

Ulster Staff Portal

Welcome to the new HR 'Employee Self Service'

This is a secure online system which will provide you with full access to the CoreHR/Payroll system to maintain all your personal information such as your home address, emergency contact and banking details. You will also have the facility to view your current appointment details and review your payslips online.

Over the first year of the implementation of this staff Portal, we have added new functionality such as 'online leave requests' and 'online leave authorisation' and 'online course Booking'.

In 2017 we will be introducing the HESA screens to enable staff to enter their own details, for this annual Staff return.

This system is also available on your smartphone or tablet using Core Mobile.

Getting started:

1 – Signing into Employee Self Service:

Log into the Ulster Portal in the normal way using your AD login details and you will see the new channel on the next page, under the 'Staff Services' tab. We have also added an Icon at the top left to make this even more accessible.

Over the course of 2016 we have moved Employee self-service to 'Single Sign On'. This means that once you sign into the University Portal, you can either select the icon on the top left or the link in the 'employee self-service channel' and you will not have to sign in again as you have already signed in.



Corporate Applications - Quick Links



Employee Self Service



Online Mileage & Prior Approval



e5: Procurement Portal



e5: Other Modules



Barclay Card Spend MGT

Finance



Click on headings to view further information:

- ▶ [e5](#)
- ▶ [On-line Mileage and Prior Approval](#)
- ▶ [Barclaycard Spend Management](#)
- ▶ [Finance Links](#)

HR and Payroll - Employee Self-service



CoreHR - Employee Self-service

This secure online system provides full access to enable you to maintain all your personal information such as home address, emergency contact and banking details. You also have the facility to view your current appointment details and review your payslips and P60's online.

Since April 2016, online leave requests and leave approval have been added. We are still in the pilot stage with this functionality but it should all be in place properly for the 16/17 academic year.

The **Online Course booking tool is now live**, please familiarise yourself with the [user guide](#) before using the tool.

Coming soon - HESA update

HR Employee Self-service Login

Sign on to ESS is with the same username and password you use to get access to the portal. Once you sign into the portal you will be authenticated to ESS also.

- [Employee/Manager Self-Service Guidance Notes and FAQs](#)
- [Annual Leave User Guide for Staff and Line Managers](#)
- [EO Employee Self-service guide](#)
- [Online Course booking Step-by-Step Guide](#)

In addition to the HR website, a copy of this **'FAQ and help guide'** will also be available here.

2 – Assessing Dashboards

Employee Dashboard

All employees will have access to the following screen which is the **'Employee Dashboard'**.

N.B. if you are a Line Manager, you will automatically default to the **'Manager Dashboard'**. Further details on the functionality available on this Dashboard can be found on page 6 of this document.

The screenshot displays the Employee Dashboard interface. At the top right, there is a profile section showing a 100% profile completeness bar and a 'My Profile' button. The main content area is divided into several sections: a left sidebar with a 'Dashboard' icon circled in red and a 'Pay' icon; a central 'My Appointments' section for ID 101827-1, showing 'Hr Administrative Systems M...', 'Human Resources Directorate Department', '1 FTE', and '01 Feb 2003 Start Date'; and a right 'What If' calculator. The calculator allows selecting a reduction type (FTE % or Weeks), entering a revised FTE value of 1, and clicking a 'Calculate' button. Below the calculator, it states 'Data provided subject to Terms and Conditions'. At the bottom, an 'Important Dates' section shows 'Pay Day' on August 27 (Today) and 'Time Off' as 'None Booked'.

On the Employee Dashboard you will be able to see basic details relating to your current appointment(s).

You can use the **'What if'** calculator to see how changes to your FTE would affect your Pay.

'Leave Authorisation' has also been introduced, enabling you to check on your annual leave balance and request annual leave from this screen – this is available by clicking on the **Absence** button.

