CoreMobile

User Guide

Contents

1. Overview

1.1. Purpose of the Guide

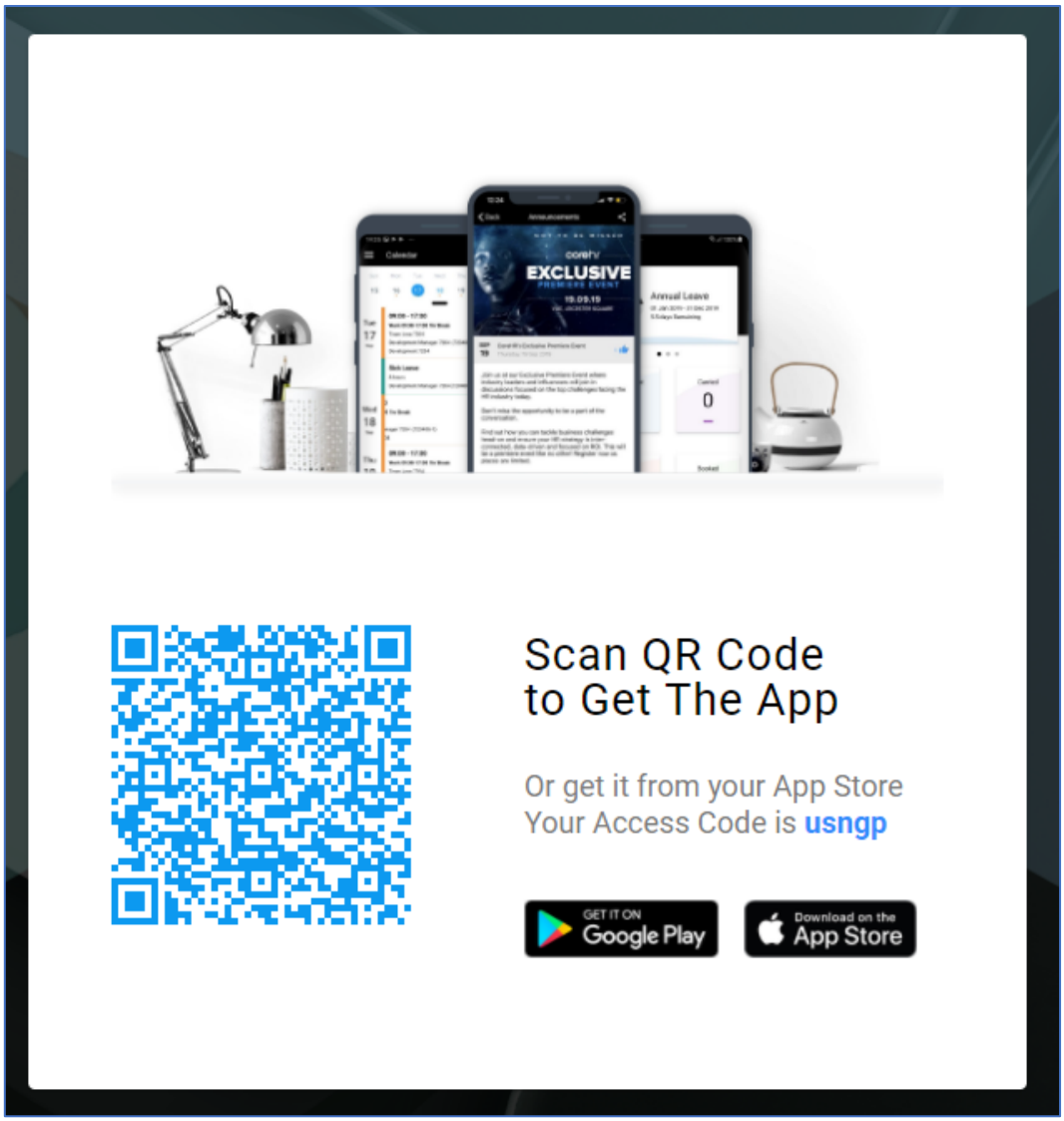
The purpose of this document is to provide detailed guidance on the CoreMobile app, including the following features:

- Profile
- Book Time Off
- Payslips
- Expenses

2. System Access

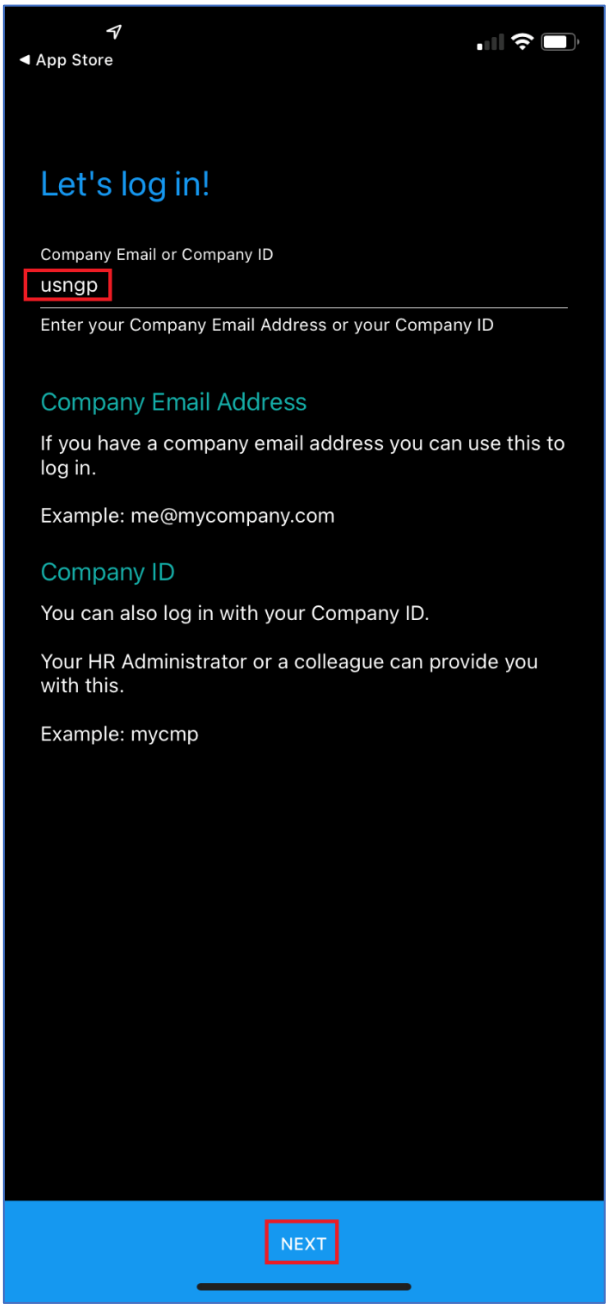
2.1. Logging In

The CoreMobile app can be downloaded by scanning the following QR code or by searching ‘CoreHR’ within the Apple App Store or the Google Play Store:



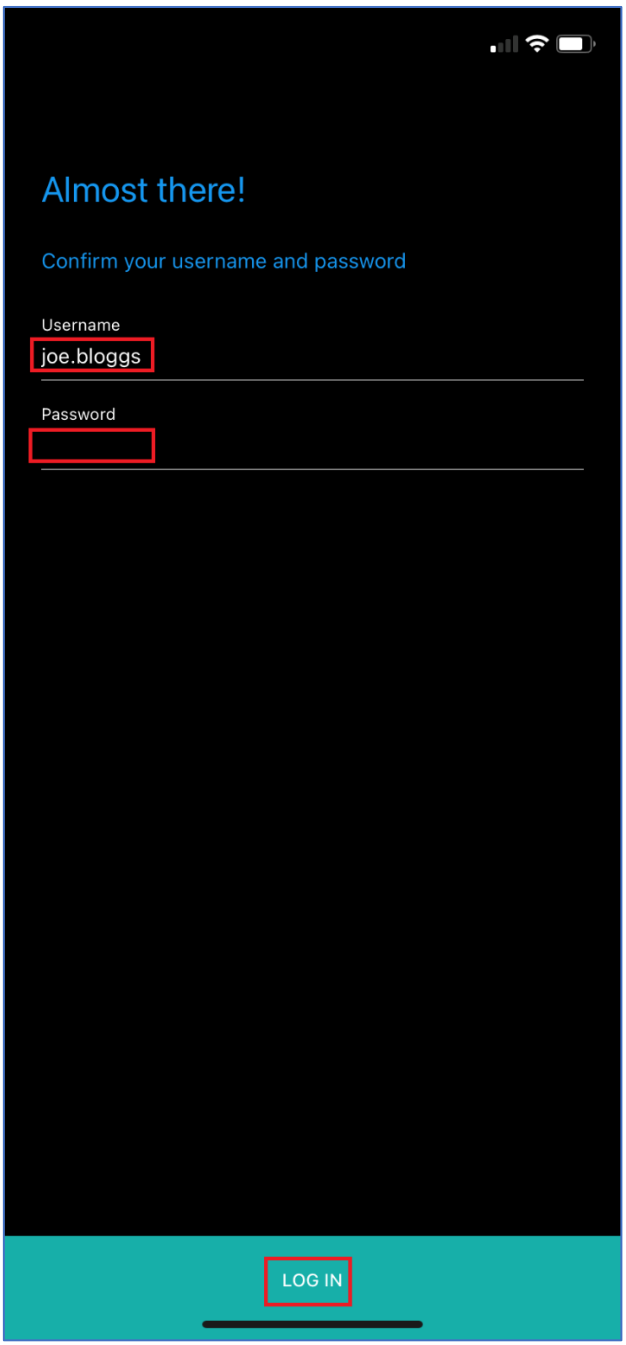
Follow these steps to log in to the CoreMobile app:

- Enter the Company ID: usngp and click NEXT:



Note
It is not possible to log in using your Company Email Address. You must enter the above Company ID which must be entered in **lower case**.

