Step by step instructions

Running the Visiting and Honorary Appointment (VaHA) eForm List – Upcoming End of Appointment 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 List – Upcoming End of Appointment

- This report provides a list of all VaHA applications submitted using the ANU eForm for appointee/Honorary Appointment whose appointment is approaching the proposed end date within a week, month or more of the report run date.

- End of appointment date is captured in the form. This report checks if the end of appointment date falls within 0-7 days (week), 8-30 days (month) or 31+days (more than a month) from the date that the report is run on.

- User can drill-through to VaHA eForm detail report.

Logging into Insight

The **VaHA eForm list - upcoming end of appointment report** can be 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:

> **User Name:** your **UDS**   *(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.
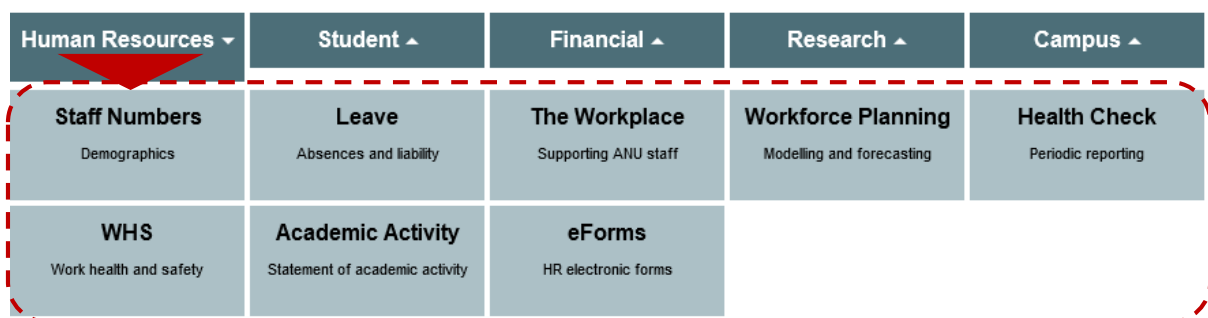
Navigating the portal

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

Human Resources ▲	Student ▲	Financial ▲	Research ▲	Campus ▲

To access the **VaHA eForm list - upcoming end of appointment** first *left click once* on the Navigation menu on the Human Resources Menu Header as shown below.

Human Resources ▲

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

Human Resources ▼	Student ▲	Financial ▲	Research ▲	Campus ▲
Staff Numbers Demographics	**Leave** Absences and liability	**The Workplace** Supporting ANU staff	**Workforce Planning** Modelling and forecasting	**Health Check** Periodic reporting
WHS Work health and safety	**Academic Activity** Statement of academic activity	**eForms** HR electronic forms		

The **VaHA eForm list - upcoming end of appointment** 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 list - upcoming end of appointment** can be seen at the bottom of the **Reports** list on the left hand side of the screen.

To run the **Visiting and Honorary Appointment eForm list - upcoming end of appointment** 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 reporting lines as well as '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.

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

The **Visiting and Honorary Appointment eForm list - upcoming end of appointment** report can be run for a specific college/portfolio, school/division, department/centre or any of the above, depending on your level of access. The filtering on the prompt page is not compulsory; if no selection is made, the report will run for all VaHA eforms, submitted between the earliest to the latest dates captured by the eForm system. However, retrieving such a large data set can take a long time and therefore, it is recommended that a user filter the report by using appropriate search criteria. The prompt page is used to do this.

To filter by **Organisation**, the user should left *click* on the first drop down arrow and select the required College/Portfolio. This will activate the next drop down. Select down to the lowest level required or to narrow down the results in the report**. Please note that depending on user access, the drop-down box will only display the college/portfolio, school/division and department/centre that the user is authorised to see and where a valid VaHA record exists.**

To filter by **Appointment Type**, the user can select one or more types. This will limit the VaHA eForm list to just forms for the selected type(s) of appointment.