The screenshot displays the HR system's 'Absence' management interface. At the top right, a user profile shows 83% profile completeness. The left sidebar contains navigation options: Dashboard, Pay, Training, and Absence (highlighted with a red circle). The main content area is titled 'My Requests' and features a 'Book Time Off' button. It lists three annual leave requests:

Date	Duration	Status	Action
APR 18	6 Day(s)	Cancelled	Settings
FEB 06	1 Day	Approved	Settings
JAN 25	5 Day(s)	Approved	Settings

Below the list is a 'Work Week' summary for 19 Dec 2016 - 25 Dec 2016:

Day	Hours
Mon 19	7.3
Tue 20	7.3
Wed 21	7.3
Thu 22	7.3
Fri 23	7.3
Sat 24	Resting
Sun 25	Resting

To the right, 'My Balances' shows an annual leave balance of 11.00 days for an Executive Assistant. At the bottom, 'Important Dates' indicates 'Pay Day' is 'Not Available' and 'Time Off' is 'None Booked'.

You can view annual leave requested, approved or cancelled from this screen.

Should you wish to edit an annual leave request which you have made, you must do so, before your Line Manager approves.

If your annual leave has already been approved by your Line Manager and you wish to edit this for any reason, you must cancel the annual leave and resubmit.

There may be occasions that you have booked annual leave, however were ill and you have therefore been reported sick during a period of annual leave. HR will automatically remove this booked annual leave, upon receipt of notification from your Faculty/School/Department and return these days to your annual leave balance.

Staff are also asked to review the details under 'Work Week', to ensure the hours worked each day are recorded correctly on the HR database. N.B. if you work on a full-time basis your hours will be divided equally over five working days. If the details displayed are incorrect, please contact HR immediately to rectify this, as your annual leave entitlement is calculated using this information.

If you select the **Pay** button on the left you will see details regarding your salary. Over the next year we will continue to add additional buttons here with new functionality.

The screenshot shows a user dashboard with a navigation menu on the left. The 'Pay' button, represented by a money icon, is circled in red. A red arrow points from the top text to this button. The main content area is titled 'My Payslips' and features a 'Payment Summary' for the date 10th July 2015. The summary includes Total Earnings of £2,404.65, Total Deductions of (£610.57), and a Net Pay of £1,794.08. Other sections include 'Important Dates' with a 'Pay Day' on August 27 (20 days to go) and 'Time Off' (None Booked), and 'My Bank Accounts' with a masked account number ending in 47. A 'P60 Documents' section shows 'No P60 Documents Available'. The top right corner displays a profile completeness of 67% with an 'Improve' button.

Date	Total Earnings	Total Deductions	Net Pay
10th July 2015	£2,404.65	(£610.57)	£1,794.08
13th June 2015			
22nd May 2015			

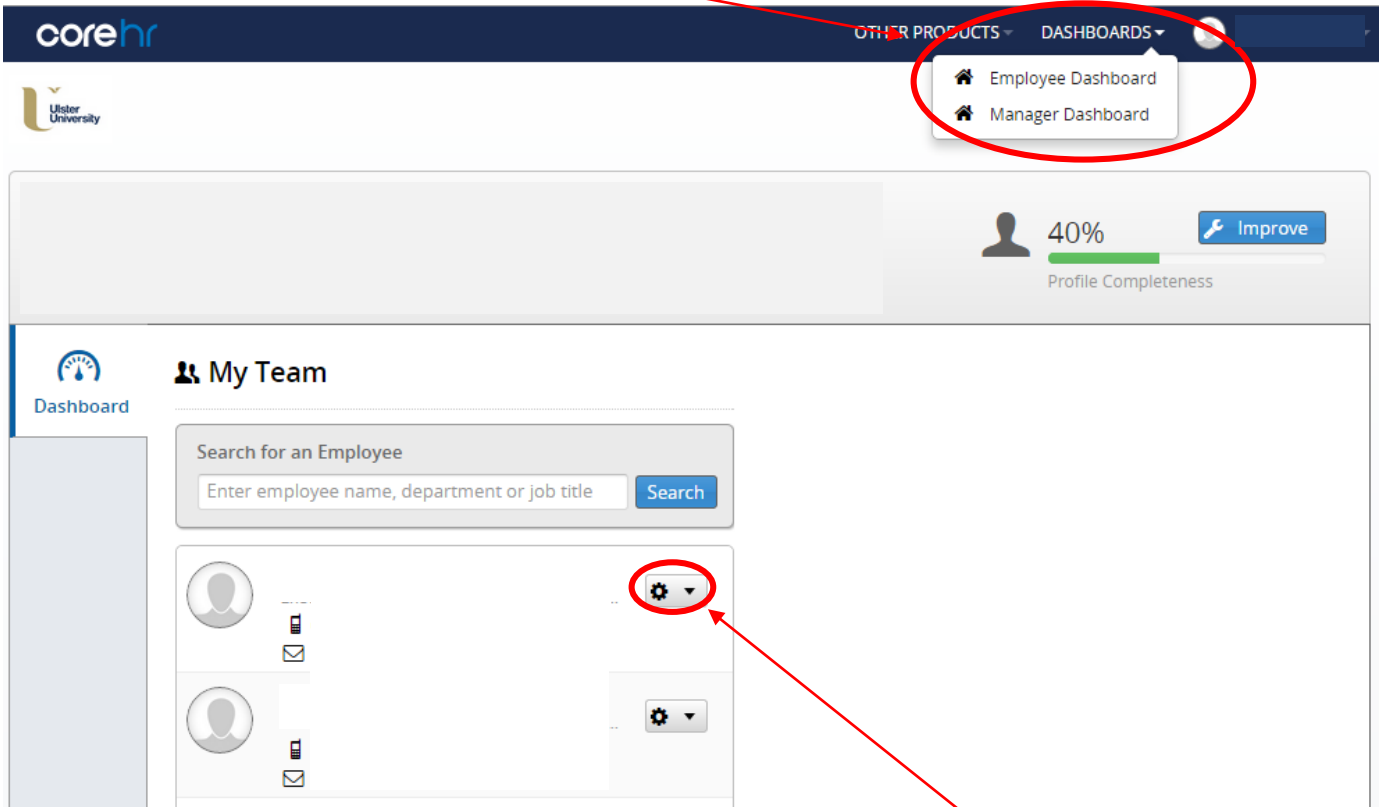
This **Pay** page will provide details on your salary history with online copies of your payslips and your P60, as we progress through the year.

