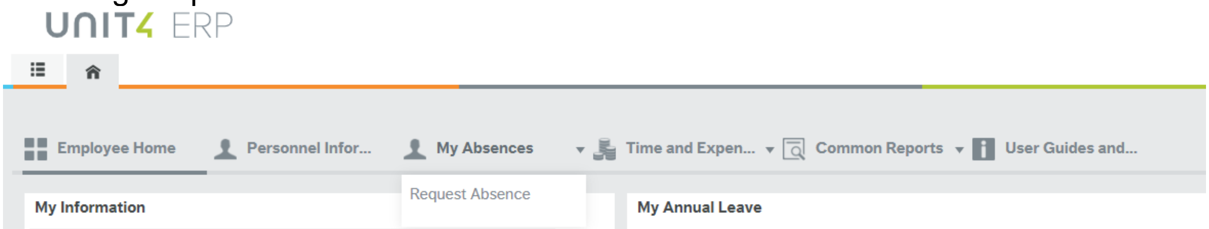


The Document archive can be viewed through the Personnel Information section by clicking on the paperclip in the top right corner and gives a clear view of the documents.

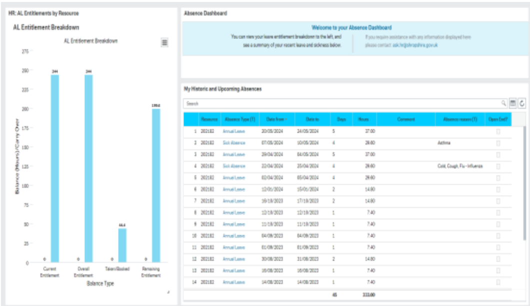


4.4 **My Absences**

This section has a quick link to requesting absences by hovering over the tab and selecting Request Absence.

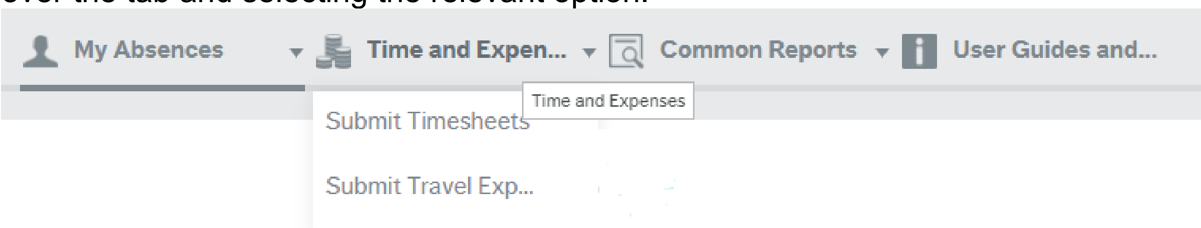


Click on the tab to view a chart of annual leave entitlement breakdown (current entitlement, overall entitlement, taken/booked and remaining entitlement) and a list of historic and upcoming absences including sickness absences shown in days and hours.

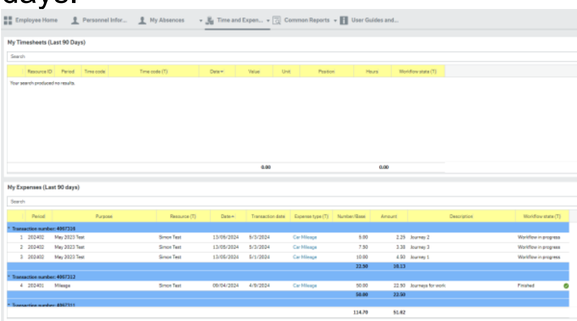


4.5 **Time and Expenses**

This section has quick links to submit timesheets and claim expenses by hovering over the tab and selecting the relevant option.

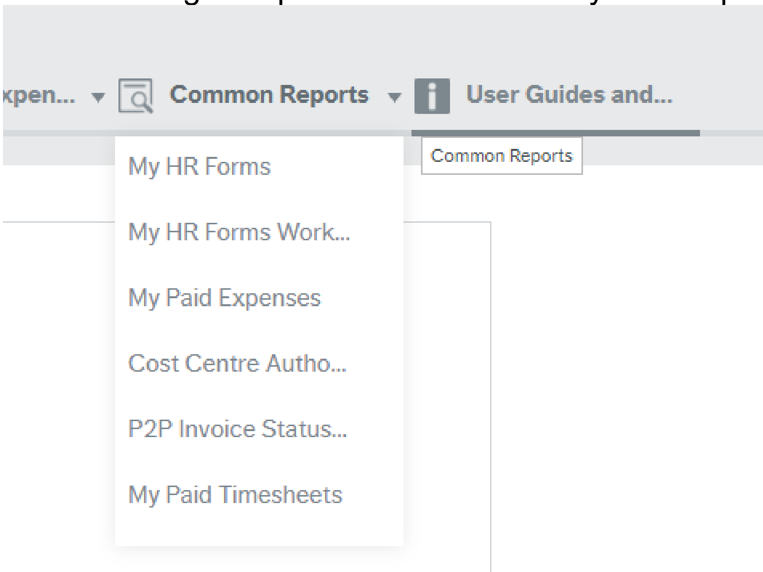


Click on the tab to view claimed timesheets and requested expenses from the last 90 days.



4.6 **Common Reports**

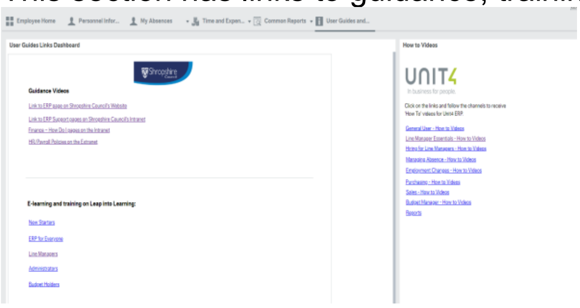
This section gives quick links to commonly used reports.



My HR Forms shows HR forms previously completed with a link back into the form to view the details.
My HR Forms Workflow Status shows where completed forms are in workflow.
My Paid Expenses shows all previously paid expense claims.
Cost Centre Authoriser Enquiry shows the authorises at each level for each cost centre.
P2P Invoice Status Enquiry shows a detailed breakdown of invoices and purchase orders.
My Paid Timesheets shows all previously paid timesheets.

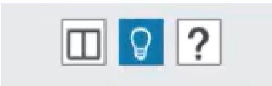
4.7 **User Guides and Supporting Info Links**

This section has links to guidance, training and "how to" videos.



4.8 **Knowly**

Remember to use the in system guidance notes (blue lightbulb in the top right) whilst in the ERP.



5	Related guidance and policies Video Links • Tour of the Home Employee Dashboard • Annual Leave – Requesting and Cancelling • How to View and Save Payslips • How to make an Expense Claim • How to complete a Timesheet • How to use Reports in the ERP • How to find and use a Knowly	17.05.2024