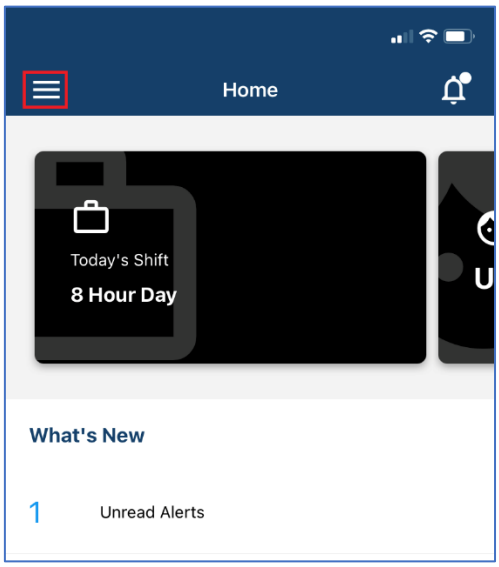
- Enter the username and password you usually use to log in to CoreHR, then click LOG IN. Your username is in the format of 'forename.surname':



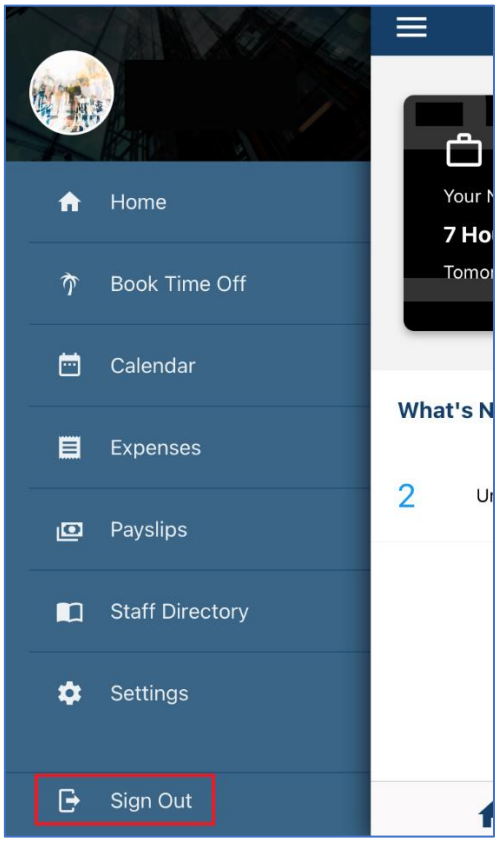
If you have any issues logging in, please contact the HR Admin team on hrselfservice@theus.org.uk.

Follow these steps to log out of the CoreMobile app:

- To log out of the CoreMobile app, click on the three-line menu button:

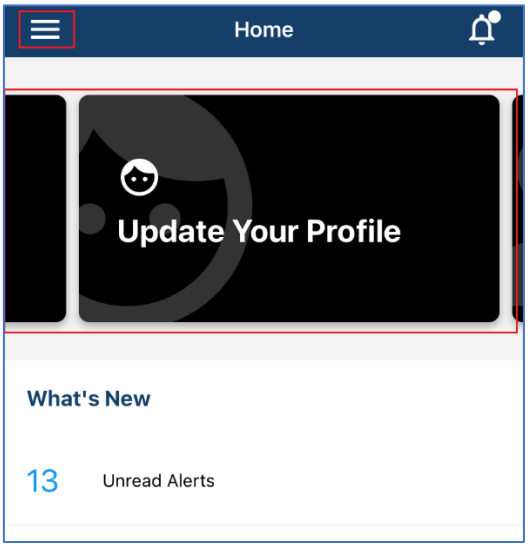


- Then click Sign Out:

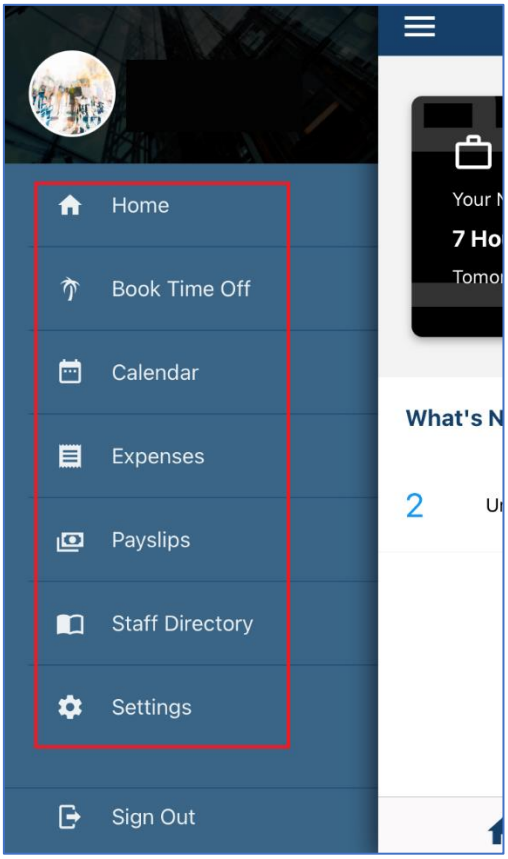


2.2. Navigating the app

To navigate the app, either click on one of the shortcuts available on the homepage, or click on the three-line menu button to access the menu:



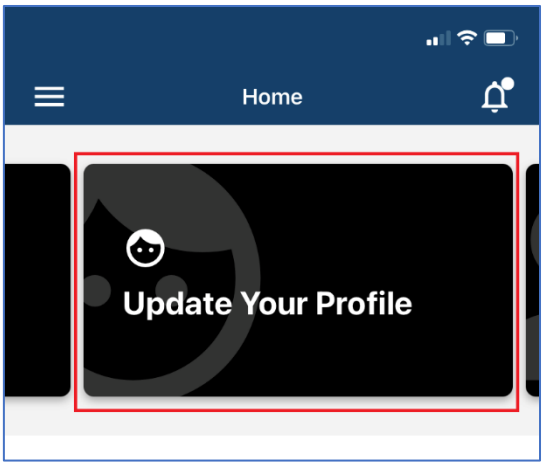
Then click on the relevant item from the menu:



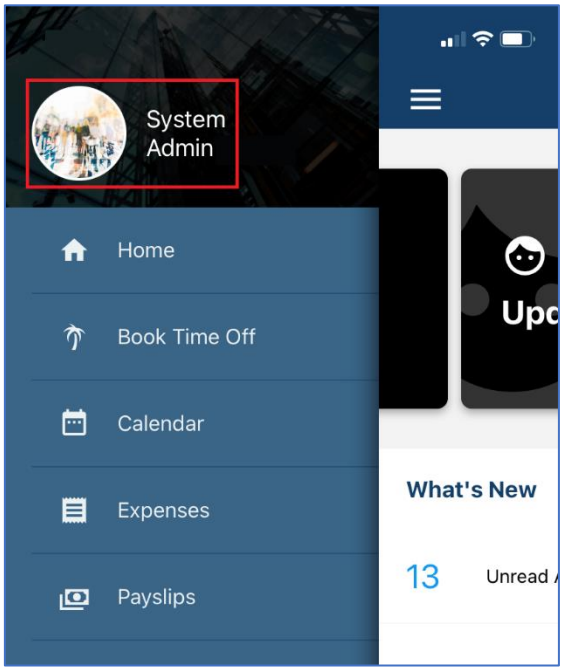
3. Profile

3.1. Profile Screen

You can access My Profile either by clicking on the shortcut within the home page or clicking on your name within the menu (which is accessed by clicking on three-line menu button):



OR



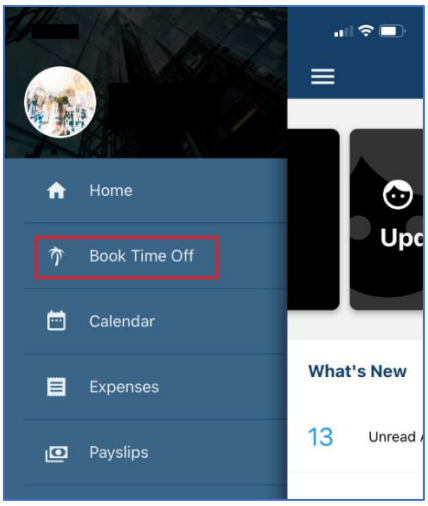
Within My Profile, users can view and/or update the following details by clicking on the pencil icon:

- Address Details
- Bank Details
- Next of Kin

4. Book Time Off

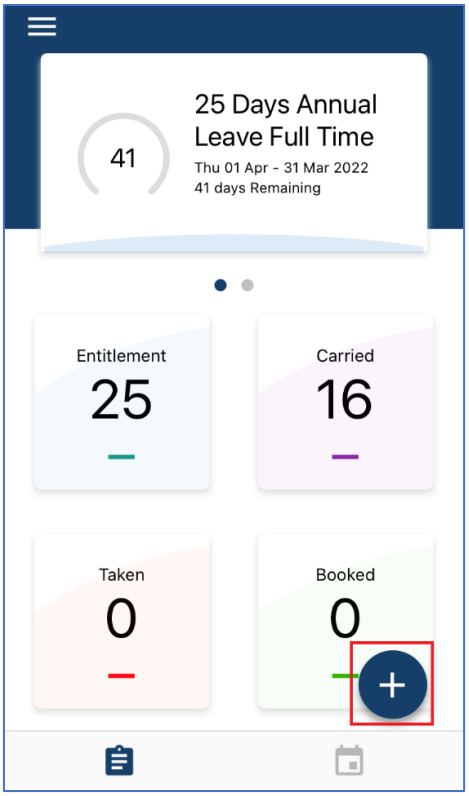
4.1. Book Time Off Screen

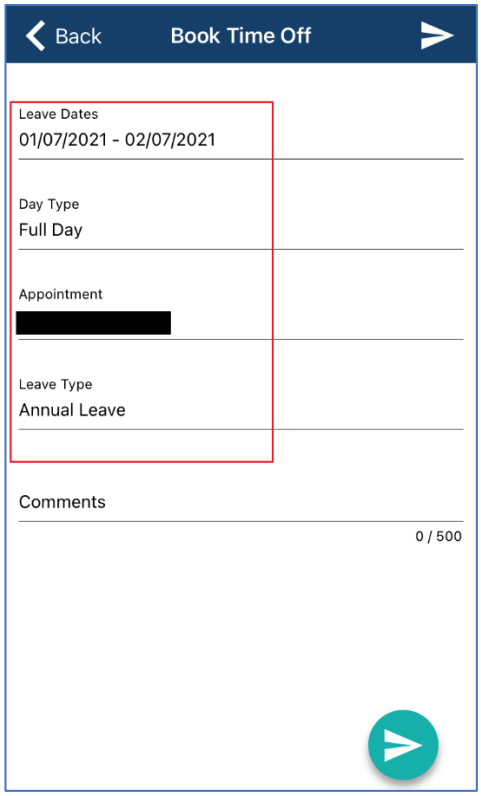
To access the Book Time Off Screen, navigate to the menu (which is accessed by clicking on three-line menu button) and click Book Time Off:



Within the Book Time Off Screen, you will be able to view a live summary of your balance(s). To book time off, click on the (+) icon then:

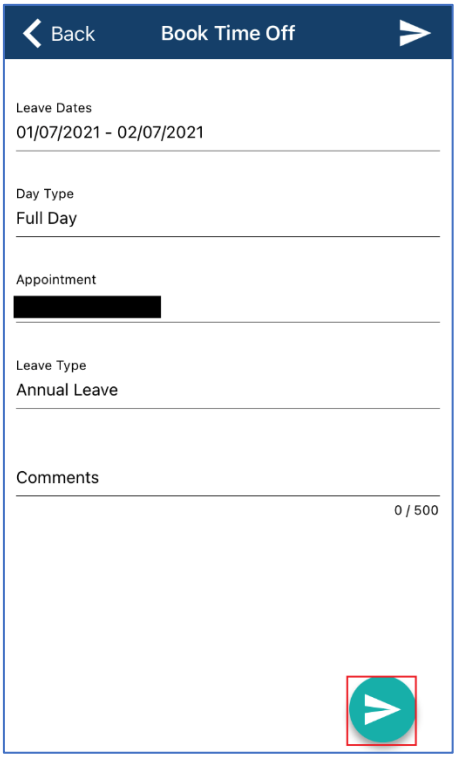
- Enter the dates
- Choose the day type i.e. full or part day (if entering one day only)
- Choose the leave type:





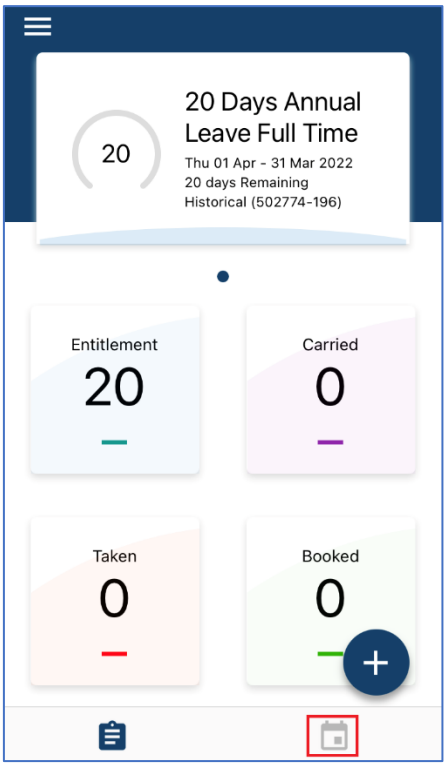
Note
If you have more than one appointment, ensure you select the correct one.