You will also be able to view your bank account details, into which your salary will be paid into.

N.B. you will be unable to update your bank details online – this must be confirmed in writing directly to the Salaries and Wages Department.

Manager Dashboard

If you are a Line Manager, you will also have access to the Manager Dashboard. You can move between Dashboards by clicking on '**Dashboards**' and selecting the relevant option, as shown:



On this screen you will be able to see your direct reports. If you select the settings beside a team member, you will be able to see details on their direct reports also.

Please contact hr@ulster.ac.uk if your team members are not showing correctly. We understand that in some cases different Line Managers approve annual leave, appraisals, expenses etc for staff and each department may manage this in a slightly different way.

3 - Updating your personal Information

To review or update the personal information the University holds for you, select the **'My Profile'** button to update your own personal information.

The screenshot shows a dashboard with a top right corner displaying a profile icon, '100%' profile completeness, and a 'My Profile' button circled in red. Below this is a 'My Appointments' section with a table listing an appointment for '101827-1' in the 'Hr Administrative Systems M...' department, with a start date of '01 Feb 2003'. To the right is a 'What If' section for calculating reduced FTE or salary. A left sidebar contains 'Dashboard' and 'Pay' buttons. At the bottom, 'Important Dates' shows 'Pay Day' on August 27 and 'Time Off' as 'None Booked'.

You will be progressed through to the screen below, with a number of options displayed on the left hand bar. Each of these will provide more options for you to add personal detail if you wish to do so.

The screenshot shows a 'My Next of Kin Details' form. On the left is a sidebar menu with 'Employee Detail' circled in red, and other options like 'Next of Kin', 'Known As', 'Contacts', 'Dependents', and 'Bank Detail'. The main form has fields for 'Forename', 'Surname', 'Relationship', and 'Phone', along with a 'Comments' text area. Below these is an 'Address' field with a message: 'You have not yet provided address information'. A 'Save' button is at the bottom right.

We will continue to add additional areas to this screen in the future and a more detailed guide to entering data here can be found in Appendix 1.

The screenshot shows the 'My Contract' interface. At the top, it displays the contract ID '101827-1', the department 'Hr Administrative Systems M...', and the 'Human Resources Directorate'. Below this, the role is identified as 'Hr Administrative Systems Manager'. A grid of contract details includes: '01 Feb 2003 Started', 'Permanent Status', '68270 Extension', 'D NI Letter', '1 FTE', 'Paul Davidson Reporting To' (highlighted with a red box), 'Personal Salary Point 9999', 'Human Resources Dire... Department', 'Jordanstown Location', and 'None Entered Increment Due'. The bottom of the sidebar shows 'Other Information'.

