

Step by step instructions

Running the Visiting and Honorary Appointment (VaHA) eForm Detail report

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 VaHA 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.

The VaHA eForm Detail Report

- This report can be used to review all VaHA information provided at the time of submitting a VaHA request using the ANU eForm for appointee/Honorary Appointment.
- This report only looks at one record at a time. To view multiple records at a time, you may wish to use the VaHA eForm list.

Logging into Insight

The **VaHA eForm detail report** is 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/HORUS user ID and password in the format:

| |
|--|
| <p>User Name: your UDS (e.g. u1234566) Password: your UDS or HORUS password</p> |
|--|

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:

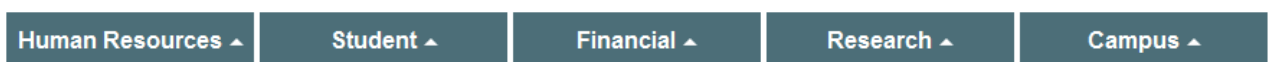
The screenshot shows the ANU Insight portal home page. At the top left is the Australian National University logo and the word 'Insight'. Below this is a navigation bar with 'Insight Home', 'My Folders', and 'Public Folders'. A main navigation menu consists of five dark teal buttons: 'Human Resources', 'Student', 'Financial', 'Research', and 'Campus'. Below this are two sections: 'Help and support' with 'Contact' and 'Documentation and training', and 'News' with three items: 'Statement of Academic Activity available now', 'New Financial Reporting Project launching', and 'New HR Reporting coming soon'. At the bottom, there are three columns: 'Recently accessed reports', 'My frequently accessed reports', and 'Recommended reports'. Each column lists several reports with search icons and links to the reports.

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

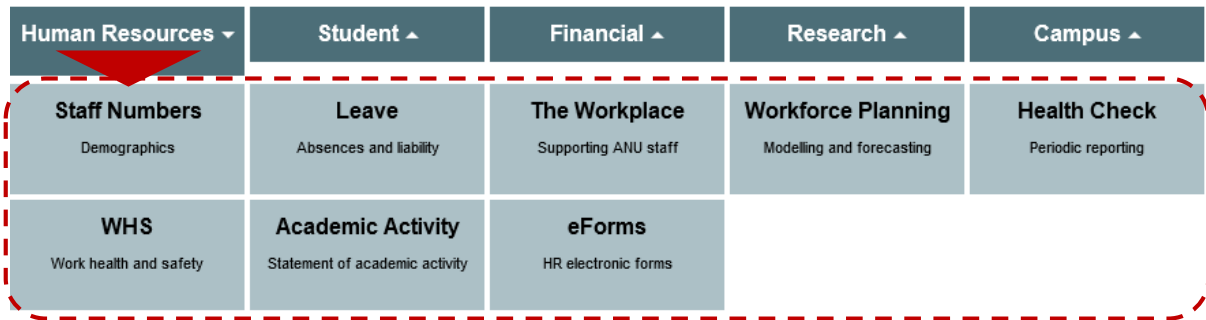
The Navigation menu shown below is how you navigate to report content.



To access the **VaHA eForm detail report** first *left click once* on the Navigation menu on the Human Resources Menu Header as shown below.



