NAV1 - Accessing & navigating CoreHR

HRIS SUPPORT CENTRE

There are three different areas of the system:

- **CorePortal** - web-based and is used for raising and approving Staff Requests, and where recruitment vacancies are managed.

- **CoreHR back office** - where personnel records are managed on a day-to-day basis.

- **Discoverer** - where reports are run to assist with tracking and monitoring HRIS recruitment and personnel.
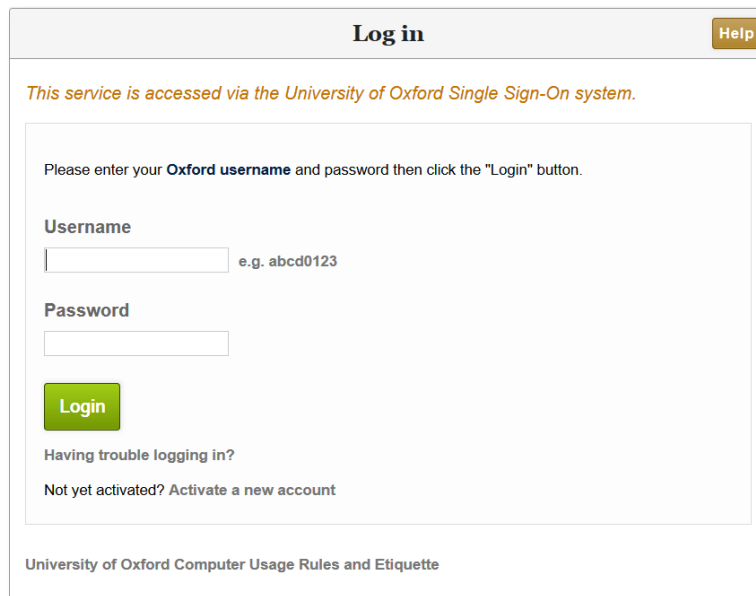
This guide covers the following process steps:

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1. Accessing the Portal

1. Click on **LOGIN** under CoreHR. The *Log in window* opens:

Log in   Help

This service is accessed via the University of Oxford Single Sign-On system.

Please enter your **Oxford username** and password then click the "Login" button.

Username

⬚   e.g. abcd0123

Password

⬚

Login

Having trouble logging in?

Not yet activated? **Activate a new account**

University of Oxford Computer Usage Rules and Etiquette

2. Enter your **username and password**. This will be your Oxford Username (also referred to as Single Sign On) e.g. admn1234
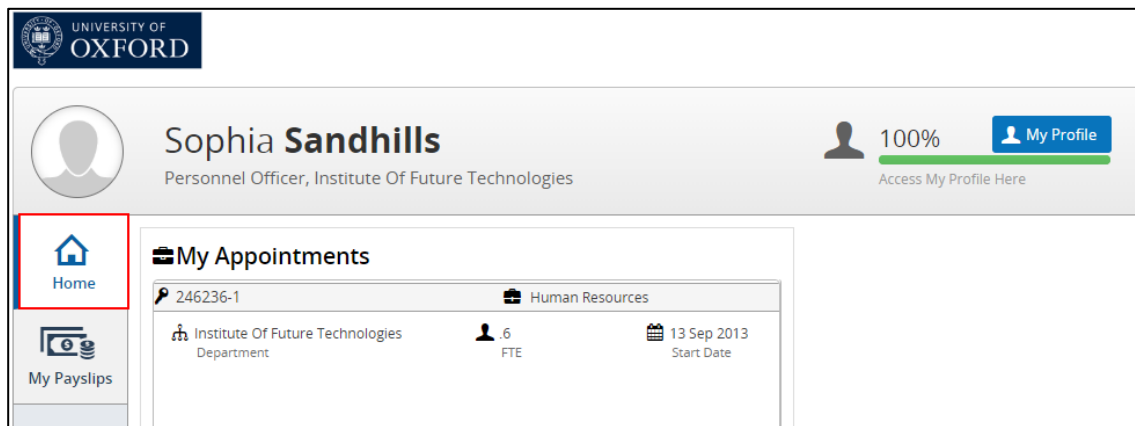
> ⚠ If you have forgotten your password please contact the IT Services Help Desk or go to the IT services website to re-set it.
>
> Do not use the 'Forgot password or security question' link.

