NAV1 - Accessing & navigating CoreHR

There are two different areas of the system:

- **CorePortal** - web-based and is used for raising and approving Staff Requests.
- **CoreHR back office** where recruitment vacancies and personnel records are managed on a day-to-day basis.

This guide covers the following process steps:

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What’s changed?
Login changes following v26 phase 1 upgrade.
1. Accessing Staff Requests and the Back Office

Navigate to: http://www.admin.ox.ac.uk/personnel/usinghris/availability/

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

   ![Login Window]

   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
   
   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

   ![](warning.png)

   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. Accessing Staff Requests

1. Click on the **Quick Jump** menu at the top of the screen and select **Staff Requests**.

   ![Quick Jump Menu]

   Staff Requests
2. Click on ‘Staff Requests’

![Staff Requests](image)

**B. Accessing Core Back Office**

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

![CoreHR Back Office](image)

1. Click on the **CorePersonnel** tab

![CorePersonnel](image)

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

![Image of CoreHR interface]

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:
7. Enter your old and new passwords as indicated:

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]

   **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.

   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.

   ![Continue]

   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.
2. Exiting the system

D. 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.

E. 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 button.

F. 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.
G. 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**.

---

3. Searching for an employee record

**Navigate to: Back Office link > CoreHR Back Office > CorePersonnel**

1. Click on **Personal Profile**.

   ![Image](image1.png)

   If you are a salary approver you must first click **Acknowledge** on the salary approval message. See section 1 above.

2. The **Employee Search Window** opens:
3. Enter the personnel number (if known) or other search criteria e.g. last name and initials. The results will be shown in the Employee Detail section in the lower half of the screen.

4. If you want to carry out a more detailed search there is also an Advanced Search option. Click on ‘Advanced Options’.

5. The Advanced Search window opens:
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6. Enter your search criteria and click on Search. You will be returned to the Employee Search screen and the results will be shown in the Employee Detail section in the lower half of the screen.

4. Viewing person related details

Navigate to: Back Office link > CoreHR Back Office > CorePersonnel

1. Search for and open the relevant employee record. The Person Profile Maintenance window opens:

2. All employee related details can be accessed from this screen via the Select detail menu. For a full list see APPENDIX A.

5. Viewing appointments and appointment related details

Navigate to: Back Office link > CoreHR Back Office > CorePersonnel

1. Search for and open the relevant employee record. The Person Profile Maintenance window opens:

2. Select Appointment Details from the Select detail Menu.
The *Appointment Details* window opens (this will default to show current active appointments):

3. To view all or ended appointments click on the downward arrow against ‘My Current’ and choose either ‘All Appointments’ or ‘My Ended’.

4. To view the current appointment sequence click on the relevant appointment ID if applicable and then click on **View Appointment**.

5. To view Appointment related details click on **Appointment Details**. The post appointment Maintenance window opens:

6. All appointment related details can be access via the selection menu.
6. Working in CoreHR back office

H. 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).

[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.

I. 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.

J. 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 < Back and Next > buttons to navigate to the correct month and click on the date you require.
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).

**K. 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 to select the required value.

**L. 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 to select the required value.
M. 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:**

<table>
<thead>
<tr>
<th>Enter</th>
<th>Data found</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>F</td>
<td>All entries beginning with the letter F (in the first column only).</td>
<td>Would find: Future Technologies</td>
</tr>
<tr>
<td>%T</td>
<td>All entries containing the letter T anywhere in the row.</td>
<td>Would find: Finance JT Division</td>
</tr>
<tr>
<td>% Assistant</td>
<td>All entries containing the word Assistant anywhere in the row.</td>
<td>Would find: 100103 Office Assistant</td>
</tr>
</tbody>
</table>

**Example 2. Cost Centre List of Values:**

<table>
<thead>
<tr>
<th>Enter</th>
<th>Data found</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>ZW</td>
<td>All entries (names) starting with ZW.</td>
<td>Would find: ZW00000000000 to ZW99999999999 (generally GL codes).</td>
</tr>
<tr>
<td>%ZV</td>
<td>All entries containing ZV anywhere in the row (ie. within the description name or code).</td>
<td>Would find: the above entries and others such as: VFNZVF00.0001 (generally project codes)</td>
</tr>
</tbody>
</table>

N. Key to Function Buttons/Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Edit Mode (click to switch to query mode)</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Click to execute query</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>Click to switch to edit mode</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Previous Record</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Next Record</td>
</tr>
<tr>
<td><img src="image6.png" alt="Icon" /></td>
<td>Previous Field</td>
</tr>
<tr>
<td><img src="image7.png" alt="Icon" /></td>
<td>Next Field</td>
</tr>
<tr>
<td>Action</td>
<td></td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Save" /> Save</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Clear from screen" /> Clear from screen (does not delete)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Delete" /> Delete Current Record</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Insert" /> Insert New Record</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Duplicate" /> Duplicate Previous Record (creating a new identical record)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Display" /> Display List of Values (LoV)</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Help" /> Help</td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Exit" /> Exit</td>
<td></td>
</tr>
</tbody>
</table>
## O. Menu items

<table>
<thead>
<tr>
<th>Select detail menu (person)</th>
<th>Selection menu (appointment)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Detail</td>
<td>Planned Appointment</td>
</tr>
<tr>
<td>Appointment Details</td>
<td>Actual Appointment</td>
</tr>
<tr>
<td>Contacts</td>
<td>Amend Pay rate</td>
</tr>
<tr>
<td>Next of kin</td>
<td>Commence</td>
</tr>
<tr>
<td>Bank Details</td>
<td>End Appointment</td>
</tr>
<tr>
<td>Right to work</td>
<td>Amend Appointment</td>
</tr>
<tr>
<td>Other Person Details (UDFs)</td>
<td>Remove/amend end date</td>
</tr>
<tr>
<td>Qualification details</td>
<td>User Data</td>
</tr>
<tr>
<td>Immediately Prev. Employ</td>
<td>Comments</td>
</tr>
<tr>
<td>Equal Opportunities</td>
<td>Status Detail</td>
</tr>
<tr>
<td>View Employee Appointment</td>
<td>View Employee Appointments</td>
</tr>
<tr>
<td>End Employment</td>
<td>View Position History</td>
</tr>
<tr>
<td>Continuous Service</td>
<td>Pension</td>
</tr>
<tr>
<td>Address Maintenance</td>
<td>Cost Allocation</td>
</tr>
</tbody>
</table>