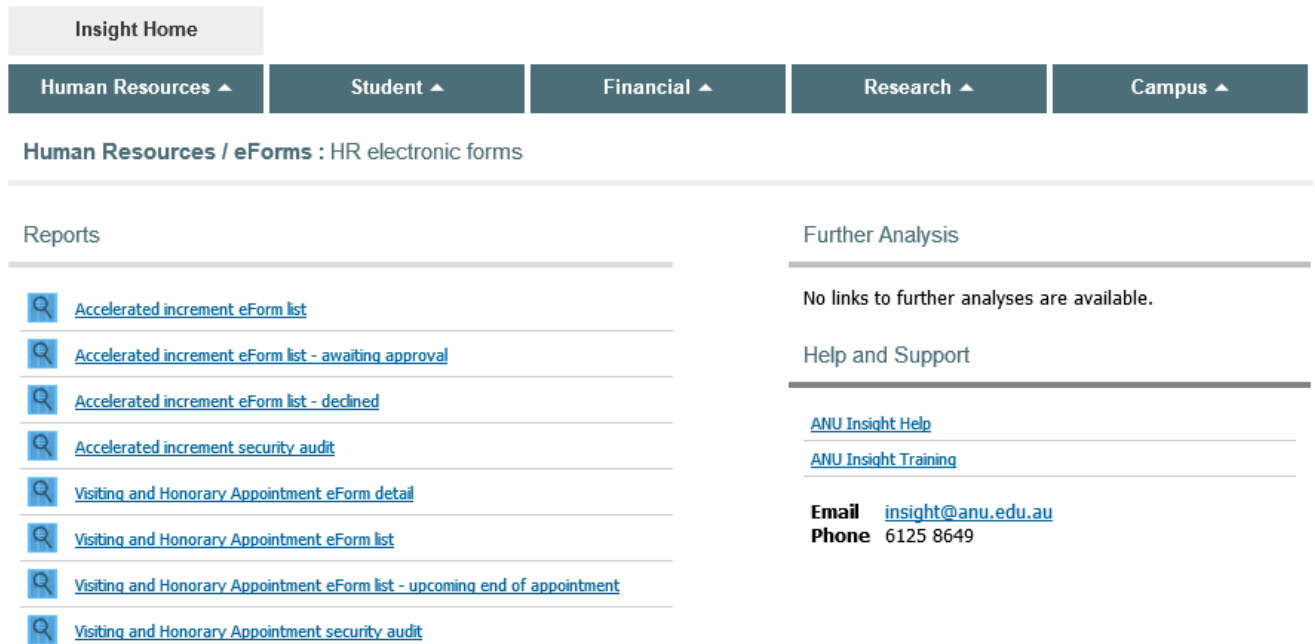
This would then open and display the Human Resources sub menu (shown in red rectangle below):



The **VaHA eForm detail** 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 **Human Resources / eForms: HR electronic forms** Page, as shown below.





Running a report


The **Visiting and Honorary Appointment eForm detail** report can be seen at the bottom of the **Reports** list on the left hand side of the screen.


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](#)

To run the **Visiting and Honorary Appointment eForm detail** report *left click once* on the report name. 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.

Please note, if you already have access to Insight but do not have access to the VaHA reports, when you *left click* once on the report name, a secure message similar to the one below will appear.

Secured report - no records available

Visiting and Honorary Appointment eForm reporting is restricted based on 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.
- You have appropriate access defined in the HRMS but there are no Visiting and Honorary Appointment 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.

There are two steps of parameter setting/filtering in the prompt page.

- Step 1: Selecting one of the **three filters listed in the left half** of the prompt page is **optional**.

The VaHA eForm detail report can be run for only one particular record and these can be selected by specifying the form ID, form submitted date, or appointee name.

If no selection is made on the left half of prompt page, the filter list on the right half of prompt page will display up to 100 eForms, submitted between the earliest to the latest dates captured by the eForm system. The above screenshot of Visiting and Honorary Appointment eForm detail prompt page displays the filter list when no optional selection is made.

However, it is likely that the record you are searching for may not be in the top 100 records and therefore, it is recommended that a user provide appropriate search criteria using the prompts on the left hand side. Details of how optional and required selections work together will be discussed below.

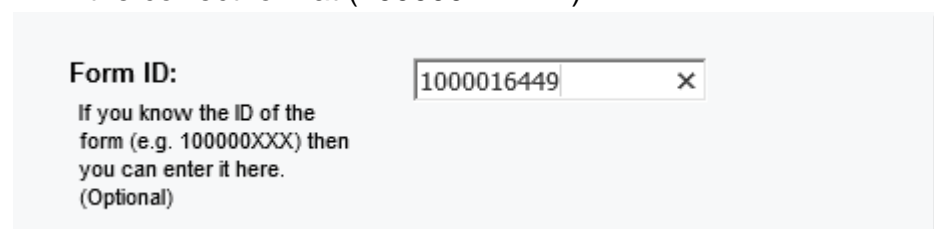
- Step 2: selecting a record in the **Appointment Form** box is **required**.

