

This guide is for line managers (or staff with delegated responsibilities) and covers authorising holiday or absence requests, submitting holiday or absence requests on behalf of a member of your team, using the Team Planner, delegating to another member of your team, and generating reports.

The guide assumes you are already familiar with using the MyHR system as a regular member of staff. If you are not familiar with the system, see our Quick Guide for Staff for general guidance.

Visit StaffNet if you are looking for detailed guidance on [Pay](#) and [Holidays, leave and Absence](#).



Note: If staff information is incorrect, or editing required due to staffing changes or a re-organisation, please contact myhr@abdn.ac.uk to update their details.

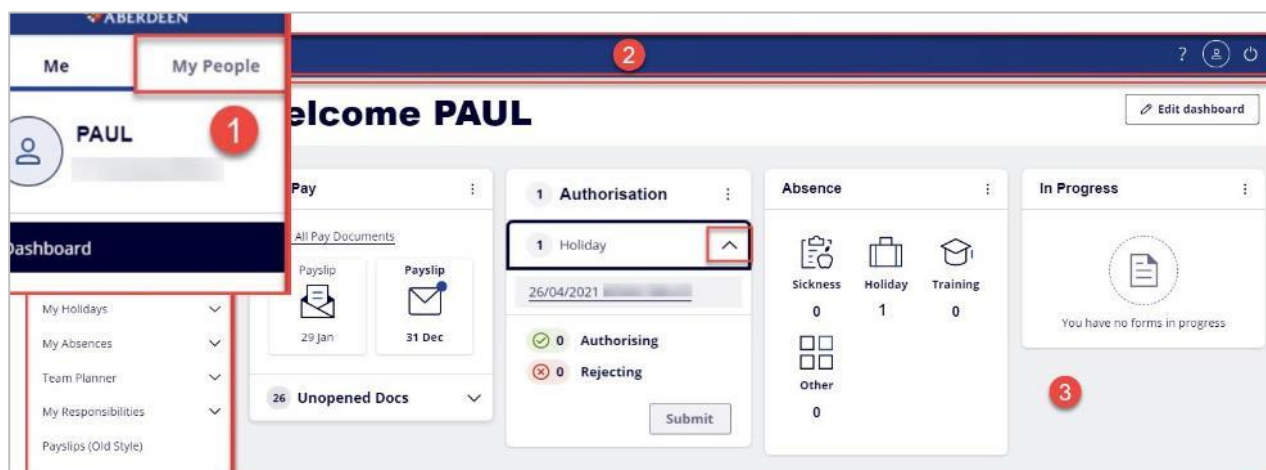
Login to MyHR

On a University networked device, open a web browser and go to www.abdn.ac.uk/myhr

- For guidance on logging in (and signing out), see our Quick Guide for Staff for general guidance

MyHR Dashboard Managers View

When you login to MyHR, you will see your personalised Welcome Dashboard.



The **Navigation Pane** on the left has two tabs: **Me** and **My People**:

- The **Me** tab is the default view and displays your personalised Welcome Dashboard.
- From here you can amend your details, request holidays and absences, and delegate responsibilities. The Dashboard also displays any requests from your team members that are awaiting your authorisation.
- The **My People** tab displays modules available to you as a Line Manager, i.e. Team Selector, Manager Reports, and Manager Forms History.

The **Title Bar**:

- The Toggle menu on the left allows you to hide/show the Navigation Pane.
- At the far right are icons to take you to **Account Details** and **Security Settings** to view and re-enter security answers and **Sign Out**.



For further guidance on your personalised Welcome Dashboard view (i.e. under the **Me** tab), see our Quick Guide for Staff.

Authorising holiday or absence requests

When a team member submits a holiday request, you will receive an email notification advising you to login to MyHR and authorise or reject the request within the next ten days. If you do not process the request, the system will send you a reminder email. If the request is still not processed, the system sends an email to your Line Manager asking them to login to MyHR and authorise or reject the request.

There are different ways you can authorise requests.

