

Step by step instructions

Running the accelerated increment eForm reports

ANU Insight has released three reports for users to run which provide all relevant stakeholders with secure access to a standard suite of detail reports based on the data entered into the Accelerated Increment HR eForms. These reports allow users to have easy access to secure, timely and informative HR eForm data through the [ANU Insight portal](#), which will be refreshed on a daily basis.

Accelerated increment eForm list

- This report lists all accelerated increment applications submitted using the ANU eForm for accelerated increment.

Accelerated increment eForm list – awaiting approval

- This report lists all accelerated increment applications submitted using the ANU eForm for accelerated increment that are still awaiting approval from a delegate.
- Where DHR approval is required and has not yet been granted but delegate approval has been granted, applications will appear in this report as 'awaiting approval'.

Accelerated increment eForm list – declined

- This report lists all accelerated increment applications submitted using the ANU eForm for accelerated increment that have been declined by a delegate.
- Where DHR approval is required and either the delegate or DHR have rejected the request, applications will appear in this report as having been 'declined'.

Logging into Insight

The **accelerated increment eForm reports** are accessed via the University's Information Management System known as ANU Insight.

The ANU Insight portal from where the reports can be accessed can be found below:

<https://insight.anu.edu.au/>

Please log in with your UDS or HORUS user ID and password in the format:

<p>User Name: User ID (e.g. u1234566) Password: your UDS or HORUS password</p>
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Step by step instructions on how to do this can be found in the [How to log into ANU Insight](#) document or if you are experiencing issues please contact the ANU Insight team on team on:

Email: insight@anu.edu.au

Phone: +61 2 6125 8649

Insight home page

When you first access the portal you will be directed to the **ANU Insight** portal home page as shown below:

The screenshot shows the ANU Insight portal home page. At the top left is the Australian National University logo and the word "Insight". Below this is a navigation bar with "Insight Home" and "My Folders". The main content area features a horizontal menu with five categories: "Human Resources", "Student", "Financial", "Research", and "Campus". Below this menu are two sections: "Help and support" and "News". The "Help and support" section includes "Contact" and "Documentation and training". The "News" section includes "New Chief Investigator Financial Reporting", "New ANU Insight Portal", and "Seeking student report testers". Below the news section are three columns of report recommendations: "Recently accessed reports", "My frequently accessed reports", and "Recommended reports". Each column lists several reports with search icons and titles.

The portal is available and has been tested on both Mac and PC and on many browser versions and mobile devices. However, if you are experiencing any issues in terms of how the portal renders or functions, please contact us on insight@anu.edu.au and for a full list of supported browsers, please refer to the frequently asked questions in the [FAQ ANU Insight](#) document.

Detailed information on how to navigate all the functionality available to users of the portal is available in the [How to Navigate the ANU Insight Portal](#) document.

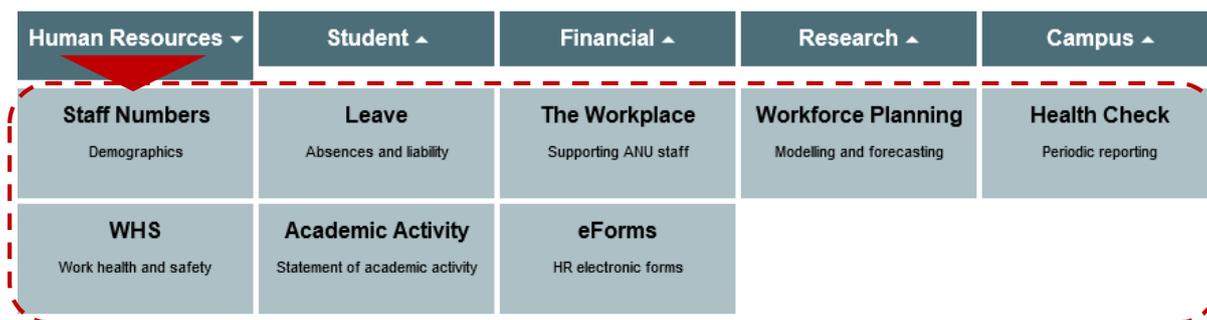
Navigating the portal

The Navigation menu shown below is how you navigate to report content.

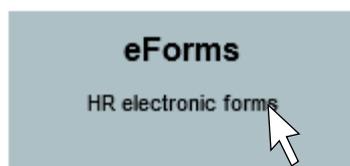
To access the **accelerated increment eForms** first *left click once* on the Navigation menu on the Human Resources Menu Header as shown below.