Please check that your 'Manager details' on the 'My Contract' screen is correct. This is important to enable online authorisation to work correctly.

HR understand that individuals may have different Line Managers for different functions and this can be accommodated, but requires careful configuration and HR will continue to work with each Faculty/School/Department in order to roll this out, over the coming months, in a phased manner.

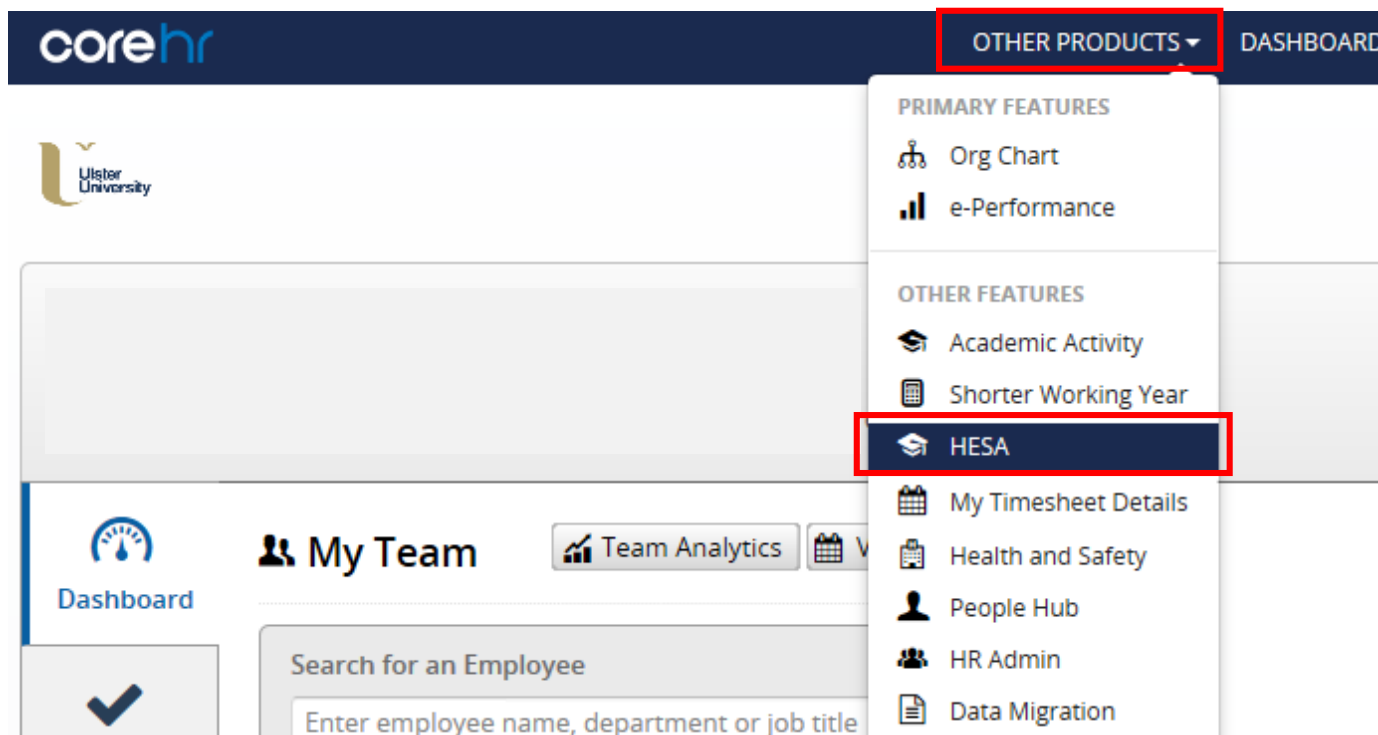
PLEASE IGNORE START DATE - the system derives this from appointments loaded and it was not possible to migrate all historic appointments due to organisation structure changes, but be assured we have migrated correctly the 'Date Joined'.