To submit your request, click on the submit arrow icon:

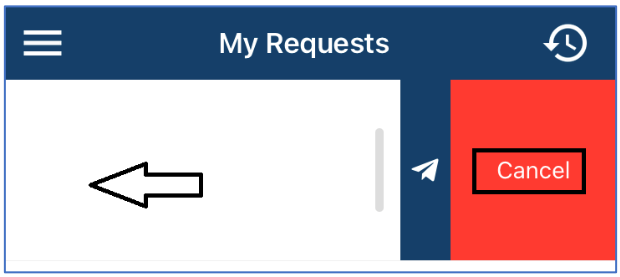


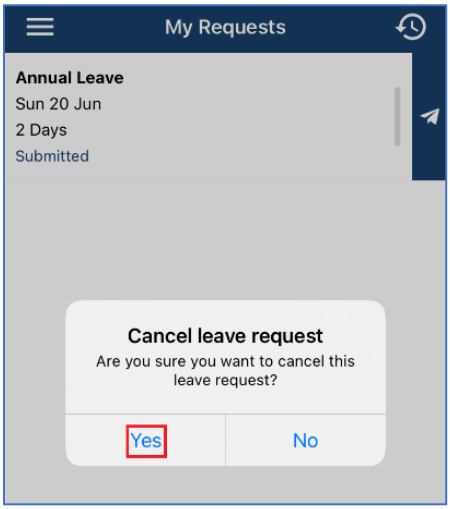
4.2. Cancel Time Off

To cancel time off, click on the 'My Requests' icon within the Book Time Off screen:



Swipe the leave request that you wish to cancel to the left, and click 'Cancel' and then 'Yes' on the pop-up message:

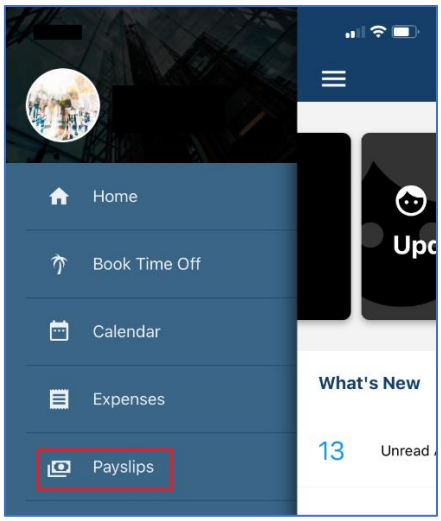


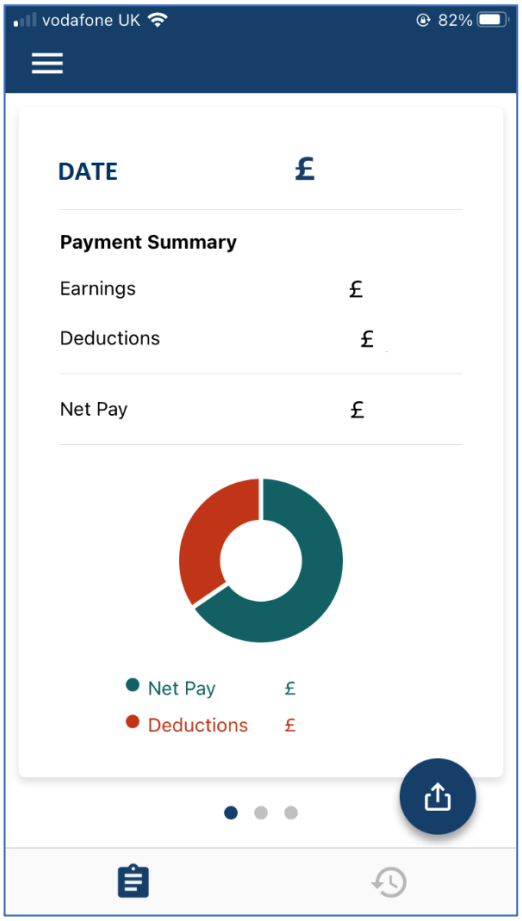


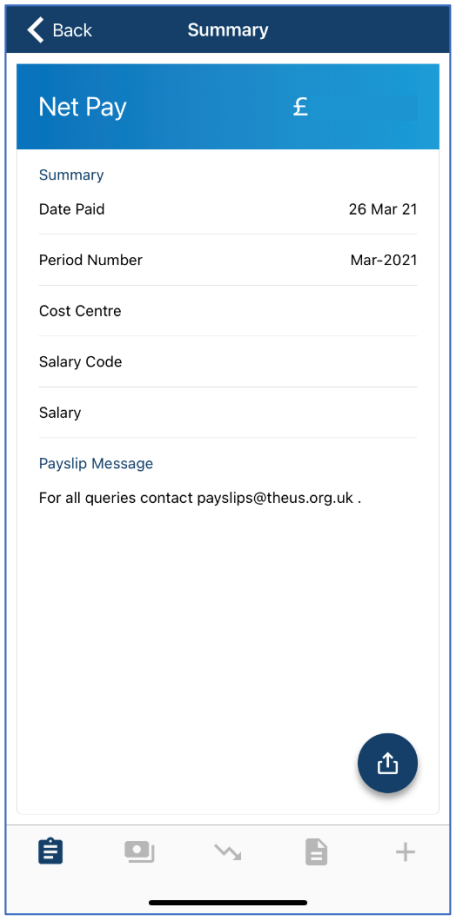
5. Payslips

5.1. Payslips Screen

Online Payslip functionality allows users to view and download their current and historical Payslip Details. There is also an option to view a detailed breakdown per month:







6. Expenses

6.1. Expenses Screen

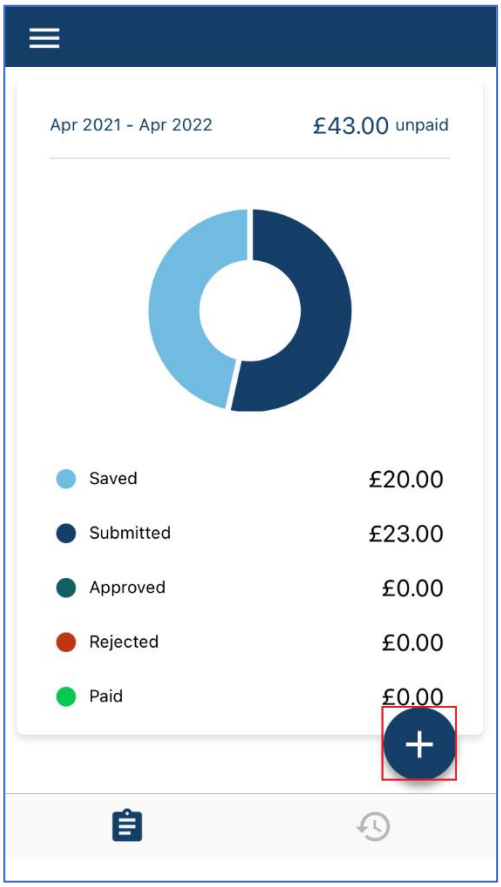
The Expenses feature allows employees to submit and track their Expense Claims.

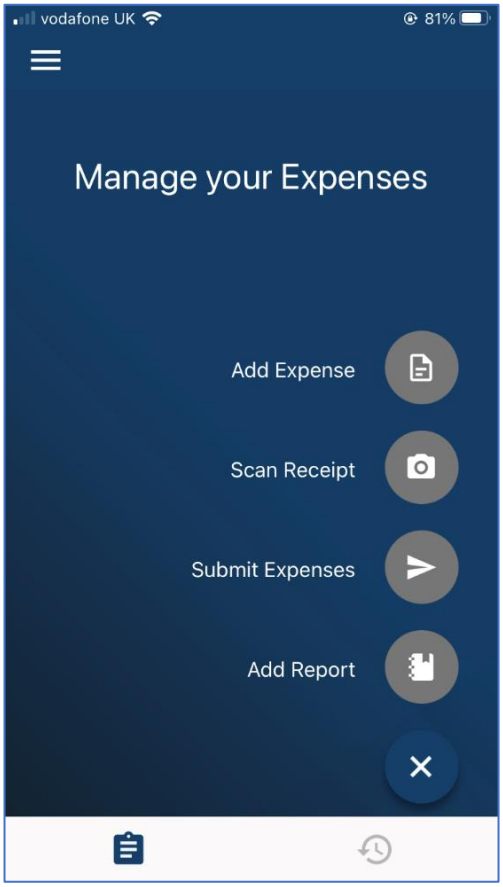
When submitting Expense Claims within the CoreHR portal, firstly you must create an Expense Report before you are able to add Expense Items. However, within the app you have the option to add the Expense Items prior to creating the Report; this can be created later, once you are ready to submit.

Mileage claims: you should populate the distance and the From/To Location fields. Please note, if claiming expenses via the CoreMobile App, there is a character limit of 30; therefore you will need to abbreviate these fields.