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

After you press *Finish* you will see a report is running dialog box as shown following:
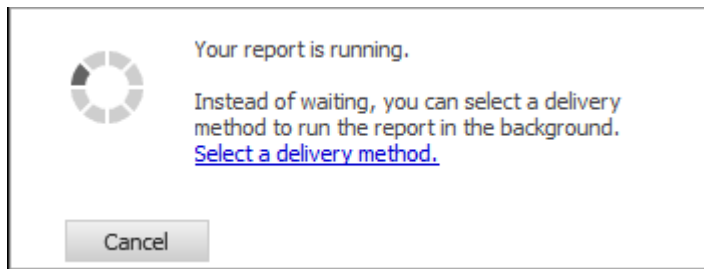
Once the system has retrieved the data, the **VaHA eForm list - upcoming end of appointment report** will be displayed.

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:

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:

▼ **Organisation:** All ANU   ▼ **Appointment type(s):** All appointment types

The report consists of 3 major parts, list of eforms with appointment **end date within one week (today to 7 days away)**, list of eforms with appointment **end date within one month (8 to 30 days away** from the report run date**)** and list of eforms with appointment **end date more than one month (31+ days away** from the report run date**)**.

The first two columns of the table, **College/portfolio** and **School/division**, also may reflect the selections made on the prompt page. As an example, if the user has successfully chosen ANU College of Law for College/portfolio on the prompt page, only this college will be shown in the first column on the report page.

The **Request submitted date** indicates when the form was successfully submitted by the nominator for the appointee to complete the next step in the workflow.

The **Latest approval step** column shows the current status of the VaHA eform indicating where in the workflow the process is at. These statuses can be Nomination, Appointee detail entry, Nominator review, Delegate approval, Appointee Acceptance and Finish.

The **Form type** is the general classification of the engagement and can be Professional, Academic or Extension. It should not be confused with the **Appointee type** or the **Appointment Type** that the user have chosen on the prompt page.

The **appointment details** section contains details about the appointment including appointment type, start and end dates, duration as well as the total cost to ANU of engaging an appointee.

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

Drill-through functionality

Another important feature of this report is the ability to 'drill-through' to the detail level data. Drill-through access lets users navigate from a source report to a target report to view related data. In the **VaHA eForm list - upcoming end of appointment** (source report), you can drill-through from the blue hyperlinked cells showing the **Form ID**, to the **VaHA eForm detail report** (target report) to view the details of a specific VaHA eForm.

To drill through to the target report, *left click once* on the blue hyperlinked cells that you would like to see the detail data for, as shown below:

Clicking on this cell will open up the target report in a new tab or window in your browser. You can go back to the source report by switching over to the tab or window that the report was open in.

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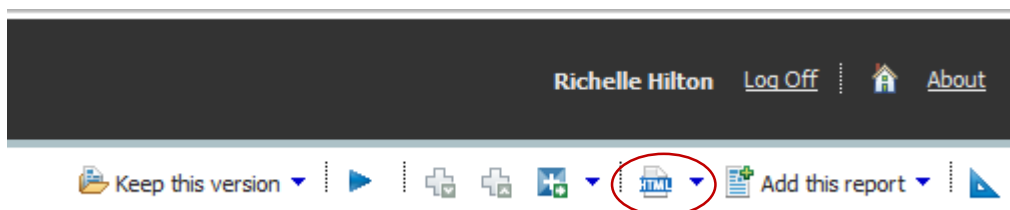
Report Output button will by default look like but will change to show a PDF or Excel icon depending on the format chosen.

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.
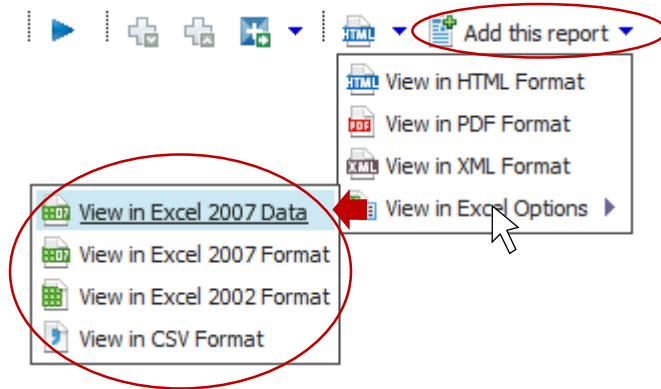
- PDF is the preferred output format for email, distribution, saving and printing. Once the report has been generated as a PDF it is pre-formatted for printing, pagination is handled correctly and it can be distributed without risk of numbers being easily over-written.

- 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.