

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.

What's changed?

Screenshots replaced following the implementation of Self-Service.

September 18

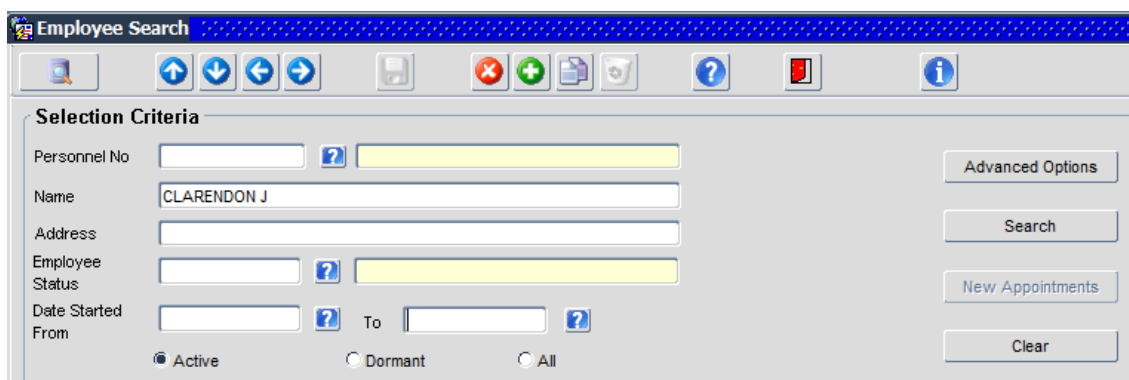
This guide covers the following process steps:

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Navigate to: Personnel > Enquiry > Personal Profile

A. VIEW EMPLOYEE DETAILS

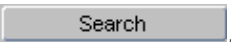
1. Enter employee's name (and initial if needed) or personnel number if known.

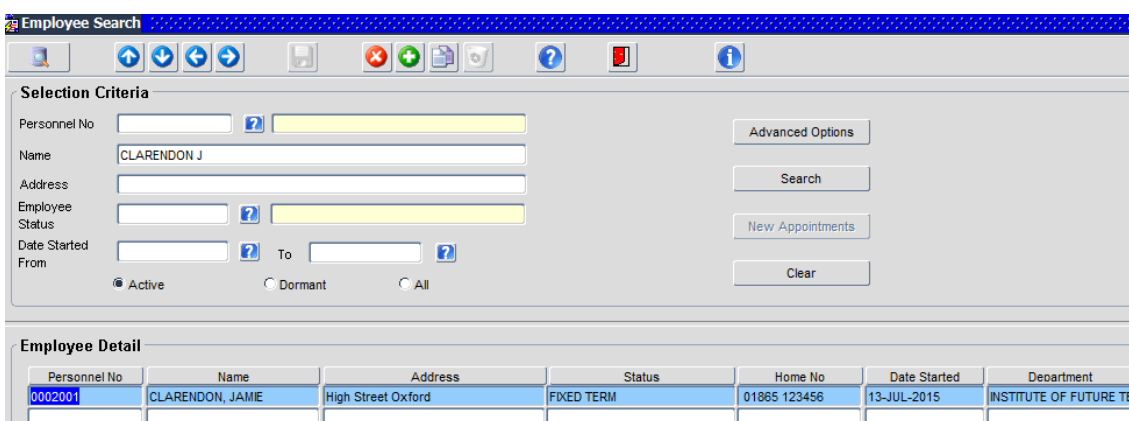


The screenshot shows the 'Employee Search' window. It has a toolbar with icons for navigation and actions. Below the toolbar is the 'Selection Criteria' section with the following fields:

- Personnel No: [Empty field]
- Name: CLARENDON J
- Address: [Empty field]
- Employee Status: [Empty field]
- Date Started From: [Empty field] To: [Empty field]
- Radio buttons: ☒ Active, ☐ Dormant, ☐ All

On the right side of the form are four buttons: 'Advanced Options', 'Search', 'New Appointments', and 'Clear'.

