What’s new in v26

PHASE 1
Document purpose

This document highlights the functionality changes introduced in phase one of the CoreHR Upgrade project (move to v26). Some changes relate to the look and feel of the system, whilst others affect data entry. The majority of changes relate to the new Staff Request form and approval process, however, there are also some minor changes in the back office.

Other supporting documentation

The following supporting materials have been created / revised to include the v26 changes:

Department users:
- RQ1_ Creating and Approving a Staff Request
- Recording Cost Allocations in CoreHR
- NAV1 Accessing and Navigating CoreHR
- IP4 Running Reports
- Frequently Asked Questions from webinars
- Webinar recording

Self-Service:
- Employee Self-Service How-To Guide
- Manager Self-Service How-To Guide
- Understanding Your Online Payslip

As the changes in the back office are very minor, you should continue to use the existing v20 guides until these are updated as part of phase 2 of the project.

What is changing in phase one?

The system functionality changes highlighted in this document have been categorised by different areas of the system, as follows. If a system area is not listed, there are no changes which you need to be aware of.

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Navigation

1. Logging in to Discoverer (Reporting)

   - The **Database** name is now UOXP.
   - If you are able to login to Discover but are unable access reports, see [Trusted sites](#).

2. Navigating to Back Office (from the Portal)

   a. Use the **Quick Jump** menu from the top of the portal screen. Either scroll down to the **CoreHR Back Office** option; or start typing ‘back office’.

   b. Click anywhere in the area highlighted blue / click **Enter** on your keyboard.

   **NB** As the Back Office screen loads you will see the following message; click **Continue** to proceed further.
3. Navigating to Staff Requests (from the Portal)

a. Use the Quick Jump menu from the top of the portal screen. Either scroll down to the Staff Requests dashboard; or start typing 'Staff Requests'.

b. Click anywhere in the area highlighted blue / click Enter on your keyboard.

c. Select Staff Requests.
Staff Requests

When creating / approving a Staff Request for the first time in v26 we strongly advise that you follow the fully revised QRG, available from the Using HRIS website. The following highlights the key changes and does not include system instructions, all of which are included in the updated QRG.

1. Staff Request Wizard

   - Navigate to each numbered step of the wizard by:
     - Clicking on the headings eg Contract Details or;
     - Using the Previous and Next buttons.

2. Cost Centre and Location (Staff Request Wizard: 1. Position).

   - For fields which have vast number of options, instead of scrolling through the values, which will take a significant amount of time to load, type the first few characters and select the required option.

   - (Reminder: This is the default GL coding for the department).
3. Budgeted field (Staff Request Wizard: 2. Contract Details)

- Budgeted is now a Toggle button.

4. Job Title Text (Staff Request Wizard: 3. Job Details)

- Employee’s Actual Job Title must be typed into the **Job Title Text** field (this was entered in the **Job Description** field in v20 and has been removed in v26).

5. Cost Centre and Project (Staff Request Wizard: 7. Cost Allocation)

- When clicking into either of these two fields, a search window appears.
- Either type in the coding or the description.
- (Reminder: this is where you expect the salary to be costed to).

- When the Cost Centre and Project Code fields are populated, you can now only see the first half of the coding string, you can see the code but not the description. Unlike v20 you can’t click into the field and scroll across to view the full details.

6. Mandatory fields

- Fields marked as mandatory in the QRG, are now mandatory on the Staff Request form.
- This means that there are more mandatory fields in v26. Therefore approvers reviewing any Staff Requests which were submitted in v20, and are still awaiting approval, will receive an error message. Refer to the HRIS Support Centre for guidance.
7. Fields have been removed

- We have removed, where possible, fields which were previously not in use. See list below:
  - Manager Order Number
  - Vacancy Reason
  - Replacing Employee
  - Reporting To
  - Assign Approver

8. Staff Request Approval and Rejection

As previously communicated the Staff Request approval process changes in v26 (see email to Key Contacts dated 15 November 2018, reminder in November 2018’s HRIS bulletin and the email to all CoreHR users 24 April 2019). Departments with multiple approvers were are advised to think ahead about how they would manage this change, eg establishing separate approvers for certain requests.