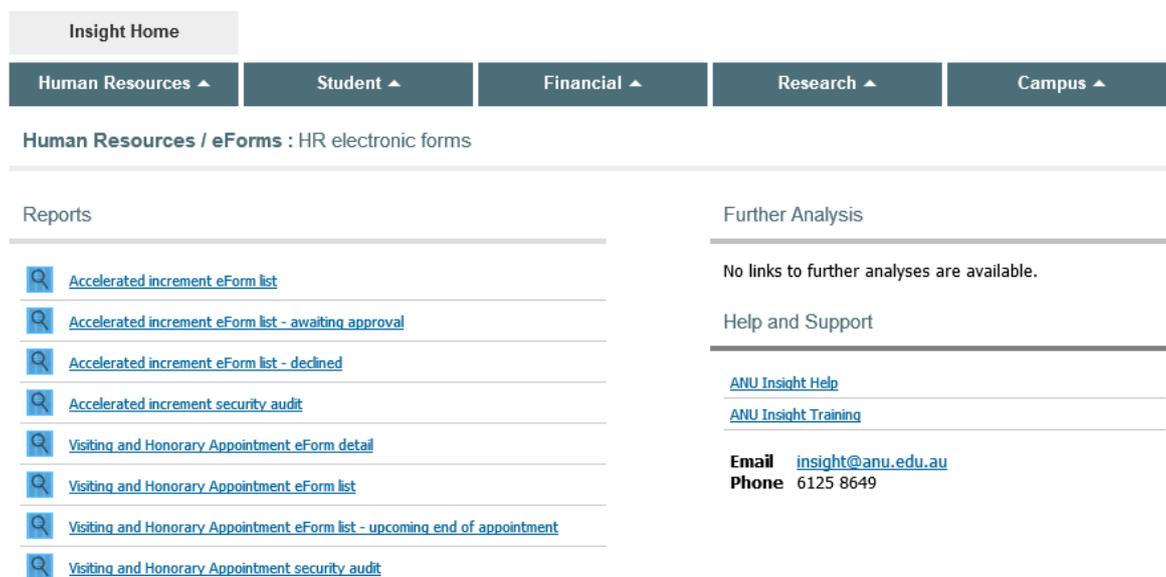
This would then open and display the Human Resources sub-menu:



The **accelerated increment eForm** report page can be found on the eForms page. *Left click once* on the sub menu item called **eForms** as shown below.

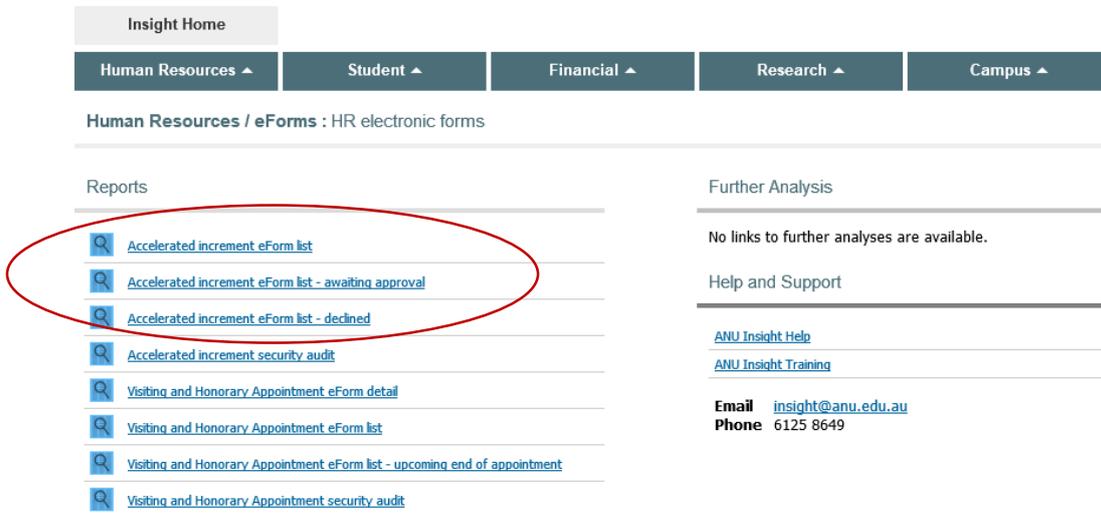


This would then access and display the **eForms** report page, as shown below.