2. Click .



The screenshot shows the 'Employee Search' window after a search. The 'Selection Criteria' section is the same as in the previous screenshot. Below it is the 'Employee Detail' section, which contains a table with the following data:

Personnel No	Name	Address	Status	Home No	Date Started	Department
0002001	CLARENDON, JAMIE	High Street Oxford	FIXED TERM	01865 123456	13-JUL-2015	INSTITUTE OF FUTURE TE

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.

Personal Profile Enquiry

Person Profile

Personnel No. 0002001
Forename JAMIE
Surname CLARENDON

Select Detail

- 01 - Personal Detail
- 02 - Continuous Service
- 03 - Appointment Details
- 04 - Contacts
- 05 - Next Of Kin

Personal Detail

Known As JAMIE
Title MR Initials MJ
Qualification
Address Line1 High Street
Address Line2 Oxford
Address Line3
Address Line4
Address Line5
Post Code OX1 1AA
Country
NI number NE112233D
Phone No. 01865 123456
Nationality
Gender ☒ Male ☐ Female ☐ Unknown
Date Of Birth 25-DEC-1975 39.80
Retirement Date 25-DEC-2040
Marital Status NOT IN USE
Date Of Marriage
Previous Surname
Health
Insurance Name
Insurance No
☐ File Complete



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.

Personal Profile Enquiry

Person Profile

Personnel No. 0002001
Forename JAMIE
Surname CLARENDON

Select Detail

- 03 - Appointment Details
- 04 - Contacts
- 05 - Next Of Kin
- 06 - Bank Details
- 07 - Right To Work

Contacts

Contact Type	Contact
EMAIL - WORK	jamie.clarendon@fti.ox.ac.uk

- 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**.

Personnel No	Name	From Date	To Date	Employer	Position	Industry Category	Company Category
0002001	JAME CLARENDON	01-JAN-2014	10-JUL-2015	Oxford Technologies	Technician	OTHER PUBLIC SECTOR IN UI	

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.**

View Employee Appointments

Employee

Personnel No.

0002001

JAMIE CLARENDON

Drill Down

Appointment Summary

Appointment ID	Post Title	Appointment Status	Start Date	End Date	Post Type	FTE	Substantive Date	
CASUAL-19005	ZCW	CASUAL WORKER	Commenced	03-AUG-2015		WORKER	0.0000	
228803-2	TECH	TECHNICIAN	Commenced	13-JUL-2015		FIXED TERM	0.0000	13-JUL-2015

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:

[illegible]


Use the scroll bar at the bottom of the screen to view additional details (displayed in the screen below).

View Employee Appointments

Employee
Employee No. 0002001 JAMIE CLARENDON Status Report

Appointment History 228803-2

Post Number	Appointment Status	History	Department	Start Date	End Date	Target End Date	Pensionable Indicator	FTE
228803	2	Commenced	IE 5	13-JUL-2015		12-JUL-2017		0.0000

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**.

User Maintenance

Select User Defined Field
User Defined Field All

Source	User Defined Field	From Date	To Date	Description
Appointment	Appt.Induction	13-JUL-2015	14-JUL-2015	
Person	Right To Work	13-JUL-2015		Permanent (LIST A)

View Close

7.3. The *User Data* window opens:

7.4. Click  to exit the window.


8.1. To view details for the employee go to **Select Detail > Other Person Details**.

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- 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:

Appointment Status	Appointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Commenced	229000-1	01-AUG-2015		INSTITUTE OF FUTURE TECH	ADMINISTRATIVE SUPPORT	PERMANENT	01-AUG-2015

- 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**:

Appointment Status	Appointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Commenced	229000-1	01-AUG-2015		INSTITUTE OF FUTURE TECH	ADMINISTRATIVE SUPPORT	PERMANENT	01-AUG-2015
Ended	228736-2	01-JUL-2015	31-JUL-2015	INSTITUTE OF FUTURE TECH	ADMINISTRATIVE SUPPORT	PERMANENT	01-JUL-2015

Explanation of details:

Field Name	Description/Notes
Appointment Status	An appointment can have any one of the following statuses: <ul style="list-style-type: none"> • 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: <ul style="list-style-type: none"> • 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 screenshot shows the 'Appointment Details' form in the HRIS system. The form is divided into two main sections: 'Appointment Details' and 'Appointments'.