All issues/queries and Line Manager amendments should be forwarded to hr@ulster.ac.uk

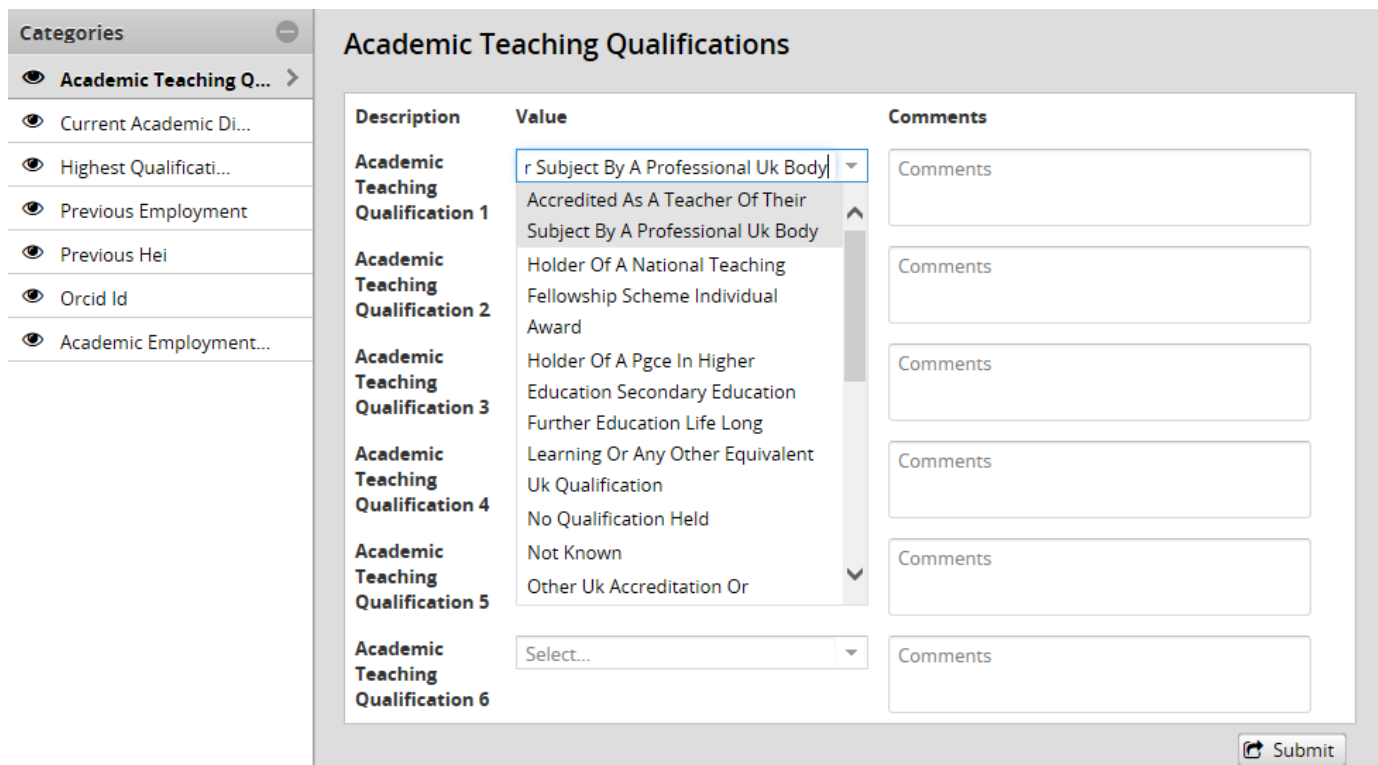
Your enquiry/request will be forwarded to the relevant contact within HR, who will respond to you at the earliest possibility opportunity.

HR are also asking staff to complete details in relation to **the Higher Education Statistics Agency (HESA)**. This is an official agency which collects, analyses and disseminates quantitative information about higher education and Ulster University has a statutory obligation to provide details relating to staff.

To insert your HESA details, please select the 'Other Product' option from the taskbar and select the HESA option.



You should enter details relevant to you in each of the Categories ensuring you 'submit' details in order to save your additions/amendments.