It is possible to complete the following actions from the app:

- Create, review and submit your Expenses:
  - Add Expense
  - Add Receipt
  - Create Reports
  - Submit Expenses
  - Review Expenses

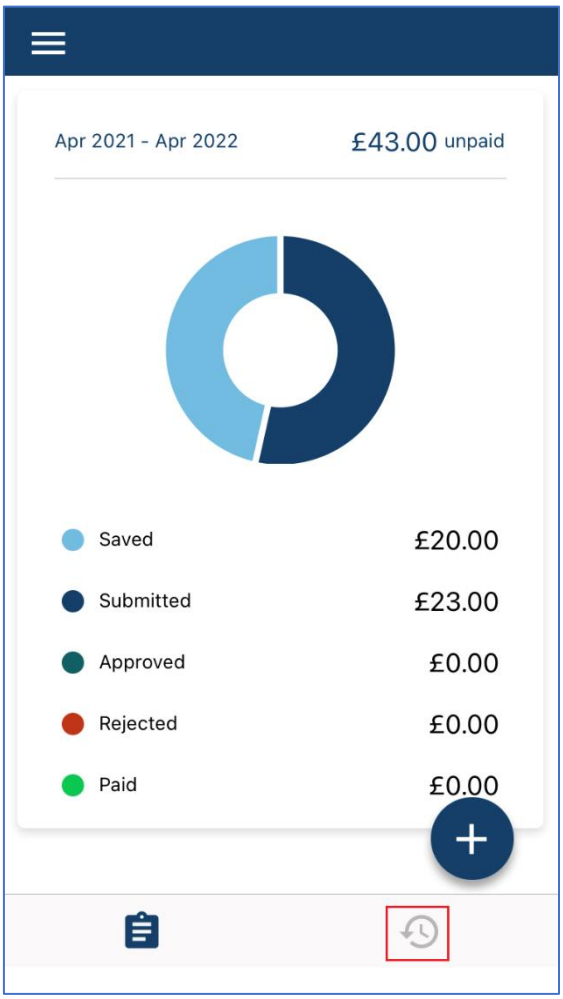


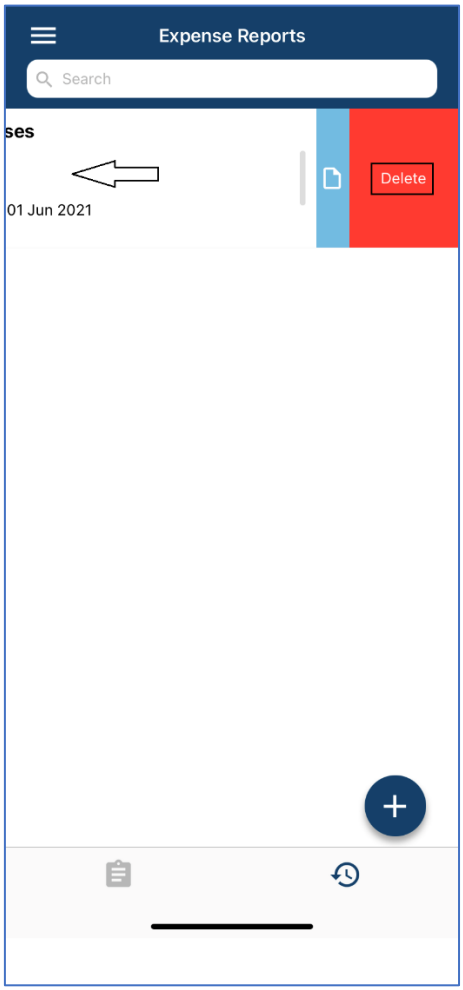


It is also possible to view/action your Expense Reports. Depending on the status of the report, within the Expense Report screen you can complete the following actions by swiping the relevant report to the left:

- Edit
- Delete
- Submit
- Unsubmit (for those with a status of 'Submitted' only)

You can also View an Expense Report by clicking on it.





6.1.1. Tips for submitting Expenses on the App

You can still submit expenses via the app in the same way you do within the CoreHR Portal, if you wish. To do this:

1. Select Create Report.
2. Add items to the report.

Alternatively, this table provides some tips on how to quickly add expense items via the app, and collate this into a single Expense Report to submit for manager approval:

Requirement	**Recommended Approach**
Scanning a receipt?	Select the **Add Receipt** option. • This can populate the date and value for you and save you some time. • If you're in a rush you can leave it there and come back to it later, your receipt is saved as soon as you upload it and a draft item is created.
No receipt to scan or prefer to enter manually?	Select **Add Expense**. You'll be guided through the process to add the expense item.
Ready to send your expenses to your manager?	1. Select **Submit Expenses**. You'll then see a list of expenses that have not been assigned to a report. 2. Select the items you want to submit. 3. Complete the Expense Report: a. The report dates will be populated based on these items but you can change this if needed. b. Populate the remaining Expense Report fields and click Submit.