Regardless of the selection made on the left half of the prompt page, the *Filter List* button should be *left clicked*, and one and only one Appointment Form should be selected, before you *left click* the *Finish* button to run the report.

Using the optional and required prompts together

- **Optional Filter 1 - Form ID**

In cases where the form ID is known, this filter should be used to input the form ID in the correct format (100000XXXXX).



The screenshot shows a form field labeled "Form ID:". Below the label is the instruction: "If you know the ID of the form (e.g. 100000XXXX) then you can enter it here. (Optional)". To the right of the text is a text input box containing the value "1000016449" and a small "x" icon in the top right corner of the box.

Once the Form ID is entered correctly, you can *left click* the *Filter List* button in the middle of the prompt page, which should retrieve one Appointment Form.

Note: there will always be only one record in the appointment form when using the form ID as a search criteria as each form ID corresponds to a single request.

Appointment form:
 At most 100 forms displayed. Filter the list by using the prompts to the left. (Optional)

* **Request Submitted** - <<POI type not captured>> - starting 2015-11-09 (1000016449)

Filter list >


Select the record in the appointment form box and then *left click* the *Finish* button located at the bottom of the prompt page. The Visiting and Honorary Appointment eForm detail report will run for the form ID that was selected.

- **Optional Filter 2 - Request Submitted Time**

To filter by **Form Submitted Date**, the user can either enter the date into the textbox in DD/MM/YYYY format or select a date in the drop-down calendar. This will limit the appointment form box to include requests submitted within the specified date range. An alternative option, is for the user to select the earliest date and latest date options to automatically search for the earliest and latest dated VaHA eForm requests. This is also the default option.


Request submitted between:
(Optional)

From:

01/01/2016 

Earliest date

To:

16/01/2016 

Latest date

Once the date range has been specified, *left click* the *Filter List* button in the middle of the prompt page, which should retrieve a list of requests submitted during the specified date range and populate them in the Appointment Form box.

Select the desired record in the appointment form box and then *left click* the *Finish* button located at the bottom of the prompt page. The Visiting and Honorary Appointment eForm detail report will run for the record that was selected.

- **Optional Filter 3 - Appointee Name**

In cases where the name of appointee is known, this filter should be used to input their full name, family name or given name and click the *Search* button.

The screenshot shows a search interface for 'Appointee name'. On the left, the text 'Appointee name: (Optional)' is displayed. On the right, there is a 'Keywords:' section with a text input field containing 'smith', a clear button (x), and a 'Search' button with a magnifying glass icon. Below this is an 'Options' link with a downward arrow. Underneath is a 'Choice:' section with a large empty rectangular box. At the bottom right of the box is a 'Deselect' link.

For advanced search options, click on [Options](#) to modify the type of search.

The screenshot shows a dropdown menu for search options. At the top is the 'Options' link with an upward arrow. Below are four radio button options: 'Starts with any of these keywords', 'Starts with the first keyword and contains all of the remaining keywords', 'Contains any of these keywords' (which is selected), and 'Contains all of these keywords'. At the bottom is a checked checkbox for 'Case insensitive'.

A list of matching fields will be displayed in the *Choice* box. *Left click* to select and click the *Search* button again. The results will be displayed in the **Choice box**. **Note: You must select a name in the Choice box in order to proceed.**

Keywords:
Type one or more keywords separated by spaces.

smith

[Options](#) ▾

Choice:

Annabel Smith
Hilary Smith
Jessica Smith
Jim Smith
John Smith
Kyanne Smith
Michael Smith
Mike Smith
Peter Eldridge-Smith
Richard Brabin-Smith
Scott Smith

[Deselect](#)

Appointee name:
(Optional)

Once the appointee name has been selected in the Choice box, you can *left click* the *Filter List* button in the middle of the prompt page, which should retrieve all POI/ Honorary Appointment eForm requests for that appointee. Select one record in the appointment form box and then *left click* the *Finish* button located at the bottom of the prompt page. The Visiting and Honorary Appointment eForm detail report will run for the record that was selected.

