This guide will explain the CoreHR system and its products used by the University. The guide covers advice on how to use general functionality of CoreHR and login.

- **CorePortal** – web-based CoreHR and used for raising and approving staff requests, and managing recruitment vacancies, and personnel records on a day-to-day basis.
- **HR Reporting** – a separate reporting tool that extracts data from CoreHR. Run reports to assist with tracking and monitoring recruitment and personnel data. Information on accessing and using HR Reporting is covered in the relevant reporting guidance.

<table>
<thead>
<tr>
<th>Who is this guide aimed at?</th>
<th>Predominantly all new users of CoreHR, including read-only, specialist and administrative users. It can also be used to refresh an existing user’s knowledge.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key points to note, eg policies</td>
<td>Guidance on generating correspondence through CoreHR such as letters, emails and forms are captured in the relevant How-To guides.</td>
</tr>
<tr>
<td>Useful links</td>
<td>New users must complete the <em>Introduction to CoreHR</em> eLearner before using CoreHR.</td>
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1. CoreHR overview

Before using CoreHR it is important to be aware of the following information:

Internet browsers

CoreHR should work in most internet browsers. When using Chrome certain text fields may populate with information stored in your Chrome settings. You can turn off ‘auto-fill’ in your browser settings to prevent this from happening.

Note: Regularly clearing cache on your browser will ensure the best performance from CoreHR.

System availability

Navigate to: https://hrsystems.admin.ox.ac.uk/corehr-availability

Here you will be able to see whether CoreHR or HR Reporting are available to access and whether that access is restricted to read-only.

Also listed are details about ‘At-risk’ and downtime windows where access and use of the system may be compromised or restricted.

2. Portal

Log in to CoreHR

Log into CoreHR and access any of the following (depending on your system access):

- Employee Dashboard
- Manager Dashboard
- Recruitment
- People Management
- CoreHR back office
1. Navigate to https://hrssystems.admin.ox.ac.uk/corehr-availability
2. Click on LOGIN.

![Login page](image)

3. Enter your username and password. These will be your Single Sign-On details, eg admn1234.

   Note: If you have forgotten your password, please contact the IT Services Help Desk or go to the IT Services website to reset it. Do not use the ‘Forgot password or security question’ link.

4. The Employee Dashboard will open.

**Employee Dashboard/Employee Self-Service**

The Employee Dashboard is your Employee Self-Service page, where you will find basic details about your employment, such as your current appointment(s), service details, payslips, and the next pay day. You can also access details related to vacancies for which you have applied.

![Employee Dashboard](image)

**Access**

Log in to CoreHR > Employee Dashboard

1. On the **Employee Dashboard**, hover your cursor over the red circle holding your initials in the top left-hand corner, it will flip to reveal ‘**My Profile**’. 

![My Profile](image)
2. Click on the red circle.
3. This will open your staff record.

Further guidance on Employee Self-Service can be found in the Employee Self-Service How-To Guide.

**Dashboard menu**

All the following dashboards are accessed from the same location. You will only see the dashboards to which you have access.

1. Select the drop-down arrow next to the heading of the current dashboard you are on. This will be the **Employee Dashboard** if you have just logged in.
2. Click on the dashboard you wish to open.

**Recruitment or People Management**

1. Select either **Recruitment** or **People Management** from the dashboard menu to open the relevant dashboard.

**Staff Request**

If you need to create or approve staff requests, **Staff Requests** will be found on the **Recruitment Dashboard**.

1. Select **Staff Requests** from the left-side **Navigation** menu.
2. Click on **VIEW**.
3. This will open **Staff Requests** where you can create new requests and view current requests and approvals.

Further guidance on Staff Requests can be found in the Create and approve staff requests how-to guide.
**Manager Self Service**

The Manager Dashboard enables managers, who have been granted the relevant access, to view their team members’ records.
1. Click on **Manager Dashboard** from the dashboard menu.
2. Select **My Team** from the left-hand **Navigation** menu to view your team members.

Further guidance on Manager Self Service can be found in the Manager Self-Service How-To Guide.

**Return to previous screens**

**Return to Employee Dashboard**

1. Select the drop-down arrow next to the dashboard title
2. Click on **Employee Dashboard** to return to your personal details.

There are two options that can be used to return to previous screens:

**Back arrow**

1. To return to a previous screen click the back arrow next to the screen title.
2. Keep clicking the back arrow until you reach the screen you want to return to.
3. The back arrow can be clicked until you are back at the main dashboard screen.

**Return using the ‘breadcrumbs’ function**

You can navigate back through pages you have visited by using the ‘breadcrumbs’ function. This function is a horizontal list of screen titles. These are the screens you have navigated through to reach the current page you are viewing.
1. Click a screen title to return to that screen.
2. Alternatively, click the dashboard title (first name in the list) to return to that dashboard. As shown in this example:

![Vacancy Details: 145548 - Senior Systems Administrator](image)

**Logging out**

Follow the below steps to securely log out of CorePortal:
1. Click on the small red circle, top right of your screen. This is visible on all screens and includes your initials.
2. A small window will open below the small red circle
3. Click on **LOG OUT** found at the bottom of this window.

