

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:

Australian National University Insight

Insight Home My Folders Public Folders

Human Resources Student Financial Research Campus

Help and support News

Contact Documentation and training Statement of Academic Activity available now New Financial Reporting Project launching New HR Reporting coming soon

Posted: 30/09/2015 Posted: 30/09/2015 Posted: 30/09/2015

Recently accessed reports My frequently accessed reports Recommended reports

Recently accessed reports	My frequently accessed reports	Recommended reports
Student List of course enrolments	Student List of course enrolments	Portfolio report pack
Student Low enrolled courses report	Student Low enrolled courses report	Project report pack
Financial Subproject report pack	Financial Subproject report pack	Subproject report pack
Financial Project report pack	Financial Project report pack	
Human Resources Data reconciliation	Human Resources Data reconciliation	

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

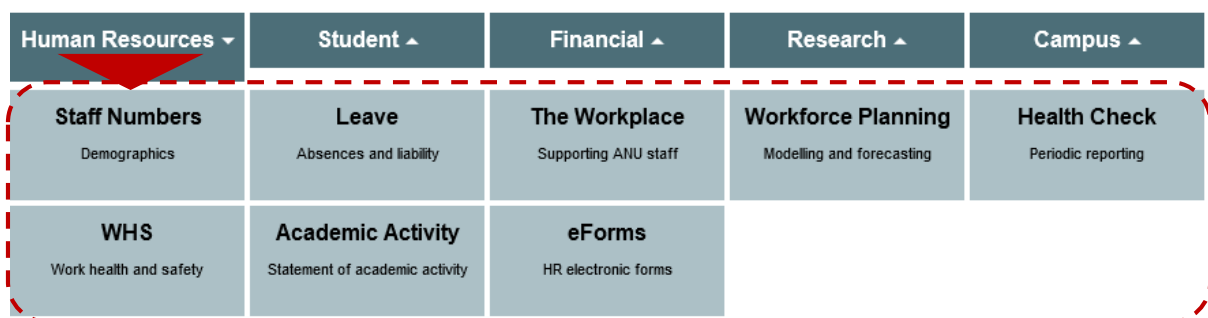
The Navigation menu shown below is how you navigate to report content.



To access the **VaHA eForm list - upcoming end of appointment** 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 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.

The screenshot shows the 'Insight Home' navigation bar with 'Human Resources' selected. Below the navigation bar, the page title is 'Human Resources / eForms : HR electronic forms'. The main content is divided into two columns. The left column is titled 'Reports' and contains a list of links, each preceded by a magnifying glass icon. The link 'Visiting and Honorary Appointment eForm list - upcoming end of appointment' is circled in red. The right column is titled 'Further Analysis' and contains the text 'No links to further analyses are available.' Below this, there is a 'Help and Support' section with links for 'ANU Insight Help' and 'ANU Insight Training'. At the bottom of the right column, there is contact information: 'Email insight@anu.edu.au' and 'Phone 6125 8649'.

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.

This screenshot is identical to the one above, but with a mouse cursor pointing at the link 'Visiting and Honorary Appointment eForm list - upcoming end of appointment' in the 'Reports' list.

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.



The screenshot shows a message from the Australian National University (ANU) Insight system. At the top left is the ANU logo. To its right, the text reads "Australian National University" and "VISITING AND HONORARY APPOINTMENT EFORM LIST". Below this, the main heading is "Secured report - no records available". The message explains that reporting is restricted based on security in the HRMS. It lists two reasons: 1) The user does not have appropriate operator access or delegations in the HRMS, and 2) The user has appropriate access but there are no records. It also notes that changes in the HRMS are processed overnight and may take up to 24 hours to reflect. Finally, it provides contact information for 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.

Organisation: (Optional)

All colleges/portfolios

All schools/divisions

All schools/divisions

All departments/centres

Appointment type: (Optional)

- <<-POI type not captured>>
- Academic Visitor - 00062
- ANU College Student - 00013
- Campus Visitor - 00013
- Contractors and Consultants - 00022
- Distinguished Honorary Professor (Level E3) - 00055
- Emeritus Professor - 00050
- Former Staff With Access - 00020
- Honorary Associate Professor (Level D) - 00053
- Honorary Clinical Lecturer (Level B) - 00056

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

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

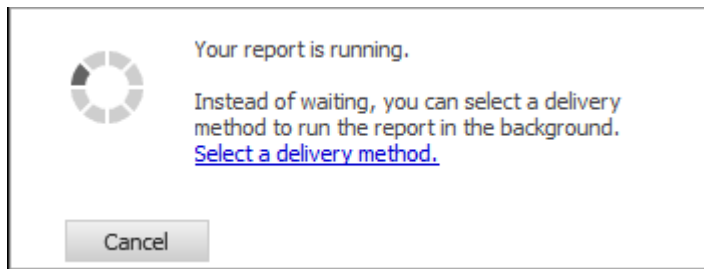
At all times at the very bottom of the prompt page, the prompt navigation buttons will show.