Appendix 1 – Amending/Entering personal details: Step by Step Guide

1. To view or amend your own details click on 'My Profile'.

The screenshot shows a user dashboard. At the top right, there is a profile icon, a progress bar at 100% labeled 'Profile Completeness', and a 'my Profile' button. A red arrow points from the text above to this button. On the left is a navigation menu with 'Dashboard' and 'Pay'. The main area is divided into three sections: 'My Appointments' showing a table with columns for ID (101827-1), Department (Human Resources Directorate), FTE (1), and Start Date (01 Feb 2003); 'Important Dates' showing 'Pay Day' on August 27 and 'Time Off' as 'None Booked'; and 'What If' with a 'Select Reduction Type' section containing radio buttons for 'FTE %' and 'Weeks', a 'Revised FTE' input field with the value '1', and a 'Calculate' button.

You will now see the following screen:

The screenshot shows the 'My Next of Kin Details' form. On the left is a sidebar menu under 'Employee Detail' with options: 'Next of Kin', 'Known As', 'Contacts', 'Dependents', and 'Bank Detail'. Below this are 'Diversity', 'Contract', and 'Other Information' sections, each with a plus sign. The main form area has a blue header 'View your Next of Kin details here.' and a form with fields for 'Forename', 'Surname', 'Relationship', and 'Phone'. Below these is a 'Comments' text area. At the bottom of the form is a 'Default' section with a gear icon and a dropdown arrow. A 'Save' button is located at the bottom right of the form.

2. Under 'Employment Details/Next of Kin' you can enter the Forename, Surname, Relationship, Contact Details, and any other relevant information of your 'next of kin'.

The screenshot shows the 'My Contact Details' section of an employee profile. On the left is a navigation menu with 'Employee Detail' expanded, showing options for 'Next of Kin', 'Known As', 'Contacts', 'Dependents', and 'Bank Detail'. Below this are sections for 'Diversity', 'Contract', and 'Other Information', each with a plus sign. The main content area is titled 'My Contact Details' and contains a table with the following fields: 'Emergency Contact Number', 'Home Phone No.', 'Personal Email Address', 'Personal Mobile Number', and 'Work Email Address'. Each field has a settings icon to its right. Below the table is a pagination control showing '1 of 2' and 'Displaying 1 - 5 of 7'. Below this is the 'My Address Details' section, which has a 'Home Address' field with a settings icon and a pagination control showing '1 of 1' and 'Displaying 1 - 1 of 1'.

This would typically be the person the University would call in event of any emergency.

Please ensure you save all details you enter.

3. Under 'Employee Detail, Contact' you can complete Contact Details and Address Details.

The screenshot shows the 'My Dependents' section of an employee profile. On the left is a navigation menu with 'Employee Detail' expanded, showing options for 'Next of Kin', 'Known As', 'Contacts', 'Dependents', and 'Bank Detail'. Below this are sections for 'Diversity', 'Contract', and 'Other Information', each with a plus sign. The main content area is titled 'My Dependents' and features a blue button labeled 'View dependent details'. Below this is a table with the following columns: 'Name', 'Date of Birth', 'Gender', 'Relationship', 'Country of Birth', and 'Nationality'. The table is currently empty, displaying the text 'No details to display'. At the bottom right of the section is a '+ Add New' button.

It should be noted that there are two pages under the contact details section, therefore please ensure all relevant sections have been completed.

- 4. Under '**Employee Detail, Dependants**' you have the ability to enter details about your dependants, if this is relevant and if you wish to do so.*

Additional functionality will be added to these screens over the coming months and you are asked to frequently check your information is accurate and up-to-date.

Appendix 2 – Frequently Asked Questions

(i) Do I have to provide additional personal details?

No – you are under no obligation to provide any additional personal information which is not relevant to your role in the University.

(ii) If I amend my address, will these details automatically be sent to any third party such as HMRC?

No – you will still have to inform any third parties, as we would not pass on this information.

Any employees with ‘Certificate of Sponsorship’ will still need to advise the HR Business Partner for their area of any change of address, to ensure that the information is updated with UK Visa’s and Immigration service.

(iii) If I amend my details and find an error, can this be edited?

Yes, you will be able to amend details as often as necessary.

(iv) Why can I not view my personal details when logging into Employee Self Service?

If you are a Manager, your initial screen will automatically default to ‘Manager Dashboard’. This screen will show details of the Team Members who are responsible to you.

To change this view, please see page 6 of this Guide, to view your

As new functionality is added to the ESS Portal, additional FAQ’s will also be added to this guide to reflect the feedback received.