A. Employee Self-Service

The employee dashboard is where you will find basic details about your employment, such as your current appointment(s), service details and the next pay day.
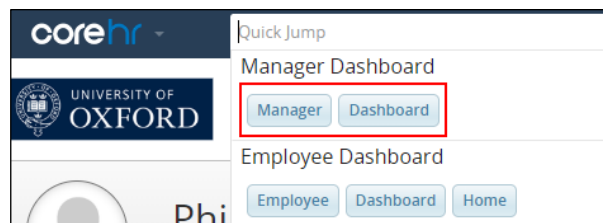
Further guidance on Employee Self Service can be found in the [Employee Self-Service How to Guide](#)
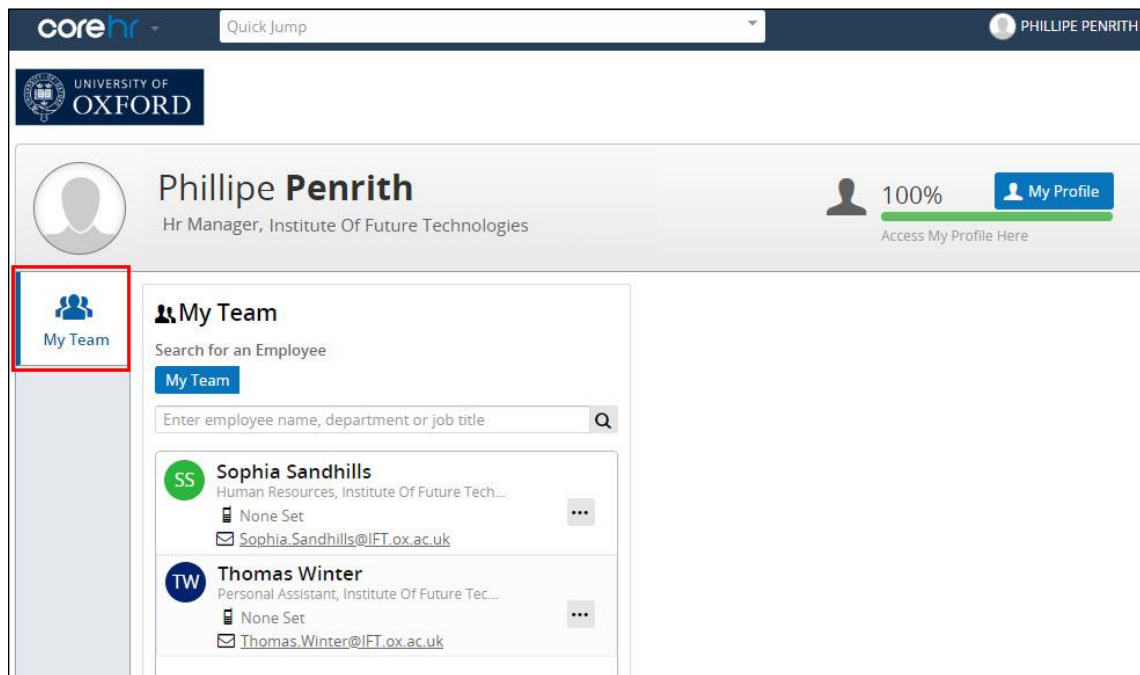
B. Manager Self-Service

There are two dashboards available to managers, the Employee Dashboard, enabling you to see your own details and the Manager Dashboard, through which you can access your team members' records.

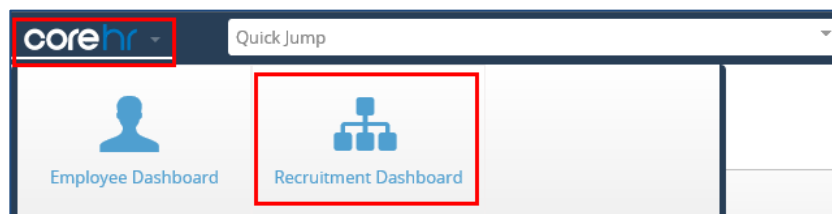**3.** Click on the **Quick Jump** dropdown menu and select **Manager Dashboard**.

