With read-only access there is a range of information you can view but not amend. However you are able to generate letters, forms and some contracts.

This guide covers the following process steps:

**A. View Employee details**
1. Personal Details
2. Contacts
3. Next of Kin
4. Bank Details
5. Immediately Previous Employment
6. Employee History
7. Right to Work Details
8. Other Details: Induction

**B. View Appointment Details**
9. Appointment summary
10. Probation details
11. Appointment detail
12. Cost Allocations
13. Appointment history
14. Leaving Reason

**C. View Salary Details**
15. Salary Details (summary)
16. Salary Details
17. Allowance Details

**D. Generating letters, forms and contracts**

**E. Table of documents available in CoreHR**

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What's changed?
Screenshots replaced following the implementation of Self-Service.

*September 18*
A. VIEW EMPLOYEE DETAILS

1. Enter employee’s name (and initial if needed) or personnel number if known.

2. Click Search.

3. Check the summary employee details to ensure you have found the correct employee, and then double-click in the Personnel Number field to open the record.

1. Personal Details

The Personal Profile Enquiry screen shows the basic details held about the individual:

The Personal Detail area shows the employee’s Address, NI number, Date of Birth etc.
Note: Ignore the Retirement Date. This does not reflect current legislation.

2. Contacts

2.1. To view additional contact details for the employee go to Select Detail > Contacts. Contacts such as work email, SSO etc will be added here automatically when they are created.

2.2. Additional Contact Types for the employee, e.g., home e-mail address may also be recorded and available to view.

3. Next of Kin

To view next of kin details for the employee go to Select Detail > Next of Kin.
4. Bank Details

To view bank details for the employee go to Select Detail > Bank Details.

5. Immediately Previous Employment

To view details for the employee go to Select Detail > Immediately Prev Employ.

Click to exit the Employment History Details screen.
6. Employee History

To view details for the employee go to Select Detail > Appointment Details > Appointment details > View Employee appointments.

This shows a summary of the individual’s appointments. To view further details about an appointment, ensure the relevant appointment is highlighted and then click on drill down or double click in any of the fields on the highlighted line.

The Appointment History view opens:

Use the scroll bar at the bottom of the screen to view additional details (displayed in the screen below).
Click \[ 
\] to exit the employment appointments screen.

7. **Right to Work Details**

7.1. Go to Select Detail box > Right to work.

7.2. Select the **Right to Work** UDF and click **View**.

7.3. The *User Data* window opens:
7.4. Click **Close** to exit the window.

8. **Other Details: Induction**

8.1. To view details for the employee go to **Select Detail > Other Person Details**.
8.2. Click on the relevant line then click view.

8.3. Click to exit the window.

**Note:** To exit the record click to get back to the Personnel main screen.

### B. VIEW APPOINTMENT DETAILS

#### 9. Appointment summary

9.1. Go to **Select Detail > Appointment Details** to open the Appointment Details window:

9.2. When the **Show** field is set to **My Current**, only current (active) appointments will be shown. To see all appointments (including those that have been ended) select **All Appointments**:
Explanation of details:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description/Notes</th>
</tr>
</thead>
</table>
| Appointment Status | An appointment can have any one of the following statuses:  
- Appointed  
- Commenced  
- Ended  
- Confirmed future |
| Appointment ID   | Whenever an individual is moved to a new appointment this will result in a new appointment ID.                                                      |
| Start Date       | Start date of appointment.                                                                                                                      |
| End Date         | End date of appointment (if the appointment is ended).                                                                                           |
| Department       | Department in which the appointment is held.                                                                                                     |
| Job Title        | Shows generic job title. See page 5 for details of how to view an actual job title.                                                              |
| Employment Status | An individual’s appointment may be:  
- Permanent  
- Fixed Term  
- Open Ended Externally Funded  
- Self-Financing  
- Variable Hours  
- Worker, i.e. casual  
- Non-employee |
| Substantive date | Where an individual has multiple appointments, one appointment (usually the earliest) will be the Substantive appointment. This is indicated by the latest date in the substantive column. |

10. Probation details

If probation dates have been entered they are shown under the Appointments area:
The probation date(s) shown relate to whichever appointment is highlighted. To view the dates for another appointment click into the Appointment ID or Start Date fields in the relevant row.

