# SETU Manager Request Guidelines

July 2024 Version 1.C



Use Manager Requests to make requests on behalf of <u>current employees</u> (short-term backfill cover, contract extensions, requests for CIDs, etc.).



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## Create a Manager Request

- 1. Log in to <u>Core Portal</u> using **Google Chrome**.
- 2. Select the Manager Dashboard.
- 3. Click on **Requests** on the left-hand menu and select **Create Request** on the Manager Requests Widget.

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4. Complete the Manager Request form as follows:

#### Section 1: Employee Details

**Employee Field** 

Select the employee for whom you want to raise the request from the drop-down menu (essentially a list of your direct reports in the Manager Dashboard > My Team > My Team widget).

If the person for whom you want to raise the manager request is not on your team list in Core, select the **Manager Request Substitute** option.

See scenarios below for guidance on how to complete the *Employee field*.



#### Example B:

You wish to extend John Murphy's contract. John is one of your team members in Core.

In this scenario, select John Murphy for the Employee Field and Fixed Term for Request Type.

Scenario 2: Person for whom you want to raise the manager request is not on your team list (i.e. works in another Faculty/VP unit.

Example

You need to backfill 4 teaching hours on a particular course and have identified one or more employees in another Faculty/VP unit (i.e. not on your team list in Core) who can backfill the hours.

In this scenario select the **Manager Request Substitute** option for the <u>Employee</u> field, **Specified Purpose** for <u>Request Type</u> and include actual name or **names of employees from the other Faculties/VP units** in the <u>Comments</u> field.

**Employee ID and Appointment fields** 

The system automatically generates the employee ID and appointment once an employee has been selected in the Employee field.

**Request Type field** 

Choose from the following options, depending on the type of request you wish to raise:



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#### Section 2: Request Details

Complete relevant fields under Request Details, mandatory fields are marked with an asterisk \*

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#### NB - Comments field

Please use the **Comments** field to provide the approvers with as much information as possible in relation to the background to the manager request.

If you have selected **Manager Request Substitute** for the Employee field in Section 1: Employee Details, please ensure to document the actual name (s) of the employees who were not available to select in the Employee field in the **Comments** field.

#### Section 3: Attached Documents

If you wish, you can upload further information to support the manager request (including a Job Description if relevant).

- Choose **Upload** on the top right-hand corner of the screen.
- Click on the arrow above 'Click or drop files here to upload'
- Locate the file on the computer drive.
- Select 'Open'
- Click on OK.

The uploaded documents will be visible in the Attached Documents section.

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5. Click on **Submit** at the bottom right-hand corner, and **Yes** on the next dialog box which will submit the manager request to the approval workflow:

	Submit Manager Request	Requ
	Would you like to submit this manager request?	
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## Check the approval status of a manager request

- <u>Core Portal</u> > Manager Dashboard > Requests > Manager Requests > Locate the relevant request > click the 3 dots > View. Scroll down and approval status will be available under Request History section.
- A notification to Outlook will also be sent at each stage of the approval process.

## Re-submit a manager request that has been rejected

- <u>Core Portal</u> > Manager Dashboard > Requests > Manager Requests > Locate the relevant request > click the 3 dots > Edit.
- Make the necessary amendments and submit.

### How to approve a Manager Request

Step 1: To view the request that needs to be approved, log in to <u>Core Portal</u> > Manager Dashboard > Approvals.

**Step 2:** All manager request approvals are displayed in the "My Approvals Notifications" widget on the Manager Dashboard and the name of the person who requested the manager request will be shown.

Select View to see the details.

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**Step 3:** Click **View Details** on the top right-hand corner of the following screen. The form and documents attached to the manager request will display on the next screen:

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**Step 4:** Click the **Back** button on the browser window to return to the previous screen and choose **Approve or Reject** as applicable, entering comments when prompted.

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- A message will display on screen confirming the request has been approved successfully and a notification will issue to the next approver in the approval workflow.
- Each approver will follow the same steps in order to approve the Manager Request.
- Once the final approver approves the request, a notification will issue to the person who initially submitted the Manager Request informing them the request has been approved.

## Links to Further Resources

Manager Request Quick Reference Guide Video - Creating Manager Requests (6:13 mins)