Running a report

The **accelerated increment reports** can be seen at the top of the **Reports** list on the left hand side of the screen.



Insight Home

Human Resources ▲ Student ▲ Financial ▲ Research ▲ Campus ▲

Human Resources / eForms : HR electronic forms

Reports

- Accelerated increment eForm list
- Accelerated increment eForm list - awaiting approval
- Accelerated increment eForm list - declined
- Accelerated increment security audit
- Visiting and Honorary Appointment eForm detail
- Visiting and Honorary Appointment eForm list
- Visiting and Honorary Appointment eForm list - upcoming end of appointment
- Visiting and Honorary Appointment security audit

Further Analysis

No links to further analyses are available.

Help and Support

[ANU Insight Help](#)
[ANU Insight Training](#)

Email insight@anu.edu.au
Phone 6125 8649

Left click once on any of the report to run them. If you do not have access to run a report, it will appear as a non-hyperlink text item with the term “(secured)” appearing at the end. In this case, please get in touch with a member of the ANU Insight team using the contact details provided in the ‘Help and support’ section below.

All reports open in new tabs so you can return to the Insight home screen by switching back to the home screen tab at any time.

All reports are secured on the basis of ‘roles’ and corresponding user permissions granted in the Human Resources Management System (HRMS), so you will only be able to access records that you would have permission to see in the HRMS.

The following instructions use the **accelerated increment eForm list** report as an example. The accelerated increment eForm list – awaiting approval report and accelerated increment eForm list – declined report are both similar in their prompt pages and filtering options.

To run the accelerated increment eForm list, *left click* once on the report name. This will open up a prompt page as shown below. Please note, if you already have access to Insight but do not have access to the accelerated increment reports, when you *left click* once on the report name, the following secure message will appear.

Secured report - no records available

Accelerated Increment eForm reporting is restricted based on reporting lines and security defined in the Human Resources Management System (HRMS).

If you are seeing this message it means that no records are available to view due to one or more reasons identified below:

- You do not have appropriate operator access or delegations defined in the HRMS. Access is open to:

- HRMS operators with appropriate roles that currently enable you to view and report on these records.
- Deans, directors and other executives with banded delegations D3 and above.
- Staff can view accelerated increment records of staff supervised directly or indirectly, according to the position hierarchy.

- You have appropriate access defined in the HRMS but there are no Accelerated Increment eForm records.

Please note that both form changes and access changes in the HRMS are processed overnight. It may take up to 24 hours for changes to be reflected in this report.

For more information, please contact the ANU Insight service desk at insight@anu.edu.au

If you do have access to the reports, you will see the following prompt page after you *left click* once on the report name.

ACCELERATED INCREMENT EFORM LIST

Please note

This report has data security applied. You will not be able to select individuals or departments unless there are associated accelerated increment requests and you have the appropriate access level to view them.

Look up increments by:

Organisation unit (optional):

All colleges/portfolios

All schools/divisions

All schools/divisions

All departments/centres

AND/OR

Full name (optional):

Keywords:
Type one or more keywords separated by spaces.

[Options](#)

Choice:

[Deselect](#)

AND/OR

Request date range (optional):

From: 22/01/2016

Earliest date

To: 22/01/2016

Latest date

Cancel

< Back

Next >

Finish

The **accelerated increment reports** can be run for a specific college/portfolio, school/division, department/centre or any of the above, depending on your level of access. If no selection is made, the report will run for all staff in the available departments/centres for the user's college/portfolio. Retrieving such a large data set can take a long time and therefore, it is recommended that a user tell the report which organisational unit, Full name and or request date range to run the report for. The prompt page is used to do this.

On the **Prompt** page, the user has three options of parameter setting/filtering. The user may choose to filter for a report using one of the three options. **It is recommended that the user does not use more than one prompt at the same time.**

- The first prompt asks the user to select an 'Organisational Unit'. Use the drop down button to select a college/portfolio from the list. Once the selection is made, you may select a school/division from the next list and so on.
- Depending on user access, when you use the organisation prompt, the drop-down box will only display the college/portfolio, school/division and department/centre that the user is authorised to see.

Look up increments by:

Organisation unit (optional):

- All colleges/portfolios
- All schools/divisions
- All schools/divisions
- All departments/centres

- The next prompt asks the user to search for a form using the applicant's full name. Type one or more key words into the box, then left click on the 'Search' button. A list of names will be displayed in the choice box. Left click on the desired name and then on the 'Finish' button located at the bottom of the page to run the report.