4. The **My Team** tab will be active and a list of team members displayed.
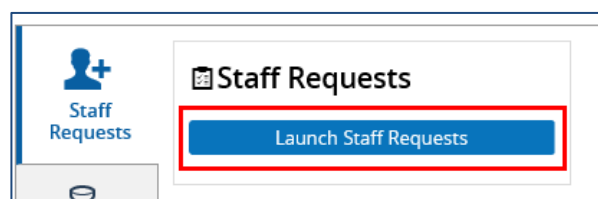
Further guidance on Manager Self Service can be found in the Manager Self-Service How to Guide.

C. Staff Requests

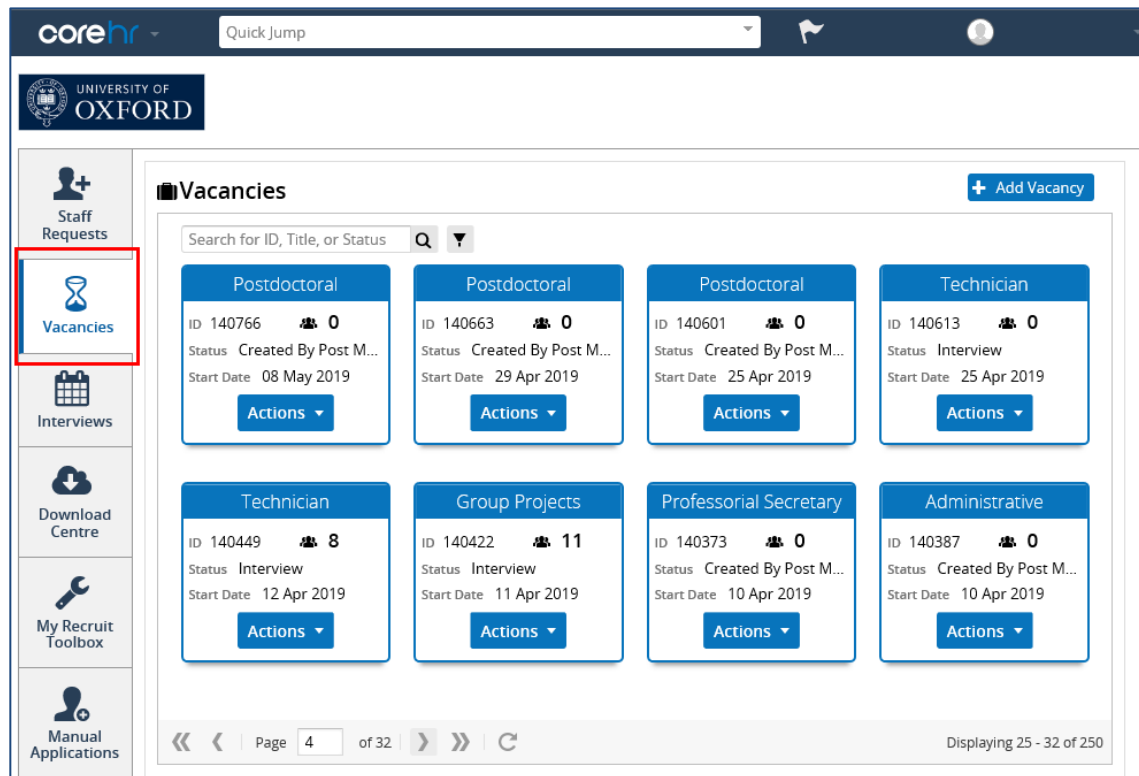1. Click on **CoreHR** at the top of the screen and select **Recruitment Dashboard.**

2. Click on **Launch Staff Requests**

Further guidance on Staff Requests can be found in the RQ1 Creating and approving a staff request.

D. Vacancies

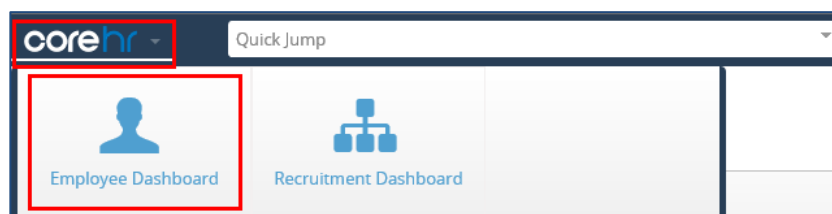**1.** Follow the steps above and click on **Vacancies**

Further guidance on managing vacancies can be found on <u>Recruitment training and support pages.</u>