11. Appointment detail

11.1. Click View Appointment (or double click in the Appointment ID) to open the record:

11.2. As noted above, the Job Title is a generic title. To view the actual job title for an individual click on the Job Text button [A].

Explanation of some details:

<table>
<thead>
<tr>
<th>Field Name</th>
<th>Description/Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Sub Status</strong></td>
<td>An appointment may be:</td>
</tr>
<tr>
<td></td>
<td>• Full Time</td>
</tr>
<tr>
<td></td>
<td>• Part Time</td>
</tr>
<tr>
<td></td>
<td>• Full Time, Term-time only</td>
</tr>
<tr>
<td></td>
<td>• Part Time, Term-time only</td>
</tr>
<tr>
<td></td>
<td>• A-typical (Casual and Variable Hours)</td>
</tr>
<tr>
<td></td>
<td>• Non-employee</td>
</tr>
<tr>
<td><strong>Category</strong></td>
<td>Will be one of the following:</td>
</tr>
<tr>
<td></td>
<td>• Research only (1)</td>
</tr>
<tr>
<td></td>
<td>• Teaching and Research (2)</td>
</tr>
<tr>
<td></td>
<td>• Teaching only (3)</td>
</tr>
<tr>
<td></td>
<td>• Not an academic contract (4)</td>
</tr>
<tr>
<td></td>
<td>• Not applicable/not required (X)</td>
</tr>
</tbody>
</table>
RO Read Only access to Personnel

<table>
<thead>
<tr>
<th>Sub Category</th>
<th>This is the staff classification. A full list can be found on the Personnel Services website.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hours</td>
<td>The actual hours worked.</td>
</tr>
<tr>
<td>FTE Hours</td>
<td>Full time equivalent hours, depending on grade.</td>
</tr>
</tbody>
</table>

11.3. The **Action** and **Reason Code** [B] will show the last change made on the appointment.

**Note:** This is the latest sequence on the appointment. If no changes have been made since the employee was appointed the action will be NA – New appointment, with the relevant reason code. If changes have been made, the action and reason code will reflect the last activity (contractual change).

11.4. Click **OK** to close the window.

12. **Cost Allocations**

12.1. To view the cost allocations for an appointment go to **Select Detail > Appointment Details**.

12.2. If relevant, click into the **Post Number** to ensure the correct appointment is highlighted. Click **Appointment Details** button – **Post Appt Maintenance** window opens.

12.3. Go to **Selection > Cost Allocation** – the **Cost Allocations** window opens:

12.4. Click **Close** to exit the window.
13. Appointment history

To view the full history of the employees appointments go to Select Detail > Appointment Details > Appointment Details.

The post appointment maintenance window will open:

The Post and Planned Appointment sections show the details created from the staff request. (In some circumstances the details on the actual appointment can differ from the original planned appointment e.g. a higher scale point or lower FTE.)

From the selection menu click on 'View Employee Appointments'. The View Employee Appointments - Appointment summary window opens:
Click on the **Appointment ID** for the appointment you wish to view and click on Drill Down. The **View Employee Appointments - Appointment History** window opens for the appointment ID selected:

![Appointment History Window](image)

Use the scroll bar at the bottom of the screen to view further details (as shown in the screen shot below):

![Scroll Bar Details](image)

To exit, **red door** back until you reach the employee search screen.
14. Leaving Reason

14.1. When an Ended appointment is selected the leaving reasons will be shown:

14.2. As above, click [View Appointment] (or double click in the Appointment ID) to open the record to view details of the ended appointment.

Note: To exit the record click [OK] to get back to the Personnel main screen.

14.3. Click [OK] to close the window.

C. VIEW SALARY DETAILS

15. Salary Details (summary)

15.1. Go to Select Detail > Salary Details.

15.2. The Maintain HR Salary Amendments screen opens:
Note: If an employee has multiple posts in multiple departments you will only be able to see the salary details of the posts in your department.