AND/OR

Full name (optional):

Keywords:

Type one or more keywords separated by spaces.

a Search

Options

Choice:

Amanda Laugesen (U9701931)
Amy Holland (U4222915)
Anne Thoroughgood (U100307)
Anthony James (U4044121)
Daniel Bartkus (U4495750)
Dipanjan Mukherjee (U100009)
Elizabeth Allen (U4487551)
Eng Tan (U4589406)
Gavin Beard (U4341006)
Geoff Campbell (U4871238)
Hanbyol Lee (U5304872)

Deselect

- The last prompt asks the user to search by request date range. The user can either type the dates in DD/MM/YYYY format into the text box, or select a date in the drop down calendar by left clicking on the calendar icon on the right hand side of the prompt box. An alternative option, is the user can select the earliest date and latest date options to automatically search for the earliest and latest dated accelerated increment requests. This is also the default option.

AND/OR

Request date range (optional):

From:

01/01/2016 

Earliest date

To:

31/01/2016 

Latest date

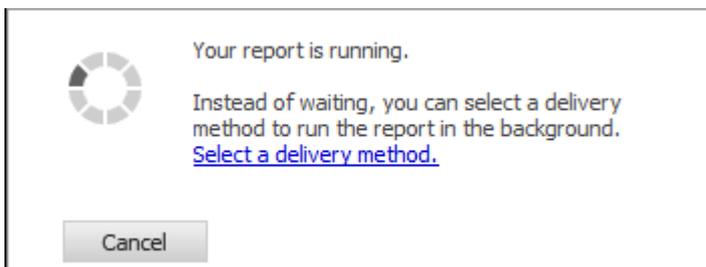
Navigating the prompt page

At all times at the very bottom of the prompt page, the prompt navigation buttons will show.



- Cancel** cancels the running of the report and will return you to the portal page
- Back** allows you to go back and change prompt values on a previous prompt page
- Next** allows you to skip a prompt page
- Finish** must be pressed to run the report

After you press 'Finish' you will see a report is running dialog box as shown following:



Once the system has retrieved the data, the report will be displayed.

Using the report

Once the report has been generated, you will get a layout such as the one shown below, depending on the selections that you make on the prompt page:

Request details		Increment staff member details											Delegate details			DHR approval details						
ARJ reference code	Request submitted date	Current approval step	Supervisor university ID	Nominator name	Uni ID	Position type	Name	Position description	Current grade	Current step	Increment new grade	Increment new step	Increment effective date	Increment type	Increment reason	Delegate approval required	Delegate	Delegate approval	Delegate comments	DHR approval required	DHR delegate	DHR approval
1000020047	21/6/2016 4:24:37 PM	Delegate Approval	U1910388	Stephen Harbitt	U1917615	Academic	Stephen Harbitt	Senior Research Officer	A	6	8	1	16/12/2015	Level A Academic with PhD who undertakes research equivalent to ARC/NMRC postdoctoral Level B1	N/A	Delegate approval required	Carroll, Jennifer	Awaiting approval		DHR approval not required	N/A	N/A
1000019062	20/6/2016 10:30:49 AM	Delegate Approval	U1980791	David Rowan	U1981610	Professional	Robert Barber	Senior Support Services Officer	F	6	7	2	20/6/2016	Accelerated Increment	Outstanding performance	Delegate approval required	Farmly, Barbara	Awaiting approval		DHR approval not required	N/A	N/A
1000019725	18/6/2016 5:20:49 PM	(Finish)	U1910340	Penelope Cox	U1917637	Professional	Richard Fox	Comp. Communications Officer	6P	1	6/7	2	18/6/2016	Accelerated Increment	Outstanding performance	Delegate approval required	U1980810	Approved		DHR approval not required	N/A	N/A
1000019719	18/6/2016 5:11:34 PM	(Finish)	U1910340	Penelope Cox	U1980773	Professional	Katharina Perna	Pub. Lect. & Pubs. Coordinator	6P	3	6/7	3	18/6/2016	Accelerated Increment	Outstanding performance	Delegate approval required	U1980810	Approved		DHR approval not required	N/A	N/A

You will see that the blue bar at the top of the report indicates the sections of the report and the information below these sections, correspond to its title. These sections are:

- **Request details** – the details of the person who initiated the accelerated increment request through an accelerated increment eForm. This person is usually the supervisor of the staff member who may receive an accelerated increment. If the supervisor holds the appropriate delegation they will be able to approve the form upon submission.
- **Increment staff member details** – the details of the staff member who may receive an accelerated increment if approved.
- **Delegate details** – the details of the delegate whose approval may be required for the accelerated increment. This person may be different to the requestor (supervisor).
- **DHR approval details** – the details of the Director of Human Resources (DHR) or another staff member holding the same delegation as the DHR. Only some applicants require approval from the DHR.
 - **DHR approval** – The Director of Human Resources (DHR) is required to approve the accelerated increment forms where a professional staff member is being incremented by more than one step and for certain academic positions.