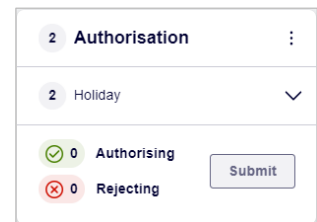
Authorise requests from the Dashboard widget

The quickest way to authorise or reject holiday requests is from the **Authorisation** widget on your Dashboard.

The **Authorisation** widget will display any authorisation requests you have, and how many there are.

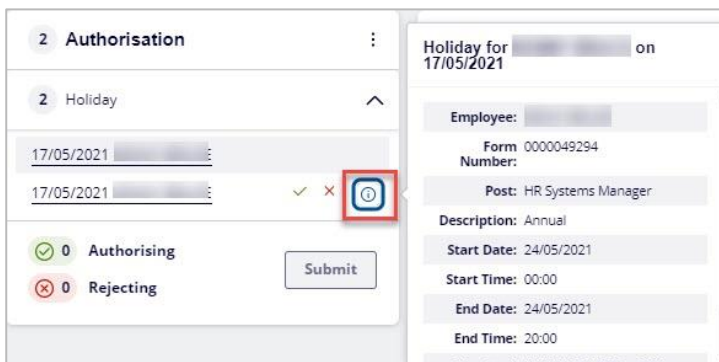
For example, the screenshot opposite shows there are a total of 2 new **Holiday** authorisation requests.

You can use the Authorisation widget in one of two ways.



Simple authorisation

1. Click on **Holiday** to expand the view, see which member of staff submitted the request, and the date on which they submitted it.
2. To view more information about the request, click on the **i** button. Click the **i** button again to hide.



3. Choose to authorise (tick) or reject (cross) the request, then click **Submit**.
4. A confirmation message will be displayed on the screen.
5. The system will send an email to the member of staff, to tell them their request has been processed.

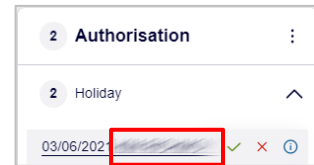
Comparative authorisation

Before authorising a member of staff's request, you may find it helpful to view it in relation to existing holiday requests from other team members – for example, to check for holiday cover over the summer.



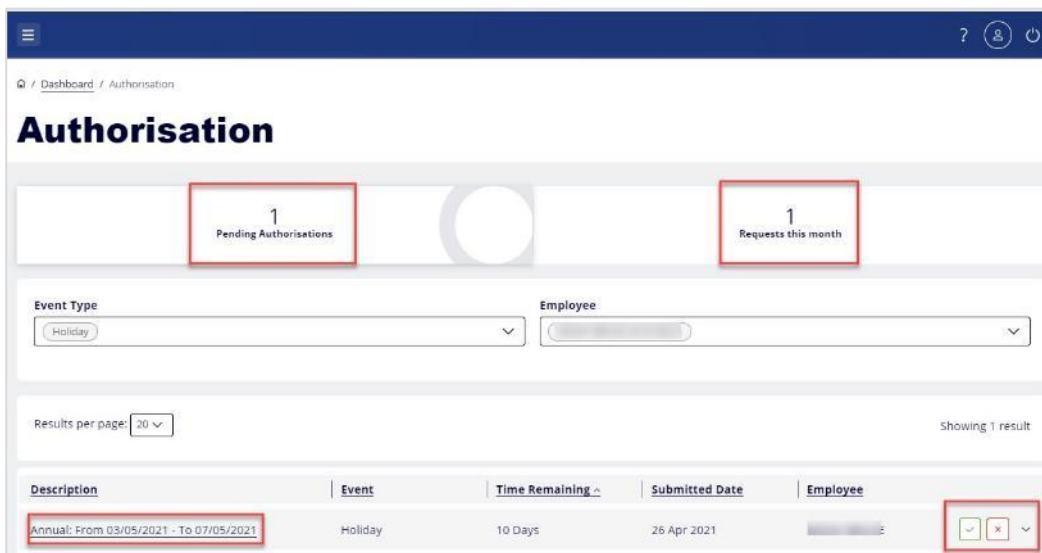
If a staff member has more than one request to authorise, this method only deals with the opened request.