E. Return to the Employee Dashboard

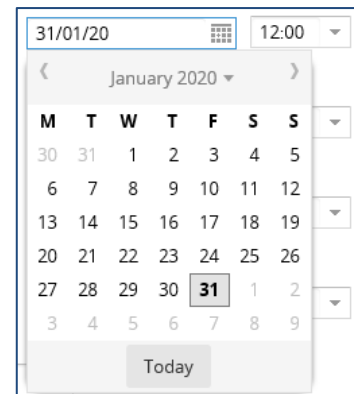**1.** Click on **CoreHR** at the top of the screen and select **Employee Dashboard**

2. Working in the Portal

F. Entering Dates

Most date fields allow you to enter a date in one of 2 ways:

1. Click the ⊞ icon to view the calendar.

2. Use the ⟨ and ⟩ buttons to navigate to the correct month and click on the date you require.

OR manually type the date in one of the following formats (portal only): 10/10/19 or 10OCT19 or 101019 or 10-OCT-2019 (when you move out of the field the system will automatically reformat it).

G. Key to Function Buttons/Icons

Icon	Function
▼	Filter
🔍	Click to search
⟩	Next page
⟨	Previous page
⟫	Last page
⟪	First page
⟳	Refresh
⋯	More options
Save	Save
⊗	Click to close the screen

3. Accessing Core Back Office

1. Click on the **Quick Jump** menu at the top of the screen and select **CoreHR Back Office.**

2. Depending which browser you are using you will receive popups similar to the following that you will need to click through as highlighted below:
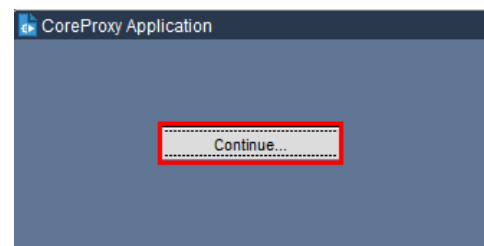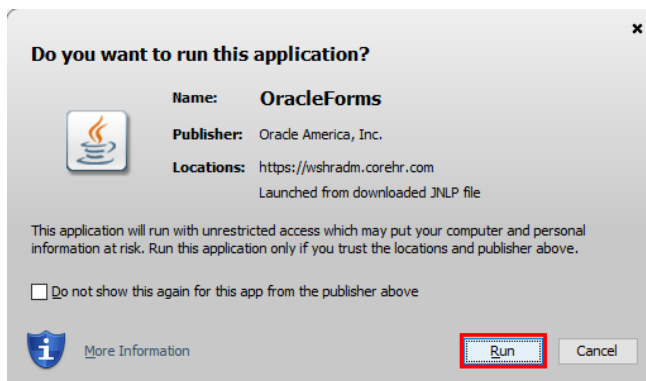
H. Personnel

3. Click on the CorePersonnel tab

> If you are a salary approver you will need to click on **Acknowledge** in order to proceed to the CorePersonnel back office.

I. Recruitment

4. To access the Recruitment module click on CorePersonnel in the right-hand menu

5. Select **Recruitment** from the top menu

4. Working in CoreHR back office

J. The Status Bar

Along the bottom of the Core screen is a status bar (you may need to maximise the window to see this fully).

Enter value for personnel no... **A**
Record: 1/1 **B** ... List of Val... **C**

[A] Guidance on completing the current field (and errors if applicable).