Appointment Details:

- Personnel No.: 0002002
- Forename: Louise
- Surname: Wallton
- Multiple Appointments Exist: ☐
- Show: My Current

Appointments:

Appointment Status	Appointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Commenced	228736-2	01-JUL-2015		INSTITUTE OF FUTURE TECH	ADMINISTRATIVE SUPPORT	PERMANENT	01-JUL-2015

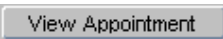
Below the appointments table, there are several fields for probation details:

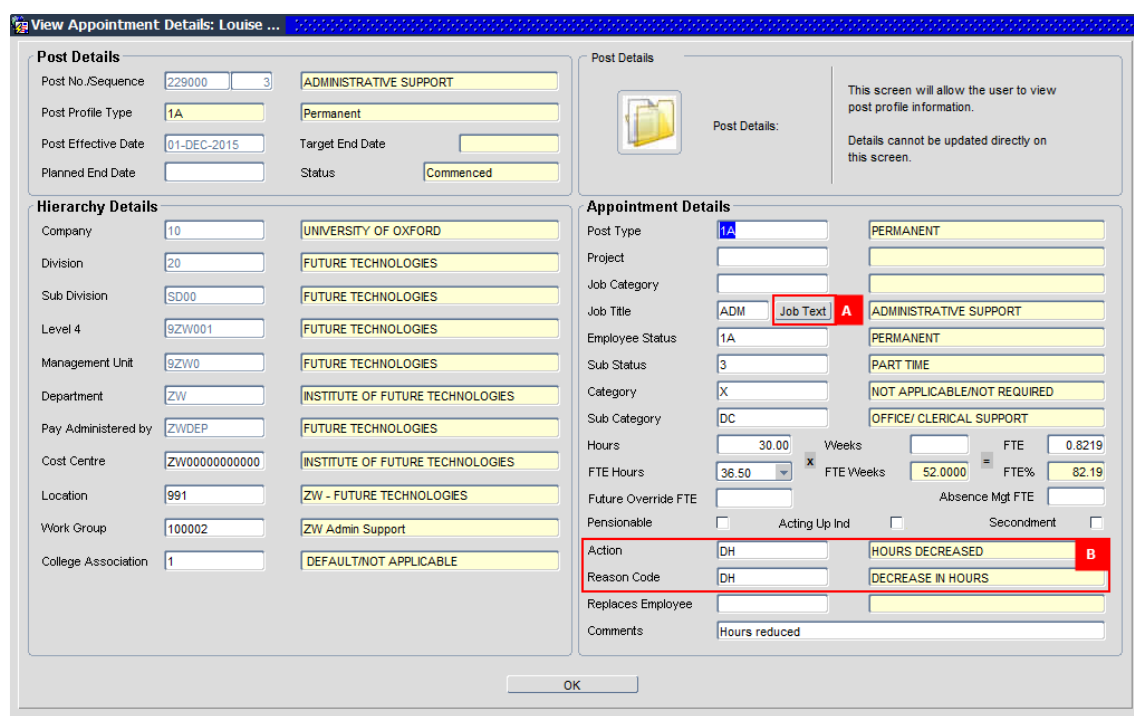
- Report To Manager: [Field]
- Fire Point: [Field]
- Internal Extension No: [Field]
- Leaving Code: [Field]
- Probation Expiry Date: [Field]
- Review Date 1: [Field]
- Review Date 2: [Field]
- Probation Extension Date: [Field]

A red box highlights the 'Probation Expiry Date', 'Review Date 1', 'Review Date 2', and 'Probation Extension Date' fields, with a red 'A' in the top right corner of the box.

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  (or double click in the Appointment ID) to open the record:



View Appointment Details: Louise ...