1. Click on the requester's name to open the request.
2. The **Holiday Authorisation** planner opens, displaying approved holidays, sickness, and other recorded absences for *all* team members.
3. Once you have viewed the request in relation to others, and added **Authorisation/Rejection Notes** if required, click [**Authorise**] or [**Reject**] as appropriate.
4. The system will prompt you to confirm your request. Click **OK** to submit, or **Cancel**.
5. A confirmation message will be displayed on the screen.
6. The system will send an email to the member of staff to tell them their request has been processed.
7. Return to the Navigation Pane to select another service, or **Sign Out**.

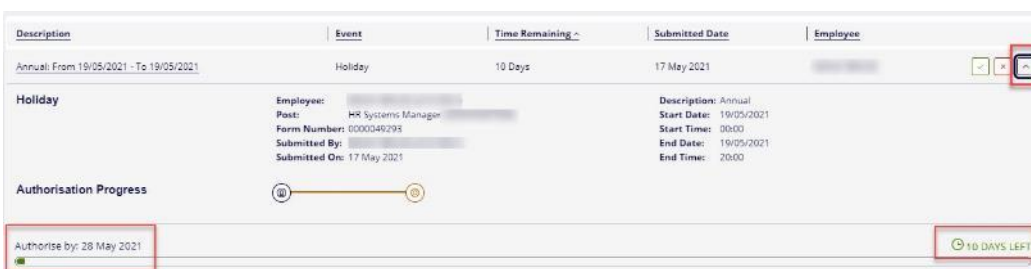


Authorise requests from My Responsibilities

1. From the **Me** tab, in the Navigation Pane, click **My Responsibilities** then **My Authorisations** to view the Authorisation screen.
2. The Authorisation screen provides a summarised overview of authorised, rejected or pending requests.



3. Click the number within the **Pending Authorisations** section of the screen to view only pending authorisation requests. These will be displayed under the **Description** heading.
4. To view more detail about a request, click the drop-down arrow to the right of it.
 - This view also displays clearly how many days you have left to authorise before the system sends you a reminder email. If you take no action, the system will send the request to your Line Manager.



- Click the up arrow to hide the detail again.
5. Choose to authorise (tick) or reject (cross) the request, then click **Submit**.

- A message will be displayed on the screen prompting you to confirm or cancel your request. Click **Confirm** to submit.



Do you want to process these authorisations/rejections?

✔ Authorising (1)
Annual: From 19/05/2021 - To 19/05/2021 Holiday

✘ Rejecting (0)

Cancel Confirm ✓

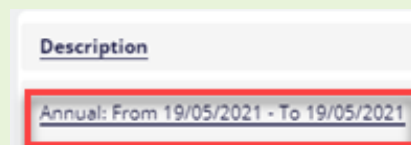
- The system will send an email to the staff member, notifying them that their request has been processed.



Before authorising a member of staff's request, you may find it helpful to view it in relation to existing holiday requests from other team members – for example, to check for holiday cover over the summer.

Click on the request **description** to open the request.

The **Holiday Authorisation** planner opens, displaying approved holidays, sickness, and other recorded absences for *all* team members.



Description

Annual: From 19/05/2021 - To 19/05/2021



Note: You will notice that the **Entitlement (Days)** section on all Holiday planners within the system is blank. This is because MyHR does not currently calculate holiday entitlement.

Request a holiday on behalf of a team member

If it is not possible for a member of your team to access MyHR and submit a holiday request, you can submit the request on their behalf.