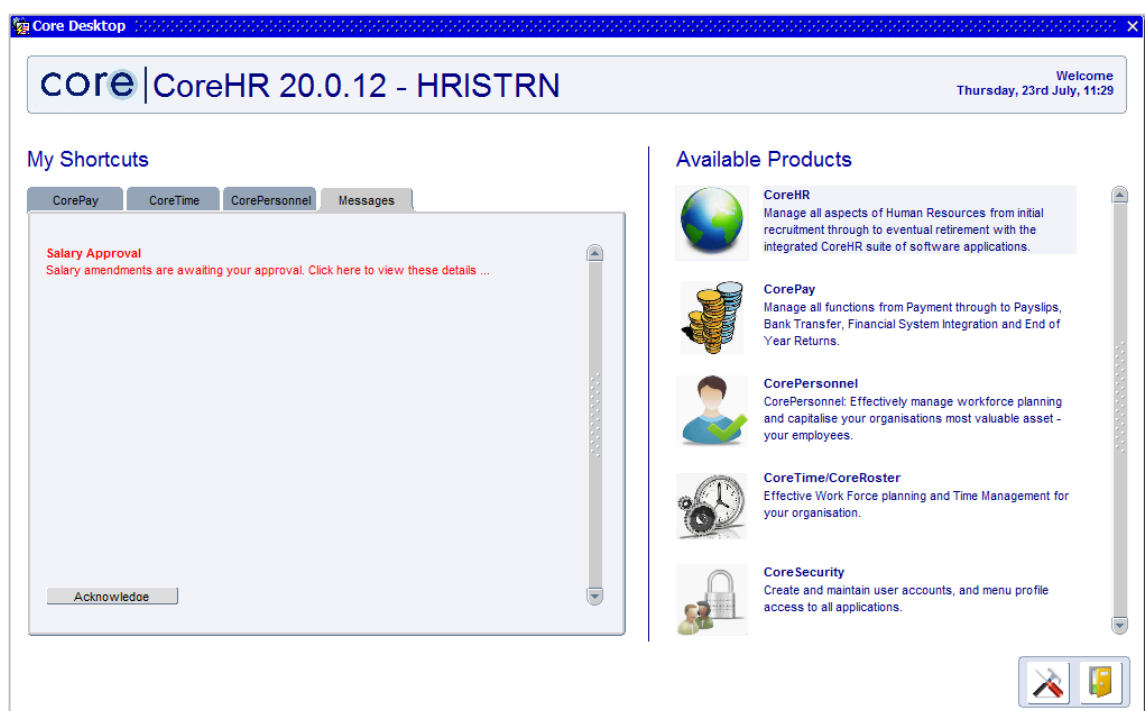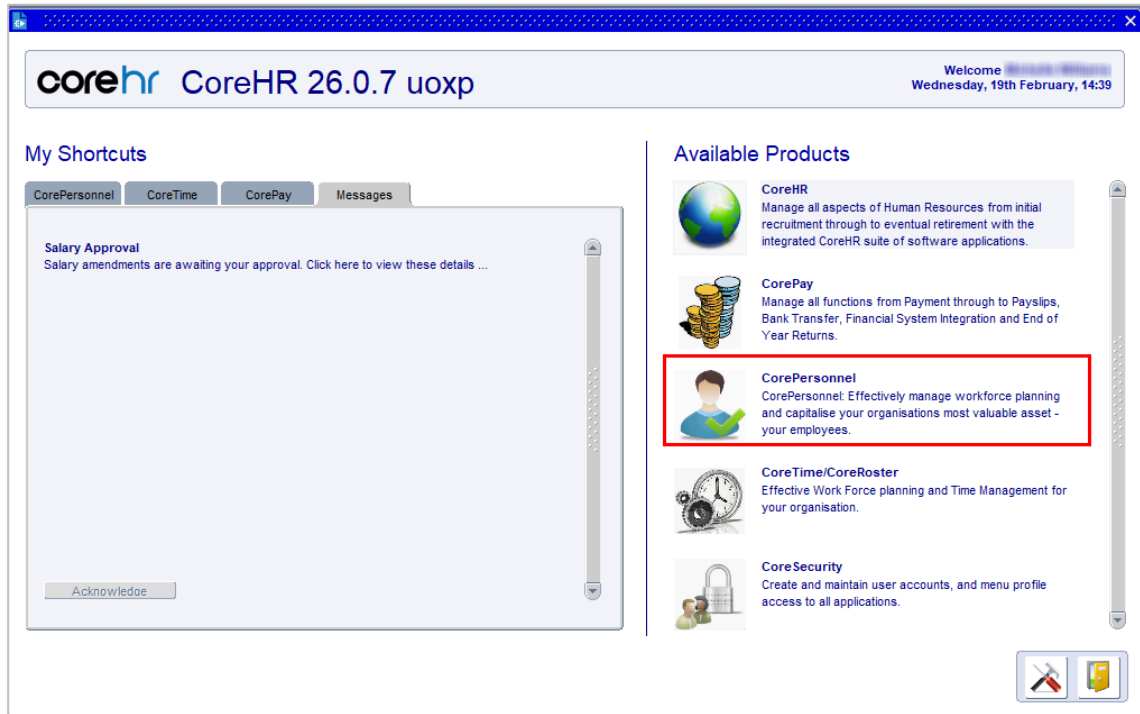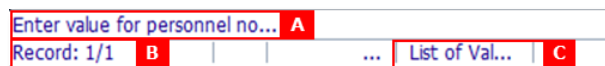**[B]** The number of the currently selected record, and how many records were returned in total.