Post Details

Post No./Sequence: 229000 3 ADMINISTRATIVE SUPPORT

Post Profile Type: 1A Permanent

Post Effective Date: 01-DEC-2015 Target End Date: Status: Commenced

Planned End Date:

Hierarchy Details

Company: 10 UNIVERSITY OF OXFORD

Division: 20 FUTURE TECHNOLOGIES

Sub Division: SD00 FUTURE TECHNOLOGIES

Level 4: 9ZW001 FUTURE TECHNOLOGIES

Management Unit: 9ZW0 FUTURE TECHNOLOGIES

Department: ZW INSTITUTE OF FUTURE TECHNOLOGIES

Pay Administered by: ZWDEP FUTURE TECHNOLOGIES

Cost Centre: ZW0000000000 INSTITUTE OF FUTURE TECHNOLOGIES

Location: 991 ZW - FUTURE TECHNOLOGIES

Work Group: 100002 ZW Admin Support

College Association: 1 DEFAULT/NOT APPLICABLE

Appointment Details

Post Type: 1A PERMANENT

Project:

Job Category:

Job Title: ADM Job Text A ADMINISTRATIVE SUPPORT

Employee Status: 1A PERMANENT

Sub Status: 3 PART TIME

Category: X NOT APPLICABLE/NOT REQUIRED

Sub Category: DC OFFICE/ CLERICAL SUPPORT

Hours: 30.00 Weeks: FTE: 0.8219

FTE Hours: 36.50 FTE Weeks: 52.0000 FTE%: 82.19

Future Override FTE:

Absence Mgt FTE:

Pensionable: Acting Up Ind: Secondment:


Action: DH HOURS DECREASED B

Reason Code: DH DECREASE IN HOURS

Replaces Employee:


Comments: Hours reduced

OK

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

Explanation of some details:

Field Name	Description/Notes
Sub Status	An appointment may be: <ul style="list-style-type: none"> • Full Time • Part Time • Full Time, Term-time only • Part Time, Term-time only • A-typical (Casual and Variable Hours) • Non-employee
Category	Will be one of the following: <ul style="list-style-type: none"> • Research only (1) • Teaching and Research (2) • Teaching only (3) • Not an academic contract (4) • Not applicable/not required (X)

Sub Category	 This is the staff classification. A full list can be found on the Personnel Services website .
Hours	The actual hours worked.
FTE Hours	Full time equivalent hours, depending on grade.

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

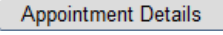


Note: This is the latest sequence on the appointment. If no changes have been made since the employee was appointed the action will be NA – New appointment, with the relevant reason code. If changes have been made, the action and reason code will reflect the last activity (contractual change).

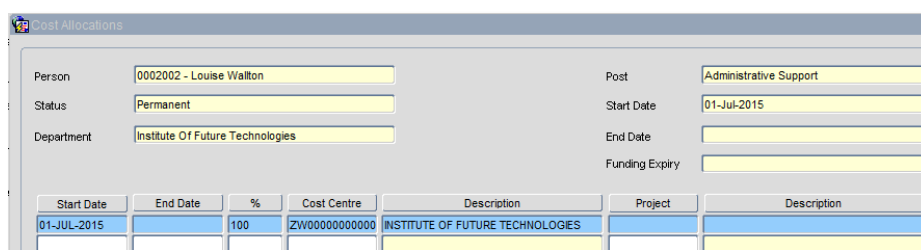
11.4. Click  to close the window.

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  button – *Post Appt Maintenance* window opens.

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



12.4. Click  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:

Appointment ID	Post Title	Appointment Status	Start Date	End Date	Post Type	FTE	Substantive Date
229000-1	ADM ADMINISTRATIVE SUPPORT	Commenced	01-AUG-2015		PERMANENT	0.8219	01-AUG-2015
228736-2	ADM ADMINISTRATIVE SUPPORT	Ended	01-JUL-2015	31-JUL-2015	PERMANENT	1.0000	01-JUL-2015

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:

[illegible]

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


View Employee Appointment...

Employee

Employee No.

Appointment History 229000-1

Post Number	Appointment Status	History	Pay Scale	Department	Start Date	End Date	Target End Date
229000	2 <input type="text" value="Commen..."/>	<input type="checkbox"/>	05S STANDARD GRADE 5	ZW INSTITUTE OF FUTURE TECHNOLOG	03-AUG-2015		
229000	1 <input type="text" value="Ended"/>	<input type="checkbox"/>	05S STANDARD GRADE 5	ZW INSTITUTE OF FUTURE TECHNOLOG	01-AUG-2015	02-AUG-2015	

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:

Appointments

Appointment Status	Appointment Id	Start Date	End Date	Department	Job Title	Employee Status	Substantive Date
Ended	228679-1	05-MAR-2011	04-MAR-2012	INSTITUTE OF FUTURE TECH	FINANCE	FIXED TERM	05-MAR-2011

Report To Manager	<input type="text"/>	<input type="text"/>	Probation Expiry Date	<input type="text"/>
Fire Point	<input type="text"/>	<input type="text"/>	Review Date 1	<input type="text"/>
Internal Extension No	<input type="text"/>	<input type="text"/>	Review Date 2	<input type="text"/>
Leaving Code	<input type="text" value="220"/>	<input type="text" value="DISMISSAL: REDUNDANCY/END FTC"/>	Probation Extension Date	<input type="text"/>
Leaving Destination	<input type="text" value="21"/>	<input type="text" value="NOT IN REGULAR EMPLOYMENT"/>	Extension Reason	<input type="text"/>
Location After Leaving	<input type="text" value="1"/>	<input type="text" value="ENGLAND"/>	Probation Completion Date	<input type="text"/>
Ending Reason	<input type="text" value="END OF FIXED TERM CONTRACT"/>			

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 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.

Select Detail

- 10 - Immediately Prev. Employ
- 11 - Equal Opportunities
- 12 - Leaving Reason
- 13 - Salary Details**

15.2. The Maintain HR Salary Amendments screen opens:

Maintain HR Salary Amendments

Personnel No: 0002002 LOUISE WALLTON
Pay Group: 20 University Monthly

View Options: Appointment Salary Details [A] View Current Appointments
Salary Detail
Allowance Details
Amend Pay Group

Include Outstanding Approvals ☐

Buttons: Approve Salary Details Add Search Clear

Appointments

Start Date	End Date	Appointment Id	Status	Job Title	Post Type	FTE	Rate Of Pay	Allowances
01-AUG-2015		229000-1	COMMENCED	ADMINISTRATIVE SUPPORT	PERMANENT	0.8219	24775.00000	

Salary Details Allowance Details Show Outstanding Show Rejected Overseas Salary

Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason
05-AUG-2015	13-AUG-2015	01-AUG-2014	05S	Standard Grade 5	2 Annual	24775.00000	.821900	20362.57250	Approved	GENERAL
03-AUG-2015	06-AUG-2015	01-AUG-2014	05S	Standard Grade 5	2 Annual	24775.00000	.821900	20362.57250	Approved	DECREASE
01-AUG-2015	31-JUL-2015	01-AUG-2014	05S	Standard Grade 5	2 Annual	24775.00000	1.000000	24775.00000	Approved	RE-GRADU



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**:

Maintain HR Salary Amendments

Personnel No: 0002002 LOUISE WALLTON
Pay Group: 20 University Monthly

View Options: Appointment Salary Details View All Appointments
Salary Detail
Allowance Details
Amend Pay Group

Include Outstanding Approvals ☐

Buttons: Approve Salary Details Add Search Clear

Appointments [B]

Start Date	End Date	Appointment Id	Status	Job Title	Post Type	FTE	Rate Of Pay	Allowances
01-AUG-2015		229000-1	COMMENCED	ADMINISTRATIVE SUPPORT	PERMANENT	0.8219	24775.00000	
01-JUL-2015	31-JUL-2015	228736-2	ENDED	ADMINISTRATIVE SUPPORT	PERMANENT	1.0000	23386.00000	

Salary Details Allowance Details Show Outstanding Show Rejected Overseas Salary

Effective Date	Input Date	Rate Effective	Pay Scale	Point	Rate Type	Rate Of Pay	Multiplier	Actual Pay	Status	Reason
01-JUL-2015	31-JUL-2015	01-AUG-2014	04S	Standard Grade 4	5 Annual	23386.00000	1.000000	23386.00000	Approved	NEW STAR

- 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 for Appointment 229000-1

Personnel No.

Effective Date Enquiry Date

Rate

Date Input Rate Of Pay Annualised Pay

Pay Rate Type Multiplier

Pay Scale Actual Pay Actual Annualised Pay

Point Total Salary (incl. Allowances)

Comments

Increment Details

Increment Due Date Comments

Qualification Ind ☐

Increment Hold Ind ☐

Allowances

Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason

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.

