Staff Connect
Self Service User Guide
Online Forms

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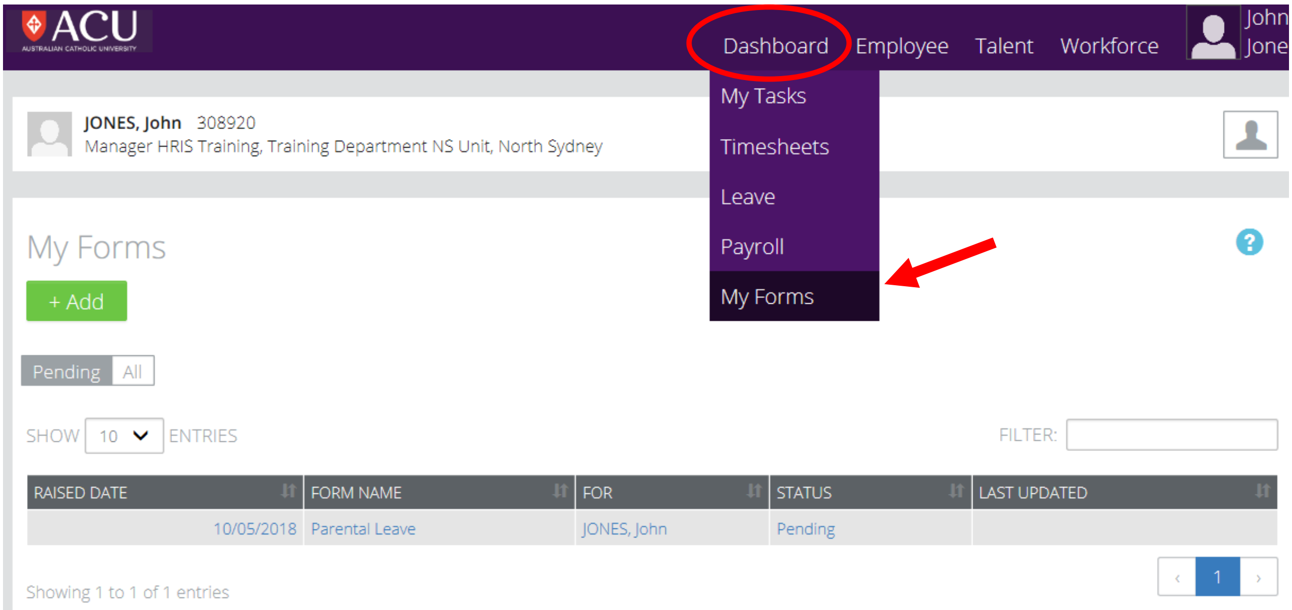
1. ONLINE FORMS

Online Forms in Staff Connect are electronic versions of former paper-based forms or questionnaires. The Online Forms may be divided into sections, and each section can contain instructional material or guidance on questions. For some online forms, sections may require completion and progressing to the next page to return other data or respond to question values that are input by you. Data is validated as you progress through a Form, and provides instant error feedback if you enter invalid data into a field.

The My Forms page displays all pending Forms that you can commence, or in the case of supervisors that you can commence to take an action for others.

To switch the view between Pending and All Forms, click the relevant button at the top of the page



Raise a Form

You can raise a Form for yourself or for a selected staff member that you supervisor. To raise a Form:

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click **Add**. The Create Form for <selected employee> page is displayed.

Click the **magnifying glass** or enter part of a Form folder's title in the Folder Filter if you wish to search for Forms in a specific folder. Matching folders are displayed.

Select the Folder you wish to search in from the drop-down list.

Click the **magnifying glass** or enter part of a Form's title in the Form field. Available forms are displayed.

Select the Form you wish to raise from the drop-down list and click **Next**. The raised Form is displayed ready for completion.

Completing Forms

You can submit, recall, cancel, and return Forms that you have raised or have been assigned to you.

When completing Forms, some fields may be mandatory and need to be completed before you can action a Form or move to the last page. Mandatory fields are marked on the Form.

You can only edit answers to a Form for which you are the subject. However, you can raise a Form for someone else if you are their supervisor, and add review comments before approving, declining or finalising a Form.

Update a Form

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to update. The Form Details: <form name> page is displayed.

Update the Form fields as required. Aurion validates the Form data as you progress, displaying an error message below any fields in error.

Click **Save** to save your changes.

Submit a Form

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to submit. The Form Details: <form name> page is displayed.

Click **Submit**. The submission page is displayed.

If the next person in the Form workflow is the logged on user, the Form is refreshed and redisplayed instead of being redirected to the submission page.

Enter a Message for the next recipient in the workflow, if required, and click **submit**. The form is forwarded to the next workflow recipient and moved from your Latest to Archived forms in the Tasks page.

Finalise a Form

A Form is ready to be finalised when it has reached the final recipient in the workflow. To Finalise a Form:

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to finalise. The Form Details: <form name> page is displayed.

Click **Finalise this Form**. The finalise this form page is displayed.

Click **Submit**. The form is moved from your Latest to Archived forms in the Tasks page.

Cancel a Form

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to cancel. The Form Details: <form name> page is displayed.

Click cancel. The Cancel: <form name>page is displayed.

Click **Submit**. The Form is removed from workflow.

Recall a Form

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to recall. The Form Details: <form name> page is displayed.

Click **Recall form**. The form is returned to you for action and the Form Details: <form name> page is displayed.

View a Form's Workflow

Click My Forms from the Dashboard menu. The My Forms page is displayed.

Click on the Form you want to view the workflow for. The Form Details: <form name> page is displayed.

Click the Summary tab. The Summary tab is displayed.

Select a row in the Workflow Tracking panel to view the details of a completed workflow action.

Working with Multiple Row Tables

Some Forms include tables with multiple rows.

Where a table has multiple rows, depending upon table configuration, you may be able to:

- add rows - when any row is selected the Add row button changes to Insert row, as shown below
- remove selected rows - if you delete all rows Self Service deletes all current rows then adds an empty row
- insert a row above the currently selected row, or above the highest selected row in the list if multiple rows are selected
- move selected rows up or down - if the selected row/s can't move up or down these buttons are disabled
- select all rows by clicking the checkbox at the top of the left column.

2. SUPERVISORS – ACTIONING A FORM

The My Tasks page allows you to manage Forms awaiting your attention. Forms contain questions, divided into sections that may contain instructional material or guidance for completing the Form.

Forms can be classified as Latest or Archived. Your latest Forms are displayed by default. To switch the view between Latest and Archived items click the relevant button at the top of the expanded Forms panel.

Process a Form

Select My Tasks from the Dashboard menu. The My Tasks page is displayed.

Click the Forms panel. Forms assigned to you are displayed.

Click the form you wish to process. The Form Details - <form name> <applicant> page is displayed.

Update data in the Form, if required, and click **Save**. Changes to the Form are saved.

Review the Form details and select the required option to:

Cancel - to cancel the Form. Cancelled Forms cannot be reopened.
Return form - to return the Form to the previous step and user in the workflow.
Submit - to send the Form to the next step in the workflow.
Finalise this form - to finalise the Form. This option is only available if you are the last step in the workflow .