15.3. When the view is set to **View Current Appointments** [A] only current (active) appointments will be shown. To view all appointments (including those that have been ended) select **View All Appointments**:  

15.4. If an individual has multiple appointments on display, click into the relevant **Appointments** line [B] to view the appropriate salary details in the table at the bottom of the screen.
16. Salary Details

16.1. To view more detailed salary information, ensure the correct appointment line is highlighted and click Salary Details.

16.2. The Salary Details window opens showing details of salary, increment details and a summary of allowance details:

![Salary Details Window](image)

16.3. Click Close to close the window.

17. Allowance Details

17.1. To view allowance information for a particular appointment, select the Allowance Details tab.

![Allowance Details Table](image)

17.2. As above, to view more detailed information, ensure the correct appointment line is highlighted and click Salary Details.

**Note:** To exit the record click to get back to the Personnel main screen.
D. GENERATING LETTERS, FORMS AND CONTRACTS

In order to generate documents from CoreHR you will need to have a document containing your department’s letterhead saved into a Coreapps folders on your C drive. Most departments submitted their letterheads to the project team when v20 was implemented.

**Note:** If you are a Data Service user you will need to check that the new appointment or changes have been processed before you generate the related letter, form or contract.

1. Search for and open the relevant employee record and go to **Select Detail** box > **Appointment Details**. The **Appointment Details** window opens.

2. If relevant, click into the Post Number to ensure the correct appointment is highlighted.

3. Click on the button. The **Post Appointment Maintenance** window opens.

4. Go to **Tools** > **Letters**. The **Generate Letters Module** window opens:

5. Letter Group defaults to ‘Post Appointments’ and must not be changed

6. Select Letter Type: as applicable (see table below)

7. Options will default to ‘Perform Mail Merge’ and must not be changed
8. Ensure current record is selected and click OK.

9. Choose ‘Open’ for prompts to appear

10. If you can’t see the prompt questions, minimise all screens to find prompt box

11. The Word document will open.

12. If the message below appears at the top of the page click on **Enable Content**.

13. Save the document in a secure location as a .doc or .docx file and Exit to return to CoreHR.

14. Close the window in your browser.

15. The system displays a message: ‘Did the letter print successfully?’ Click Yes.

**Note:** The above message will also appear if you re-open the document. Either click on **‘Enable Content’** or the ‘x’ on the right-hand side which will ensure that the macro will not re-run as it has now been disabled.

If you receive the message below, select ‘No’.

If the document is saved as a .docx you will not see the above Security Warning message when reopening a saved document.
### E. TABLE OF DOCUMENTS AVAILABLE IN COREHR

<table>
<thead>
<tr>
<th>Document</th>
<th>Module</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Conditional offer letter</td>
<td>e-Recruitment</td>
<td></td>
</tr>
<tr>
<td>Congregation form</td>
<td>e-Recruitment</td>
<td></td>
</tr>
<tr>
<td>Contract (various)</td>
<td>Personnel</td>
<td>Select the required contract template from the list. It is important that you select the correct contract template depending on the type of post. The template will be pre-populated with standard paragraphs in accordance with the data selected in the Employee Status and Sub Status fields. It is important that these have been completed accurately so the contract letter is appropriately populated.</td>
</tr>
<tr>
<td>Data collection form</td>
<td>e-Recruitment</td>
<td>The document will be populated with specific questions in accordance with your responses to the on-screen prompts. You must answer each of the additional questions carefully so the correct questions are included.</td>
</tr>
<tr>
<td>Equality and diversity form</td>
<td>Personnel</td>
<td>For direct appointments only. All other appointees will have provided equality data as part of their online application.</td>
</tr>
<tr>
<td>Pre-emp health questionnaire</td>
<td>e-Recruitment</td>
<td>When generating the questionnaire you must answer each of the additional medical questions carefully.</td>
</tr>
<tr>
<td>University card Form</td>
<td>e-Recruitment</td>
<td></td>
</tr>
</tbody>
</table>