[C] This will display if your cursor is in a field where you need to select from a LoV.
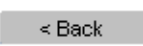
K. Key to Field Colours
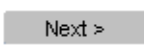
As you navigate around the Core application, you will notice that the fields can be one of two colours:

White: Generally this is an input field or a field you can click into in order to select a row of data.

Yellow: Fields with a yellow background will be automatically populated by the system and usually cannot be updated.

L. Entering Dates

Most date fields allow you to enter a date in one of 2 ways:

3. Click the [?] icon to view the calendar.

4. Use the `< Back` and `Next >` buttons to navigate to the correct month and click on the date you require.

Select Date

JULY			2010			
M	T	W	T	F	S	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

Click on any date to select it.

`< Back`   `Next >`   `Cancel`
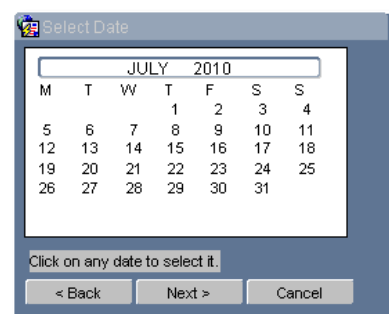
OR manually type the date in the following format: **ddmmmyy** e.g. for the *1st June 2015* you would type **01jun15** (when you move out of the field the system will automatically reformat it).

M. Viewing List of Value fields

To select an item from a List of Values (LoV) in Core:

1. Click the LoV button (this will be either next to the field or on the toolbar). The LoV dialogue box will display.

**2.** Not all the information will be visible. You can either scroll across / down or click and drag the bottom right corner of the dialogue box to make it larger.

3. Click on the required row and click [OK] to select the required value.

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N. Searching a List of Values

1. Click 🔵 to open the LoV dialog box.

2. Enter your search criteria into the Find bar at the top of the dialogue box (see below for further details of using wildcard characters).

3. Click the [Find] button. Your results will be displayed.

> 🔵 Alternatively, having opened the LoV dialog box as above, start typing the word you are looking for and the list will reduce to match your search.

4. Click on the required row and click [OK] to select the required value.

O. Using Wildcard Characters to search a List of Values

There is already a wildcard character (**%**) entered into the 'Find' field ready for you to use.

The **%** should be placed **before** your search criteria and will replace one or more letters/words that may appear before your search criteria. There is no need for a **%** after your search criteria.

Example 1. Vacancy ID List of Values:		
Enter	**Data found**	**Examples**
F	All entries beginning with the letter **F** (in the first column only).	Would find: **F**uture Technologies
%T	All entries containing the letter **T** anywhere in the row.	Would find: Finance J**T** Division
% Assistant	All entries containing the word **Assistant** anywhere in the row.	Would find: 100103 Office Assistant
Example 2. Cost Centre List of Values:		

ZW	All entries (names) starting with **ZW**.	Would find: ZW00000000000 to ZW99999999999 (generally GL codes).
%ZV	All entries containing **ZV** anywhere in the row (ie. within the description name or code).	Would find: the above entries **and** others such as: VFN**ZV**F00.0001 (generally project codes)

P. Key to Function Buttons/Icons

Icon	Function
	Edit Mode (click to switch to query mode)
	Click to execute query
	Click to switch to edit mode
	Previous Record
	Next Record
	Previous Field
	Next Field
	Save
	Clear from screen (does not delete)
	Delete Current Record
	Insert New Record
	Duplicate Previous Record (creating a new identical record)
	Display List of Values (LoV)
	Help
	Exit