The guidance has been fully updated in the RQ1 Creating and Approving a Staff Request QRG and should therefore be followed when submitting and reviewing Staff Requests.

- Staff Request creators no longer select an individual to approve / reject the Staff Request.
- When rejecting a request, approvers no longer have the option to ‘Allow Edit’.
Personnel

1. Name and address case in Back Office affects HR Self-Service

- When entering / updating the Forename, Surname or Address in the Back Office, this no longer defaults to uppercase.
- The text will appear in HR Self-Service as you type them in the Back Office, we recommend capitalising each word so that it appears correctly in correspondence generated from the system.
- No other fields are affected.

2. Sorting on View Position History screen

- Appointments are now ordered in reverse chronological order, e.g. from most recent to the oldest.
- Allowances are now ordered in reverse chronological order.
3. Rejected allowances

- By default the Allowance Details tab on the View Position History screen now includes all allowances, which are ‘Outstanding’, ‘Approved’ and ‘Rejected’.

- To only see allowances which have been approved, untick the ‘Include Outstanding Approvals’ tick box.

4. Aesthetic differences (which can be ignored)

**Brackets in the Appointment Status on Posts tab**

Cosmetic change, serves no purpose.
**Search by Cost Centre on Posts tab**

Additional way of searching for posts, we recommend you always search by **Post Number** for speed and accuracy.

![Image of search by cost centre](image)

**Exclude from Occupational Absence on Appointment Details screen**

We are not using the system to record this information, so please don't tick this box.

![Image of exclude from occupational absence](image)

**Substantive Date on View Position History screen**

The Substantive Date is used by the system to confirm when (if appropriate) the appointment became the substantive appointment.

![Image of substantive date](image)
Discoverer and reporting

1. Number of rows displayed

- When viewing a report in Discoverer, it will now default to displaying the first 10,000 rows of data (previously the default was 250 rows).

- If exporting the data to Excel, the system will continue to export all rows.

2. Payroll costing report

- An additional column, named Element Code, has been added to the monthly payroll costing report (which is sent to nominated individuals via a central distribution list).

- If you do receive this report and have created formulas / VLOOKUPS etc, please bear this in mind as you may need to make adjustments.

- Currently the description of the Element is included in the report and refers to the type of payment or deduction for that row of the report eg ‘Acting Up Allowance NP’.

- For every element there is a unique code used by the system, see examples of the Element Codes used for allowances over the page.
3. Trusted sites

If you are able to login to Discover but are unable access your reports (this guidance assumes you were able to access reports in v20), it may be that you need to record the new database URL to your Trusted Sites, see guidance below. If this does not resolve the issue please contact the HRIS Support Centre.

**Part 1: Control Panel**

1. Navigate to the **Control Panel**, from the Start Menu on your PC.
2. Choose **Java (32-bit)**.
3. Select the **Security** tab.
4. Click **Edit Site List**.
5. Click Add.
7. Click OK.

**Part 2: Internet Explorer**

1. Open Internet Explorer.
2. Open the Settings menu.
3. Select Internet options.
5. Select Trusted Sites and then Sites.
7. Click Add.
8. Click Close.
Self-Service

1. Payslip

- The payslip generated in v26 contains the same information as v20, however the look and layout is very different.

2. Employee and Manager Self-Service

- The same information can be found in both v20 and v26, however the layout is slightly different and the images have been updated.

- Click corehr to return to the homepage.
### Known issues

We are aware of some issues with CoreHR v26 which are being reviewed and will be addressed as a priority. Please see details below:

#### 1. Retirees and Contract ending statistics

- These figures are not calculated according to University policy and should therefore be ignored.

#### 2. Planned Pay Details Note Required tick box

- There is a new tick box on the Appointment Details screen, which must NOT be ticked. Ticking this box can cause the individual to be paid incorrectly.

If you notice any other cosmetic differences that do not affect your use of the system, you can ignore them. However, for further clarification please contact the HRIS Upgrade project team by emailing corehrupgrade@admin.ox.ac.uk.