Appointment form:
 At most 100 forms displayed. Filter the list by using the prompts to the left. (Optional)

* Jessica Smith - Occupational Training - 00007 - starting 2016-02-10 (1000017457)
 Jessica Smith - Occupational Training - 00007 - starting 2016-02-01 (1000015426)

Navigating the prompt page

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



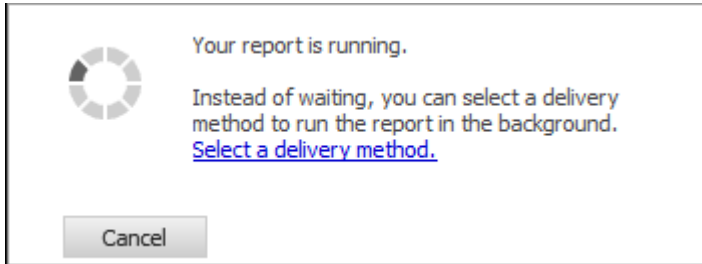
- Cancel** cancels the running of the report and will return you to the portal page
- Back** allows you to go back and change prompt values on a previous prompt page, if one exists
- Next** allows you to skip a prompt page, if the report contains more than one prompt page
- Finish** must be pressed to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

Important

A rectangular button with a thin border and the word "Finish" centered inside.

The *Finish* button must be pressed before a report can be run and will remain greyed out until one and only one Appointment Form is selected.


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



Once the system has retrieved the data, the **VaHA eForm detail report** will be displayed.

Using the report

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



VISITING AND HONORARY APPOINTMENT EFORM DETAIL

Form ID: 1000017497

Appointee details

University ID: ?
 Title: Miss
 Name: [Redacted]
 Email address: [Redacted]
 Phone number: [Redacted]

Appointment reasons

- Research collaboration

Funding & expense summary

| Funding source | Expense type | Expense amount | GL code | ANU total | Home institution total |
|------------------------|--------------|----------------|------------|---------------|------------------------|
| ANU | Other | 20,000 | Q430000000 | 20,000 | - |
| Overall - Total | | 20,000 | | 20,000 | - |

Living away from home allowance eligibility: **The POI is not an Australian Citizen or permanent resident.**

Nominator details

University ID: U8600000
 Name: M. [Redacted]
 Position: Academic Staff, Research Program (ANU Laureate Fellow)

Home institution and education details

| Academic level at home institution | Home institution | Home institution country | Highest education level | Highest education institution | Highest education institution country |
|------------------------------------|-----------------------------|-----------------------------|-----------------------------|-------------------------------|---------------------------------------|
| Not applicable/not provided | Not applicable/not provided | Not applicable/not provided | Not applicable/not provided | Not applicable/not provided | Not applicable/not provided |

Citizenship details

| Australian citizen or permanent resident | Appointee current citizenship | Appointee home country | Relocating? | Bringing dependents? |
|--|---|---|-----------------------------|-----------------------------|
| Not applicable/not provided | Under/Regulation of most British and Irish/Ireland citizens | Under/Regulation of most British and Irish/Ireland citizens | Not applicable/not provided | Not applicable/not provided |

Approval history

| Step | Workflow step name | Step started | Assigned to | Step elapsed days |
|------|-----------------------|------------------------|----------------------|-------------------|
| 1 | Supervisor Nomination | 04/12/2015 5:16:03 PM | Prof. [Redacted] | 2.65 |
| 2 | POI Detail Entry | 07/12/2015 9:55:40 AM | [Redacted] | 1.11 |
| 3 | Supervisor Nomination | 08/12/2015 11:27:21 AM | [Redacted] | 0.00 |
| 4 | POI Detail Entry | 08/12/2015 11:29:17 AM | [Redacted] | 0.02 |
| 5 | Nominator Review | 08/12/2015 11:54:59 AM | M. [Redacted] | 0.03 |
| 6 | Delegate Approval | 08/12/2015 12:44:01 PM | Professor [Redacted] | 2.82 |
| 7 | POI Acceptance | 11/12/2015 9:32:09 AM | [Redacted] | 0.09 |
| 8 | (Finish) | 11/12/2015 10:48:12 AM | | |