5. Accessing Discoverer

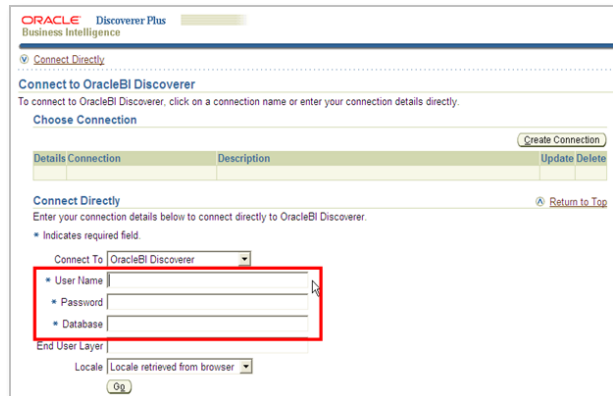1. Click on **LOGIN** under Discoverer. The *Log in window* opens:

2. Enter your **Username** (this will be the same as your Oxford Username e.g. admn1234).
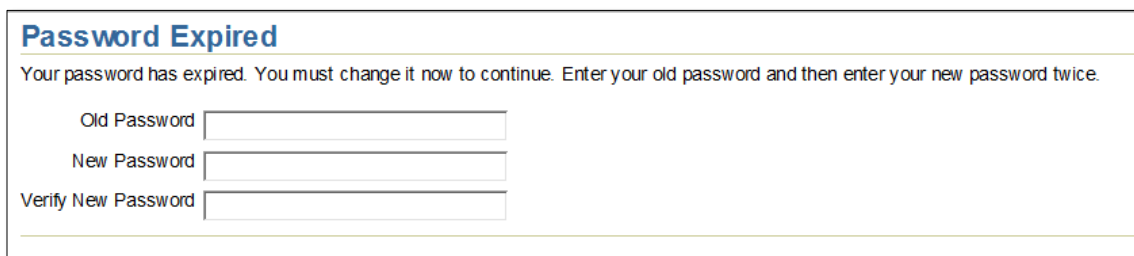
3. Enter your **Password**.

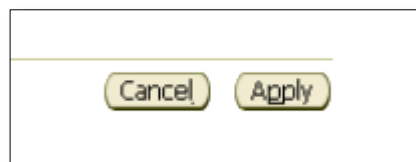4. Enter **UOXP** into the **Database**

5. Click **Go**.

> ⚠ To reset your password contact the HRIS Support Centre.

6. The first time you access the system with the password given to you by the HRIS Support Centre you will see this message:

Password Expired

Your password has expired. You must change it now to continue. Enter your old password and then enter your new password twice.

Old Password	
New Password	
Verify New Password	

7. Enter your old and new passwords as indicated:

Cancel Apply

8. **Note**: Passwords expire every 90 days. As you get close to this you will get a warning message when you log in e.g.

⚠ **Warning**
The password for this database account will expire soon. You may change your password now or you may continue and connect to Oracle BI Discoverer.

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> ⚠️ Passwords must be at least 8 characters long and contain at least one number and one letter.

9. Click **Continue** to connect to Discoverer without changing your password, or **Change Password** and follow steps 6 and 7 above.
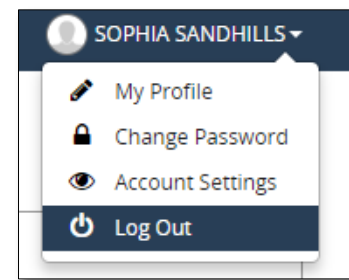

> ⚠️ If you do not change your password before it expires, you will be forced to change your password when you next try to log in.
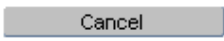
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6. Exiting the system

Q. CorePortal

From Staff Request pages click on ⊗ to go back to the home page, click on the dropdown menu under your name and select **logout**.

R. CoreHR back office: Exiting pages back to the main HR menu

In Core, you need to exit each screen individually in order to return to the main HR module menu. To exit a screen click the 🚪 icon on the toolbar OR if the toolbar is not available on a particular screen, click the [Cancel] button.

S. Exiting CoreHR back office

Once you have returned to the main Core home screen, if you wish to logout and exit the Core application:

1. Click on the 🚪 icon at the bottom right hand corner of the Core Desktop window. Core will close.

2. Close any remaining Oracle browser windows by clicking the ✖ in the top right corner of the browser.

> ⚠️ **NB:** Do not close your browser window without logging out properly.

T. Exiting Discoverer

1. To close the current report select **File** > **Close**.

2. To exit Discoverer select **File** > **Exit**.

3. For both options the following message will appear:

4. Click [Yes] .