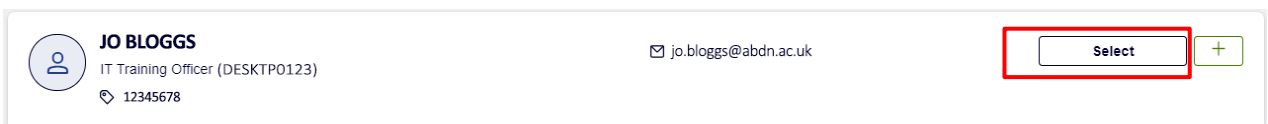


Note: When you submit a holiday request on behalf of a team member, it is automatically authorised. Email notification is also sent to you, as Line Manager. Please make sure you forward this notification to your team member for their records.

- From the **My People** tab, click on **Team Selector** in the Navigation Pane.
- Enter the team member's last name in the **Search by team member name** search box and click the search icon.
- Click **Select** to the right of the team member's name.



Me My People



JO BLOGGS
IT Training Officer (DESKTP0123)
12345678

jo.bloggs@abdn.ac.uk

Select +

– The Navigation Pane beneath the My People tab changes to reflect the team member you selected.

- From the Navigation Pane, click **Holiday**.
- Click **[Request Holiday]** at the bottom right of the Holiday Summary screen.
- Next to **Type***, click the drop-down and select **Annual**.
- Select the duration. The default is **Single Day**. To select a single day or a half day:
 - Click **Calendar** alongside the **Single Day Date*** field and select the required date.
 - Select **Full Day**, or **AM Only** or **PM Only**, as required.
- To select multiple days, first select the **Date Range** radio button. Then, depending on the duration:

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- Click **Calendar** alongside the **Date Range From – Date*** field and select the start date. Select **Full Day** or **PM Only**, as required.
 - Click **Calendar** alongside the **Date Range To – Date*** field and select end date from date. Select **Full Day** or **AM Only**, as required.
9. Add a **Reason for Request** if required.
 10. Check the holiday dates and click **[Submit]**.
 11. The system will prompt you to confirm your request. Click **OK** to submit, or **Cancel**.
 - Once you have clicked **OK**, the system will display a confirmation of the request. After a few seconds, you will see the **Holiday Summary**, showing details of holidays taken by that team member, along with sickness days (once processed by the monthly Payroll) and other absence records.
 12. If you need to submit another holiday request on behalf of your team member, click on **[Request Holiday]** at the bottom right of the screen.
 13. Return to the Navigation Pane to select another service, or **Sign Out**.

Record an absence on behalf of a team member

It is also possible to create an absence record on behalf of a team member. First, select the team member – follow steps 1-3 under **Request a holiday on behalf of a team member**, above.

1. From the Navigation Pane, click **Absence**.
2. Click **[Create]** at the bottom right of the Absences screen.
3. From the drop-down **Type** menu, select **Absence**.
4. Click **Calendar** beside the **Start Date** and select from date picker.
5. Click **Calendar** beside the **End Date** and select from date picker.
6. Click **[Next]**.
7. In the **Enter Absence Details** form, add a **Start Time** and **End Time** in 24 Hour format.



Note: By default, the Start Time will be set to 00:00 and the EndTime to 20:00. It is important to change these.

8. Click on **Absence Type** drop-down and select **Out of Office**.
9. Select the **Reason** for your absence from the drop-down list.
10. Enter more information in the **Additional Details** field, if required.
11. Check details and click **[Submit]**.



Clicking the **[Save]** button only *saves* your request. It does not submit it for processing.

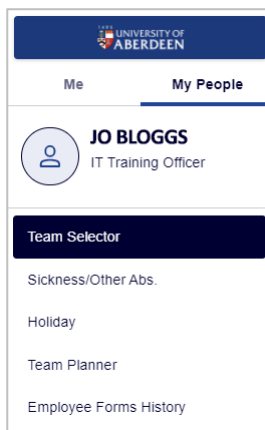
12. The system will display a confirmation of your request.
 13. Return to the Navigation Pane to select another service, or **Sign Out**.
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Team Selector

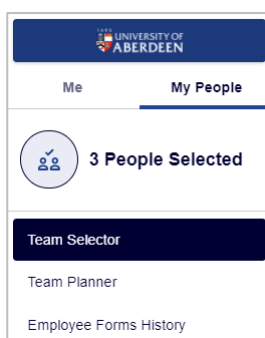
The Team Selector allows you to select staff (individually or in groups), then view records of associated holidays and absences in the Team Planner, or view their Employee Forms History.

