

Step by step instructions

Running the Visiting and Honorary Appointment (VaHA) eForm list 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

- This report provides a list of all VaHA applications submitted using the ANU eForm for appointee/Honorary Appointment.
- User can drill-through to VaHA eForm detail report.

Logging into Insight

The **VaHA eForm list 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 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 menu contains buttons for 'Human Resources', 'Student', 'Financial', 'Research', and 'Campus'. Underneath, there 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', all dated 30/09/2015. The bottom section is divided into three columns: 'Recently accessed reports', 'My frequently accessed reports', and 'Recommended reports'. Each column lists reports with search icons and links, such as 'List of course enrolments', 'Low enrolled courses report', 'Subproject report pack', 'Project report pack', and '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

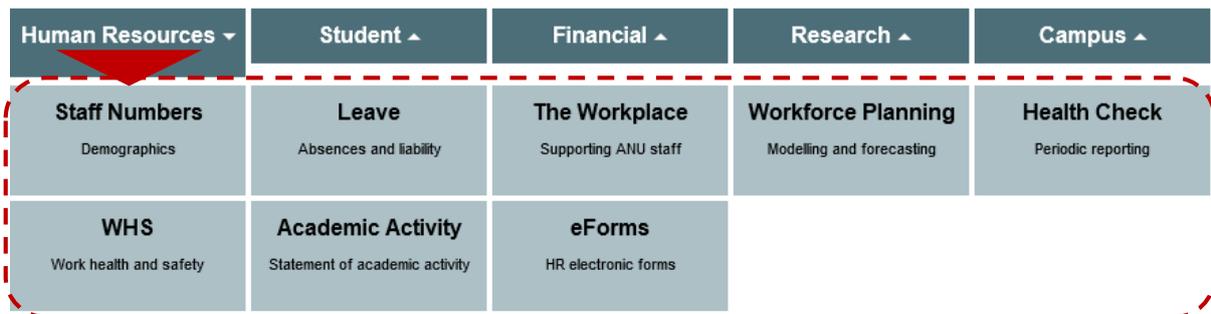
The Navigation menu shown below is how you navigate to report content.



To access the **VaHA eForm list** 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** 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.

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

Running a report

The **Visiting and Honorary Appointment eForm list** can be seen at the bottom 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](#)
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Further Analysis

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To run the **Visiting and Honorary Appointment eForm list** 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, the following secure message will appear.



VISITING AND HONORARY APPOINTMENT EFORM LIST

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.

Form submitted date: (Optional)
From:
 Earliest date
To:
 Latest date

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** 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.

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.**

- 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 VaHA eForm list to include requests submitted within the specified date range. An alternative option, is the user can 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.

The screenshot shows a form section titled "Request submitted between: (Optional)". It contains two date selection fields: "From:" and "To:". Each field has a text input box with a date (01/01/2016 for From, 16/01/2016 for To) and a calendar icon. Below each field are two radio button options: "Earliest date" and "Latest date". The "From:" field has the "Earliest date" radio button selected, and the "To:" field has the "Latest date" radio button selected.

- 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.



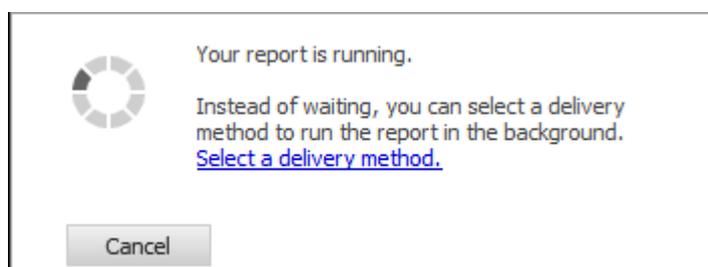
Cancel cancels the running of the report and will return you to the portal page

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 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

🚩 **Organisation:** All ANU
 🚩 **Form submit date:** All dates
 🚩 **Appointment type(s):** All appointment types

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	University Executive	1000001990	02/10/2015 4:07:05 PM	(Finish)	Greg	Thorn	Professional	Former Staff With Access - 00020	29/10/2015	29/10/2015	1	863	U-00000000	U-00000000	Academic Staff Vice-Chancellor's Office Vice-Chancellor and President
ANU College of Law	Legal Workshop	1000001953	01/10/2015 10:52:49 AM	(Finish)	Jess	Thorn	Academic	Honorary Clinical Senior Lecturer (Level C) - 00057	08/10/2001	08/10/2001	5	1,234	U-00000000	U-00000000	Academic Staff Director Legal Workshop Research Fellow
Administrative Support	Administration & Planning	1000001994	02/10/2015 4:26:59 PM	(Finish)	Heidi	White	Professional	Contractors and Consultants - 00022	29/10/2015	29/10/2015	7	-	U-00000000	U-00000000	General Staff Organisational Change Senior Manager 1 (Admin)

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 🔽 **Form submit date:** All dates
🔽 **Appointment type(s):** All appointment types

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** (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:

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	University Executive	1000001190	02/10/2015 4:07:05 PM	(Finish)	Shay	Tham	Professional	Former Staff With Access - 00020	01/10/2015	29/10/2015	29	863	U000000	Shay, Shay	Academic Staff / Vice-Chancellor's Office / Vice-Chancellor and President
ANU College of Law	Legal Workshop	1000001191	01/10/2015 10:52:49 AM	(Finish)	Jane	Tham	Academic	Honorary Clinical Senior Lecturer (Level C) - 00557	01/10/2015	09/10/2015	9	1,234	U000000	Jane, Tham	Academic Staff / Director Legal Workshop / Research Fellow
Administrative Support	Administration & Planning	1000001194	02/10/2015 4:28:58 PM	(Finish)	Shay	Tham	Professional	Contractors and Consultants - 00022	01/10/2015	29/10/2015	29	-	U000000	Shay, Tham	General Staff / Organizational Change / Senior Manager 1 (Admin)

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:



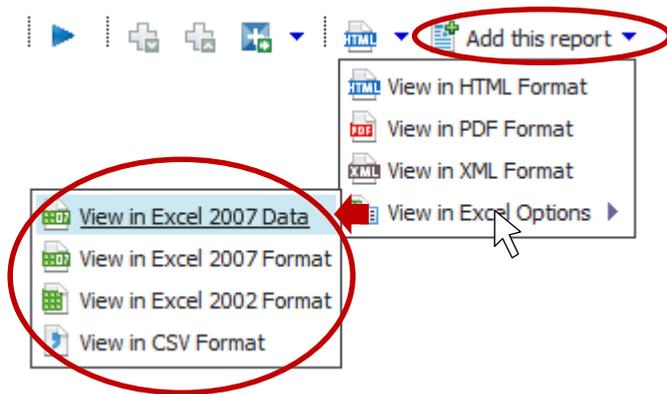
The report action menu can be found on the upper right of the screen under the Report Viewer header.



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 extracts the report into Excel but retains the report formatting.