Status	Allowance	Allowance Type	Scale Point/ Percentage	Value	Annual Value	Start Date	End Date	Reason
Approved	Misc Pens Payment	Variable Value		213.78	2585.36	01-AUG-2010		

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.

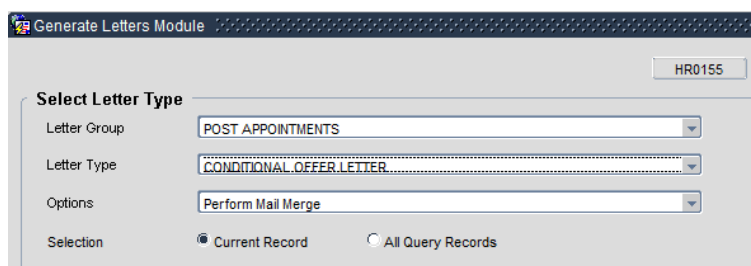
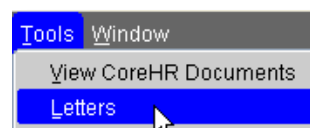
D. GENERATING LETTERS, FORMS AND CONTRACTS

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.

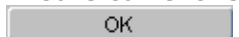
1. Search for and open the relevant employee record and go to **Select Detail** box > **Appointment Details**. The *Appointment Details* window opens.
2. If relevant, click into the Post Number to ensure the correct appointment is highlighted.
3. Click on the **Appointment Details** button. The *Post Appointment Maintenance* window opens.
4. Go to **Tools > Letters**. The *Generate Letters Module* window opens:



The screenshot shows the 'Generate Letters Module' window. It has a title bar with a small icon and the text 'Generate Letters Module'. In the top right corner, there is a text box containing 'HR0155'. Below this, there is a section titled 'Select Letter Type' which contains three dropdown menus: 'Letter Group' (set to 'POST APPOINTMENTS'), 'Letter Type' (set to 'CONDITIONAL OFFER LETTER'), and 'Options' (set to 'Perform Mail Merge'). At the bottom, there is a 'Selection' section with two radio buttons: 'Current Record' (which is selected) and 'All Query Records'.

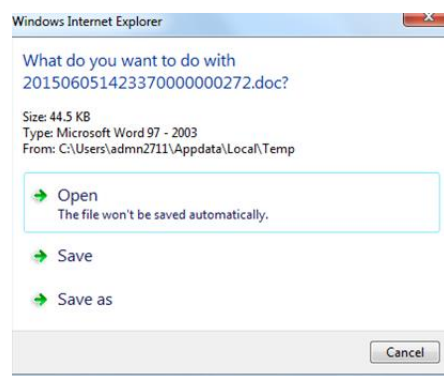
5. Letter Group defaults to 'Post Appointments' and must not be changed
6. Select Letter Type: as applicable (see table below)
7. Options will default to 'Perform Mail Merge' and must not be changed

8. Ensure current record is selected and click



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.

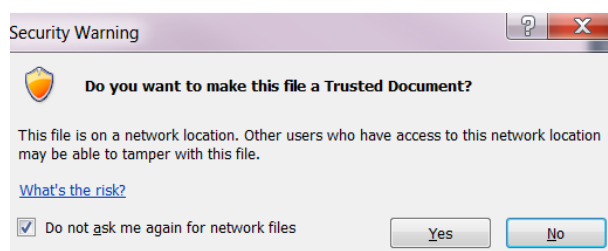
14. Close the window in your browser.

15. The system displays a message: 'Did the letter print successfully?' Click .



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

Document	Module	Notes
Conditional offer letter	e-Recruitment	
Congregation form	e-Recruitment Personnel	
Contract (various)	Personnel	<p>Select the required contract template from the list. It is important that you select the correct contract template depending on the type of post.</p> <p>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.</p>
Data collection form	e-Recruitment Personnel	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.
Equality and diversity form	Personnel	For direct appointments only . All other appointees will have provided equality data as part of their online application.
Pre-emp health questionnaire	e-Recruitment Personnel	When generating the questionnaire you must answer each of the additional medical questions carefully.
University card Form	e-Recruitment Personnel	