To use the Team Selector:

1. From the **My People** tab, click **Team Selector**.
2. The default view in Team Selector is **Direct Reports** (under **Filters**). This view lists all team members directly under *your* line management.
3. If you have line management responsibility for many members of staff, use the **Search by team member name** to search for an individual by last name. Alternatively, **Filter** alphabetically **by surname**.
4. To view more detail about an individual (e.g. Title, Original Start Date, Mobile Phone Number), click on their name. This opens a separate dialog. Click the **x** at the top right to close it again.
5. Before using the Team Selector, you will need to select the team member (or members) whose records you want to view.
 - To select a *single* member of staff from the list displayed, click **Select** to the right of the team member's name. To deselect them, click on the **minus** symbol to the right of their name.
 - To select *all* members of staff, click **Select All**. To deselect them, click **Deselect All**.
 - To make a *custom* selection (e.g. 2 or 3 individuals), click the **plus** symbol to the right of their names. To deselect them, click **Deselect All**.
6. As soon as you select your team member(s), the Navigation Pane changes to reflect your choice.
 - If you only selected a *single* member of staff, it displays their name and job title at the top of the pane. From here you can view the **Sickness/Other Abs.**, **Holiday**, **Team Planner** and **Employee Forms History** for that individual.



- If you selected multiple members of staff, it displays the number of people you have selected at the top of the pane. From here you can view the **Team Planner** and **Employee Forms History** for all the individuals selected.



7. The Team Selector will always display your last selection until you click **Deselect All**.

Select All

Deselect All



If you are a Senior Manager, you are likely to manage more than one team, each with a dedicated team manager or team leader. To view only those members of staff who report directly to a specific team manager (or team leader), click **Show Reports** to the right of that team manager's name.

To return to the default view (*all* team members under your line management), click **Back to Peers**.

Delegation

As a Manager, you can (if you wish) delegate authorisation and responsibilities to a member of your team. For example, you may wish to do this before going on annual leave.



Authorisation allows you to delegate the authorisation of holiday and absence requests.

Responsibilities allows you to delegate the ability to request holidays or record absences on behalf of others.

You must create a unique rule for each type of delegation.

Create an Authorisation rule

To allow a member of your team to authorise holiday requests.

1. From the **Me** tab, click **My Responsibilities** in the Navigation Pane, then click **My Delegations**.
2. Click **[Add New]**.
3. For **Rule Type***, select **Authorisation**.
4. Add a **Description**, e.g. *Delegating holiday request authorisations to Jo Bloggs*.
5. For **Delegate To***, click **[Search]**.
 - Enter the *last name* of the person you want to delegate to, and click **[Search]**.
 - Locate the name of the team member you are delegating to, and click the radio button next to their name to select.
 - Click **[Continue]**.
6. For **Delegate For***, click **[Select]**.
 - Select individual members of staff or **Whole Team** as appropriate, and click on **[Continue]**.
 - One the rule is set up your nominated delegate will be able to authorise holiday/absence requests for these members of staff.
7. For **Module/Process Group/View***, click **[Select]**.
 - Select the Modules and Process Groups that you want to delegate – e.g. Holiday Request, Absences – or **[Select All]**.

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- Click **[Continue]**.
8. Choose a **From Date** from the date picker.
 9. Choose a **To Date** from the date picker. Alternatively, if the delegation period is indefinite, leave this field blank.



Note: Do *not* tick the box for **Absence**.

10. Click on **[Submit]**.
11. A confirmation message will be displayed on the screen.
12. The **Delegation** screen displays the new delegation rule.
13. Click **[Add New]** to enter a new rule or return to the Navigation Pane to select another service or **Sign Out**.