The fields next to the filter icons at the top of the report denote the selections made on the prompt page as well as the filters applied to the report:

To refine the report, users can use the filters to choose the parameters for the report. To do this, left click on the box of the filter you would like to select, a tick will now be displayed in the box. To apply the filter, left click the Refresh button. The increment type filter is shown below as an example:

Increment type:

Accelerated Increment
 Level A Academic staff acquiring PhD qualifications (move to A4)
 Level A Academic with PhD who undertakes research equivalent to ARC/NHMRC postdoctoral Level B1

Refresh

[Select all](#) [Deselect all](#)

You will notice the 'Form approval status' is automatically filtered to 'Awaiting approval' for the Accelerated Increment eForm List – Awaiting Approval report.

Form approval status:

Approved
 Awaiting approval

Refresh

[Select all](#) [Deselect all](#)

Please note that a maximum of 20 data rows are displayed on one page in the browser by default. A navigation footer, as shown below, is located at the bottom of your browser window, which will allow you to access the other pages of data.



- Top** takes you to the first page of the report
- Page up** allows you to scroll up to the previous page
- Page down** allows you to scroll down to the next page
- Bottom** takes you to the last page of the report

When the 'Top' and 'Page up' button are greyed out, it implies that you are already at the first page of the report and cannot scroll up any further.

When the 'Bottom' and 'Page down' button are greyed out, it implies that you are already at the last page of the report and cannot scroll down any further.

Save, Print, Annotate & Send

Once the reports are generated, the most common thing users will want to do is Save, Print, Send or Annotate (change) the Report.

- If you wish to Save, Print or Send the report, it is best to re-run the report in PDF format.
- If you wish to change the Report or use part of the report information, it is best to re-run the report in Excel Format.
- To run the report into other output formats like PDF or Excel you will need to access the *Report Output* button which can be found on the **Report Action Menu** shown below:



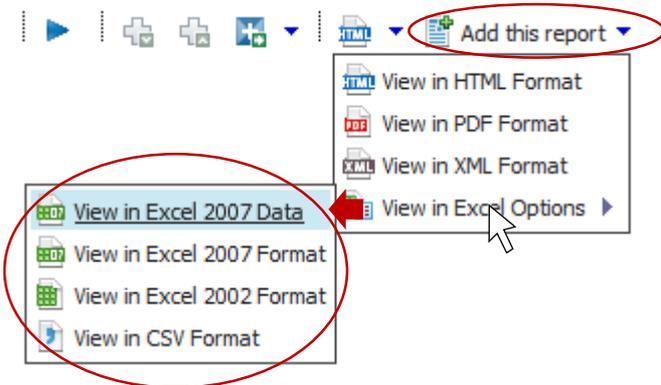
The report action menu can be found on the upper right of the screen under the Report Viewer header.



Report Output button will by default look like  but will change to show a PDF or Excel icon depending on the format chosen.

The *Report Output* button allows report users to change the output format of the report. If you *left click once* on the down facing arrow next to the report action button the output format choice menu will appear.

The report can be run in HTML, PDF, XML or Excel. On most computers there will be 4 alternative Excel output formats.



- PDF is the preferred output format for email, distribution, saving and printing. Once the report has been generated as a PDF it is pre-formatted for printing, pagination is handled correctly and it can be distributed without risk of numbers being easily over-written.
- Excel is the best format if a user wants to make notes or incorporate additional data. There are four options to choose from explained below:

Excel 2002 should be used for users with older computers.

Excel 2007 Data extracts the data from the reports but does not export the formatting.

Excel 2007 Format extracts the report into Excel but retains the report formatting.

Getting help and assistance

HR eForm users seeking help understanding the reports and/or their data should contact the ANU Insight team.

Phone: +61 2 6125 8649

Email: insight@anu.edu.au

Users seeking assistance in using the eForms should get in touch with the HR systems team via email at hssystem@anu.edu.au