Step-by-Step Instructions

Running Deferred exam eForm tracking list report

ANU Insight has released a deferred exam eForm tracking list report, providing all relevant stakeholders with secure access to a workflow tracking report based on the data entered into the deferred exam eForms.

This report includes the details of student (requestor), term, course, course delivering organization unit (college/ research school/ school), application reason, decisions made by Examinations, Graduations and Prizes (EGAP) and workflow information. It is refreshed on a daily basis.

Logging into Insight

The Deferred exam eForm tracking list is accessible via the University’s Information Management System known as ANU Insight.

The ANU Insight portal from where the report 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:

User Name: User ID  (e.g. u1234566)
Password: your UDS or HORUS password

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 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.

The student eForm reporting can be accessed through the navigation menu by left clicking on the Student Menu Header as shown below.

Left clicking on the Student Menu Header would then open and display the Student sub menu:
The Deferred exam eForm tracking list can be found on the eForms page. Left click the sub menu item called eForms as shown below.

This would then access and display the eForms report page.

Running a report

The Deferred exam eForm tracking list can be seen under the Reports list on the left hand side of the screen.

Content relating to Student eForms is secured based on access to the Student Administration System (SAS). If you require access to the reports please visit the Student Administration System webpage to find more information and to download the access form. Your access form should be submitted via email to sbs.help@anu.edu.au.

If you have appropriate access to the Deferred exam eForm tracking list, once Deferred exam eForm tracking list link has been clicked, the prompt page will appear.
Please click on the filters as necessary. Filters usage assistance is provided below.

**Prompt page filters**

There are five types of filters on the prompt page: (1) course organization, (2) term (3) course, (4) form submitted date, and (5) EGAP approval. All filters are optional.
Course/Class owner organization

Click on the first drop down arrow and select the required College, this will activate the next drop down. You can drill down to school/centre level. If no filtering is made here, the University is selected by default.

Term

You can select the term(s) of your interest. If no filtering is made here, all terms are selected by default.

Course

You can select the course(s) of your interest. If no filtering is made here, all courses are selected by default.

Form submitted date

You can refine the report by pre-defining the form submitted period. To input the date(s), you can type into the date field in DD/MM/YYYY format, or click on the calendar icon and select the date. If no filtering is made here, the default date range will cover all.
You can select the approval status of your interest. If no filtering is made here, all status are selected by default.

Once the filters have been applied, click on the ‘Finish’ button. Consequently the prompt page will be replaced by the report page. It may take a few moments to run the report. In the meantime a loading screen shall appear as below.

Using the report

The report page should be as below.

The filters in the prompt page and the corresponding values are shown at the top of the report.
You can redo all the filtering in the report page. For all the filters other than the course delivering/class owner organization, which is automatically re-filtering, please click on the ‘Refresh’ button to complete the refiltering.

The report presents tabular data of students’ deferred exam requests, per request per course per row. Following are definitions of table headings:

- **Form ID** - The 10 digit unique identifier of the eForm, which is generated when the eForm is created.
- **Student ID** - ID number of the student to whom the form applies.
- **Student name** - Name of the student to whom the form applies.
- **Subject catalogue code** - 4 letters and 4 digits unique code given to a course, e.g. BUSN2011 for Management Accounting.
- **Course Name** - Long description of a course, e.g. Management Accounting.
- **Term caption** - 4 digits term code and the full description of semester and year, e.g. 2730 - First semester, 2017.
- **Class academic career code** - The academic career level for the course, e.g. UGRD, PGRD, RSCH, and NAWD.
- **Reason** - Reason for the deferral of exam, e.g. misadventure, illness, and personal reasons.
- **EGAP approval description** – Decision made by the examinations, grants and prizes board (EGAP).
- **Finished date** - Date when all the workflow steps on the form were successfully completed.
- **Current step name** – name of workflow step that the eForm is currently at.
- **Current step assigned date** - Date on which the current workflow step was assigned.
- **Currently assigned to** - Person to whom the form is currently assigned.

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 the report page, which will allow you to access the other pages of data.

<table>
<thead>
<tr>
<th>Top</th>
<th>Page up</th>
<th>Page down</th>
<th>Bottom</th>
</tr>
</thead>
</table>

- **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’ buttons 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’ buttons 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 action users will want to take 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 & CSV 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

eForm reporting 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

eForm users seeking assistance to use the eForms should contact their local student administrator or Student Central (student@anu.edu.au).