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:



VISITING AND HONORARY APPOINTMENT EFORM LIST - UPCOMING END OF APPOINTMENT

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

End date within one week (today to 7 days away)															
College/ portfolio	School/ division	Form ID	Request submitted date	Latest approval step	Appointee first name	Appointee last name	Form type	Appointment type	Appointment start date	Appointment end date	Appointment duration (days)	Total ANU expense amount	Nominator ID	Nominator name	Nominator position
College of Asia & the Pacific		1000002520	18/11/2015 9:28:31 AM	(Finish)	Tester	Tester	Professional	Campus Worker - 00012	18/11/2015	11/02/2016	85				

End date within one month (8 to 30 days away)															
College/ portfolio	School/ division	Form ID	Request submitted date	Latest approval step	Appointee first name	Appointee last name	Form type	Appointment type	Appointment start date	Appointment end date	Appointment duration (days)	Total ANU expense amount	Nominator ID	Nominator name	Nominator position
Administrative Support		1000002546	07/12/2015 2:20:24 PM	Appointee Acceptance			Professional		31/12/2015	25/02/2016	56	-			
Administrative Support		1000002181	14/10/2015 11:13:16 AM	(Finish)			Extension		31/10/2015	29/02/2016	121	-			

End date more than one month (31+ days away)															
College/ portfolio	School/ division	Form ID	Request submitted date	Latest approval step	Appointee first name	Appointee last name	Form type	Appointment type	Appointment start date	Appointment end date	Appointment duration (days)	Total ANU expense amount	Nominator ID	Nominator name	Nominator position
Administrative Support		1000002557	07/12/2015 2:48:47 PM	Appointee detail entry			Academic		07/12/2015	06/03/2016	90	-			

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:



The screenshot shows the header of the 'VISITING AND HONORARY APPOINTMENT EFORM LIST - UPCOMING END OF APPOINTMENT' report. It includes filters for 'Organisation: All ANU' and 'Appointment type(s): All appointment types'. Below the filters is a table with the following columns: College/portfolio, School/division, Form ID, Request submitted date, Latest approval step, Appointee first name, Appointee last name, Form type, Appointment type, Appointment start date, Appointment end date, Appointment duration (days), Total ANU expense amount, Nominator ID, Nominator name, and Nominator position. The 'Form ID' column contains a blue hyperlinked cell with the value '1000002520'. A mouse cursor is pointing at this cell.

College/portfolio	School/division	Form ID	Request submitted date	Latest approval step	Appointee first name	Appointee last name	Form type	Appointment type	Appointment start date	Appointment end date	Appointment duration (days)	Total ANU expense amount	Nominator ID	Nominator name	Nominator position
College of Asia & the Pacific	College Asia/Pacific General	1000002520	18/11/2015 9:28:31 AM	(Finish)	Teacher	Teacher	Professional	Campus Visitor - 00013	18/11/2015	11/02/2016	95	0.000	00070000	Contracting Works	General Staff - CAP College Administration (100) Consultant

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.

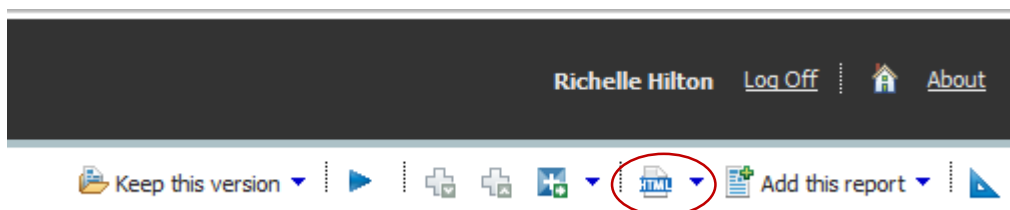
Save, Print, Annotate & Send


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:



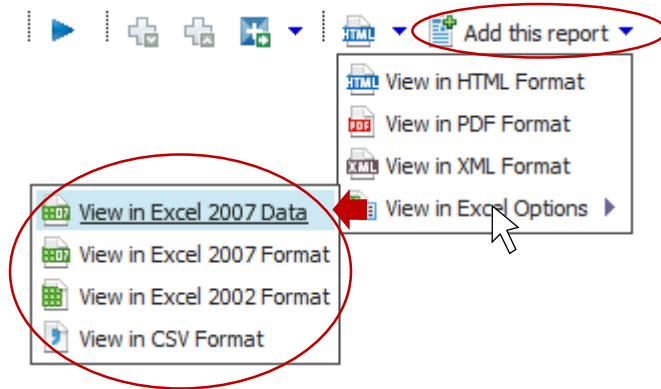
The report action menu can be found on the upper right of the screen under the Report Viewer header.



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.