What's new in People Management?

University **HUMAN RESOURCES** OXFORD

This document outlines the key differences between the previous Personnel module in the Back Office and People Management in the Portal (in version 28). It does not cover any system process guidance; please refer to the new support materials for guidance on how and what to enter in the system.

1.   All dashboards in the Portal - Navigation

Drop-down fields with large selections

Reminder/for attention of users who are new to the Portal: Drop-down fields that contain a large selection of options can take a long time to display/load. For efficiency, start typing the value you need, instead of clicking on the drop-down menu. This is especially useful when populating data in the following fields: Cost Centre, Location and Work Group.

Saving changes

You won't be prompted to save changes - please always remember to do this, otherwise changes will be lost. When you click '**Save**', a green confirmation notification appears, with a green line beneath - this is a timer. You must wait for it to complete, before leaving that screen, or executing further actions.

Details updated successfully	Details updated successfully

2.   Create New Person wizard

Field visibility, labels and location

Field visibility

Many fields that were not in use in Personnel have now been removed or hidden from view, for simpler navigation and data input. This includes 'Marital Status', 'Nationality', 'Health Insurance No.' etc.

NB The 'Create New Starter' button is now visible upfront, ie **before** a duplicate employee search is performed. Refer to the new guides for further details on using this.

Field labels

Certain field labels have changed, as follows:

- 'Start date' is now 'Effective date'
- 'Job Text' is now 'Job Description'
- 'Hours' is now 'Contracted Hours'
- 'FTE Hours' is now 'Standard Hours'
- 'FTE weeks' is now 'Standard weeks'
- Salary pay scale now includes 'NSP' (National Spine Point)
- 'Salary comments' is now 'Comments' (in 'Contract Information' in the wizard)

Field location

Some fields have moved to a different placement. For example, the comments box appears at the top in some screens, and age is now in 'Personal Information' of the wizard, not in the salary section. NI number is now in the Salary section.

NB 'Previous surname' field is now under Diversity information and is only visible to those with relevant access.

Pre-populated data

The initials will be pre-populated with all of the names entered, not just the first and middle names. These should be overwritten, as per the updated/new guidance.

The age will auto-populate from the entered date of birth.

Add Qualification area

Only the name of the qualification is available in the Portal, and **not the code** associated with it. However, you will be able to find it in the relevant reports.

3. UDFs

All UDFs are now located in one place. Appointment UDFs are prefixed with 'Appt.', Person UDFs are not prefixed with anything.

NB To find a particular UDF, start typing any part of the UDF title in the search (UDF type).

Previously, certain fields that are mandatory for policy reasons weren't mandatory in the system. These are now also mandatory in CoreHR.

4. Approving salaries and allowances

Approvals with the status of 'Pending' can be deleted, if required, before they are approved.

There is a new additional status now – 'In approval', which is set after a departmental/divisional Approver approves the change. The status then updates to 'Approved' once Payroll have approved it.

5. Recording new appointments/starters

There are a few different routes to recording new appointments and starters in People Management. Whilst the steps may seem intuitive, the labels/buttons don't always correspond with what you may think needs to be clicked/followed next. This can result in errors. To avoid this, please always check the appointing route that you must follow by starting with the Appointing – where to start guide. This will be crucial to use until you become more familiar with People Management.

6.   Appointment changes

- You can only make changes to an appointment once it has been 'commenced'.
- All sequences for the chosen appointment are now displayed by default in the Contracts section. **You can now insert a new appointment sequence between the current active sequence and a future dated sequence,** which wasn't previously possible. Please see the new guide.
- There are no longer 'Planned' or 'Actual Appointment' views. The only place to view the grade on an appointment is in the Salary screen.
- Additional appointments: be careful **not to exceed FTE of 1**, as a warning message no longer appears.

7.   Change to status terminology

Within the contracts section of a person record the statuses will now appear, as follows:

- Pending (instead of Appointed);
- Started (instead of Commenced);
- Future (instead of Confirmed Future)
- 'Pending' in the salary screen instead of 'Outstanding'.

8.   Ending multiple appointments

When ending multiple appointments you no longer need to end these in a certain order as was required in the Back Office. A substantive appointment can now be ended last, without it affecting the leaving date. Please refer to the updated guidance.

9.   Generating documents – now all in the Portal

All currently available document templates have been moved to the Portal. Please refer to the new guides on how to generate letters and forms.

10.   New system guidance

Following user feedback and some consultation, we have completely overhauled our system guidance, which we hope you will agree has improved. Most of the guidance is now in the form of **How-to guides** and **Scenario Factsheets**. How-to guides provide standard guidance on the system steps in CoreHR, whereas Scenario Factsheets provide guidance on specific situations/system tasks, mainly focusing on what needs to be entered into the fields.

NB Whilst the system is intuitive, we would urge you to always refer to the user guides to avoid errors and for current information.

11.   Known issues and common queries

Please visit the [Known Issues](#) and [Common Queries](#) pages for the latest issues and information about the system.