Create a Responsibilities rule

To allow a member of your team to submit holiday requests and record absences on behalf of other team members, and to view the Team Planner.

1. From the **Me** tab, click **My Responsibilities** in the Navigation Pane, then click **My Delegations**.
2. Click **[Add New]**.
3. For **Rule Type***, select **Responsibilities**.
4. Add a **Description**, e.g. *Delegating holiday, or absence request on behalf of Jo Bloggs*.
5. For **Delegate To***, click **[Search]**.
 - Enter the *last name* of the person you want to delegate to, and click **[Search]**.
 - Locate the name of the team member you are delegating to, and click the radio button next to their name to select.
 - Click **[Continue]**.
6. For **Delegate For***, click **[Select]**.
 - Select individual members of staff or **Whole Team** as appropriate, and click **[Continue]**.
 - Once the rule is set up, your nominated delegate will be able to submit holiday requests, record absences on behalf of other team members, and view the Team Planner.
7. For **Module/Process Group/View***, click **[Select]**.
 - Select the Modules and Process Groups you want to delegate – e.g. Absences, Holiday Request, Planner – or **[Select All]**.
 - By default, the Modules and Process Groups are all set to be **View Only**. If required, click the drop-down menu, and choose from: View Only, Save, Submit, and Save & Submit.
 - Click **[Continue]**.
8. Choose a **From Date** from the date picker.
9. Choose a **To Date** from the date picker. Alternatively, if the delegation period is indefinite, leave this field blank.



Note: Do *not* tick the box for **Absence**.

10. Click **[Submit]**.

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11. A confirmation message will be displayed on the screen.
 12. The **Delegation** screen displays the new delegation rule.
 13. Click **[Add New]** to enter a new rule or return to the Navigation Pane to select another service or **Sign Out**.

Edit a Delegation rule

1. From the **Me** tab, click **My Responsibilities** in the Navigation Pane, then click **My Delegations**.
2. Click on the rule's **Description** to open up the Delegation Rule Form.
3. Click **[Edit]**.
4. Amend any details required, click **[Submit]** or **[Delete]**.
 - The system will prompt you to confirm your request.
 - Click **OK** to submit, or **Cancel**.
5. Return to the Navigation Pane to select another service, or **Sign Out**.

Manager Reports

Use Manager Reports for reporting on staff Absence (between two date parameters, *or* for the current year), Probations Due and Length of Service.

1. From the **My People** tab, click **Manager Reports**



Note: If you have been using the Team Selector, you may need to **Deselect All** before **Manager Reports** is visible in the Navigation Pane.

2. Select the **Descent Level**.



By default, the descent level is 1. Most Team Leaders will only have one tier of reporting staff. If you are in charge of a section with one or many Team Leaders reporting to you, change to Level 2 to see all their reporting staff. If you are in Senior Management, select level 3 to drill to relevant sections.

3. Select the report you want to run, then click **[Next]**.

What happens next depends on which report you selected.
4. If you selected **Absence Between Two Dates** or **Absence Summary For This Year**, the next screen prompts you to **Show Employee**.
 - By default, this is set to **All Employees In Group**.
 - Leave it like this if you want to report on all your team members. Otherwise, click the drop-down and select an individual.
 - If you selected All Employees in Group, you can, if appropriate, opt to **Include Self**.
 - Click the **Calendar** beside the **Date From** and **Date To** fields, and choose from the date picker.
 - For **Absence Type**, choose from the drop-down list, e.g. Holiday, and click **[Next]**.
 - Report results will be displayed. From here, you can **[Print]** or go **[Back]** to the previous screen.
5. If you selected **Length of Service**, **List of Employees**, or **Probations Due**, the report results are displayed on the next screen. From here, you can **[Print]** or go **[Back]** to the previous screen.

Help, support, and Feedback

If you need further help using MyHR, or if you have any feedback on this service, please contact myhr@abdn.ac.uk. All feedback will be treated in confidence.