Date submitted: 07/12/2015
 Date finalised: 11/12/2015

Engagement details

Appointment type: Occupational Trainee - 0007
 Start date: 10/02/2016
 End date: 22/12/2016
 Duration (days): 316
 Access requirements: Login and email
 College: College of Physical & Math Sci
 School: Res Sch Physics & Engineering

Statement of contribution to ANU

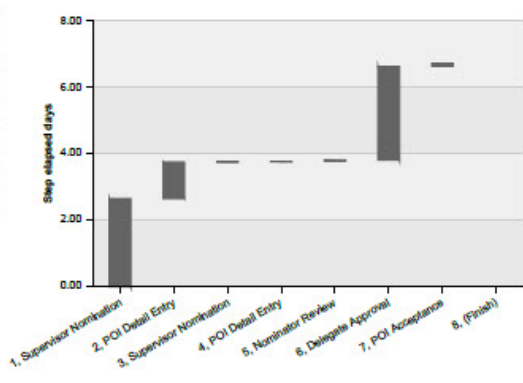
Not applicable/not provided

Delegate details

Unavailable until form submitted for delegate approval
 University ID: U8600000
 Name: Professor Tim Sander

Page 1 of 1
 Report run at: 2016-01-28 11:15:07 AM by Vrtil Mehra
 Data as at: 28/01/2016 4:01:52 AM
 Source: ANU Insight Data Warehouse

For support please contact the ANU Insight team: insight@anu.edu.au



| Step | Step elapsed days |
|--------------------------|-------------------|
| 1. Supervisor Nomination | 2.65 |
| 2. POI Detail Entry | 1.11 |
| 3. Supervisor Nomination | 0.00 |
| 4. POI Detail Entry | 0.02 |
| 5. Nominator Review | 0.03 |
| 6. Delegate Approval | 2.82 |
| 7. POI Acceptance | 0.09 |
| 8. (Finish) | |

The Form ID at the top left of the report denote the unique identifier for the record that you selected in the appointment form box on the prompt page.

Appointee information is displayed under the sections **Appointee details**, **Home institution and education details** and **Citizenship details**.

The **nominator details** section contains the details of the person who initiated the request to engage an appointee through a VaHA eForm.

Delegate details are the details of the delegate whose approval may be required for the appointment.

Appointment reasons indicates the purpose for which the appointment was made. This is displayed as selected in the form.

Engagement details section contains the appointment type, start and end dates of the appointment, duration of the appointment, access to University System and resources, and the area the appointee will work for.

Funding & expense summary provides financial/expenses details incurred by ANU related to the appointment.

Statement of contribution to ANU At the Appointee detail entry stage, the appointee may specify how their experience and expertise will contribute to the research, education and teaching activities of ANU by text or attaching documentation.

The **Approval history** illustrates the progress of each application and details of approval. Please note the finish time of each step is the start time of the next step. For example, when the last step shown in the Approval history table is “Appointee acceptance”, it indicates that the appointee will accept/reject the nomination as the next step. It should not be confused with the last completed step.

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 export the report to PDF format.
- If you wish to change the Report or use part of the report information, it is best to export the report in Excel Format.

- To export the report into 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:



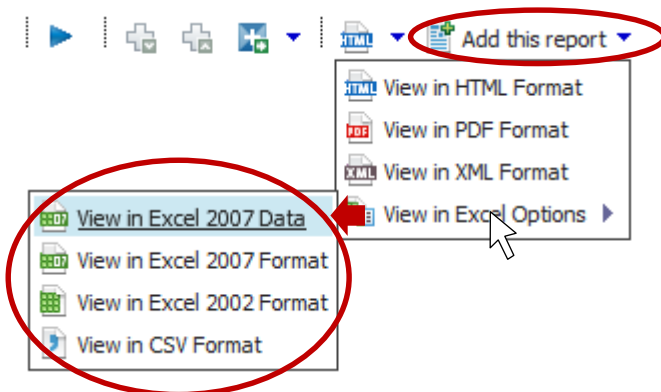
The report action menu can be found on the upper right of the screen under the Report Viewer header.



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 format extracts the report into Excel but retains the report formatting.