⚠️ **Note*** Do not close your browser window without logging out properly.

**Working in the Portal**

**Screen resolution**

To change the size and resolution of the data and view of your screen, when using CorePortal, either:
1. select the zoom icon on your internet browser, usually a magnifying glass icon
or
2. on your keyboard, hold the ‘Ctrl’ key and use either the ‘-‘ or ‘+‘ key.

⚠️ **Note*** The view of your CorePortal screens will be changed or impacted by the resolution settings of your internet browser. These can be amended in the settings of your internet browser.
Dashboard overview

1. The dashboard selected is shown at the top, eg Recruitment, People Management, Employee Dashboard etc.
2. The menu listed to the left of the screen is called the Navigation menu and can be used to navigate to other screens available on the selected dashboard, eg Vacancies in Recruitment, Command Centre from People Management etc.
3. The white box on the main screen highlighted below is called a Widget. These are additional menu options available from the option selected from the Navigation menu, eg search for a vacancy from Vacancies, view Employees from the Command Centre etc.
4. You can search for a specific dashboard or widget from the search bar at the top of the main screen.

Navigation menu

The Navigation menu (label 2 in the large image on the previous page) can be expanded or collapsed using the three-line icon found top left.

When collapsed the names of the menu options are hidden and only the menu’s icon is shown. Hover on the icon to display the menu name.

Search for a dashboard or a widget

The search bar can be used to navigate to a specific dashboard or system area (CoreHR back office) or widget:
1. Click in the search bar.
   1.1 All dashboards and CoreHR Back Office appear in the list below; select the option wanted.
   1.2 If it does not appear below, type the name of the dashboard/widget wanted into the search bar and select from the options returned.
Notifications Centre

There is a Notification Centre in the portal that can be accessed through the notification bell icon. Different notifications may be listed here, some examples are:

- confirmation that documents have generated, including letters and forms;
- confirmation application packs have either been generated or merged; and
- status updates relating to transfer requests.

View a notification
1. When there is a notification waiting you will see a numbered red circle on the notification bell.
2. Click on the bell icon.
3. Click on a notification to view the full message.
4. Click OK once you have read the message.

Open Notification Centre
If you have many notifications waiting to be viewed, open the Notification Centre:
1. Click on the bell.
2. Click on the ellipsis (three dots).
3. Select Notifications Centre.

Mark notifications as read
1. Follow steps 1-2 above (Open Notification Centre).
2. Select Mark all as Read.

Functions of common buttons and message alerts

<table>
<thead>
<tr>
<th>Field name</th>
<th>Description</th>
</tr>
</thead>
</table>
| VIEW ALL   | Used to either:
  - select a row to open another screen (eg Employee Search from the Command Centre in People Management);
  - view the details presented in another format (eg vacancies displayed as tiles to a list of vacancies); or
  - expand the widget to full size window (eg clicking VIEW ALL on the Interviews widget from Recruitment Dashboard). |
| VIEW       | Used to either:
  - navigate to other menu screens (eg Applicant Details from the Vacancy in Recruitment Dashboard); or
  - process a specific task (eg link a planned appointment to a vacancy).
  The options listed under Actions can change; always click the drop-down to check. |
<p>| SAVE       | Usually found bottom right of the screen. When changes are made you are not automatically prompted to save. Always remember to click SAVE when you make any changes. |</p>
<table>
<thead>
<tr>
<th><strong>Ellipses button</strong>, like the Actions button there are options to navigate to other menu screens or click on an option to process a specific task. However, these options relate to the details of the specific row the ellipsis appears on, eg specific to an applicant.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Navigate through pages of returned results.</strong></td>
</tr>
<tr>
<td><strong>Drop-down arrows allow you to select a field value from a list. Where the list is long it may be slow to appear. Instead, you can start to type the details you want into the field and the list of options will be reduced.</strong></td>
</tr>
<tr>
<td><strong>Search and filter</strong></td>
</tr>
<tr>
<td><strong>Success message</strong></td>
</tr>
<tr>
<td><strong>Warning message</strong></td>
</tr>
<tr>
<td><strong>Nothing to see here...</strong></td>
</tr>
<tr>
<td><strong>Expand columns</strong></td>
</tr>
<tr>
<td><strong>Add or remove columns</strong></td>
</tr>
</tbody>
</table>
| **Date format** | Dates in most date fields can be entered in one of two ways:  
1. Click the calendar icon and click on the date you require. Use the arrow buttons to navigate to the correct month/year.  
2. Manually type the date in one of the following formats (portal only): DDMMYY or DDMMYY or DD-MMM-YYYY. |