

Staff Connect Self Service User Guide Staff Connect Reports Folder for Supervisors

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1. Introduction

1.1. The Basics

Reports can be run and delivered from the **Report Folders** within Staff Connect (**Workforce > Reports Folders**).

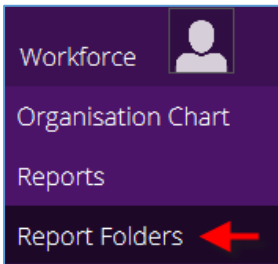
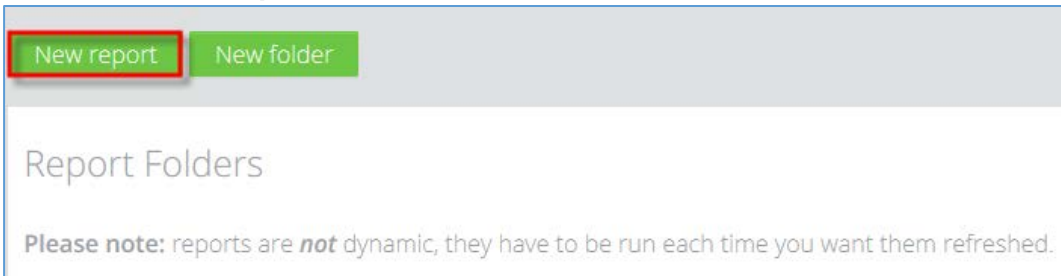
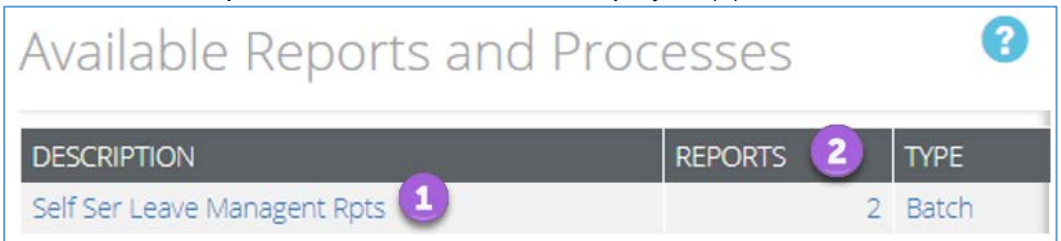
The content of each report available in Staff Connect is dictated by the data within the Human Resource system, Aurion and the security rights held by the user.

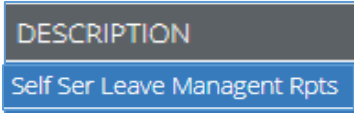
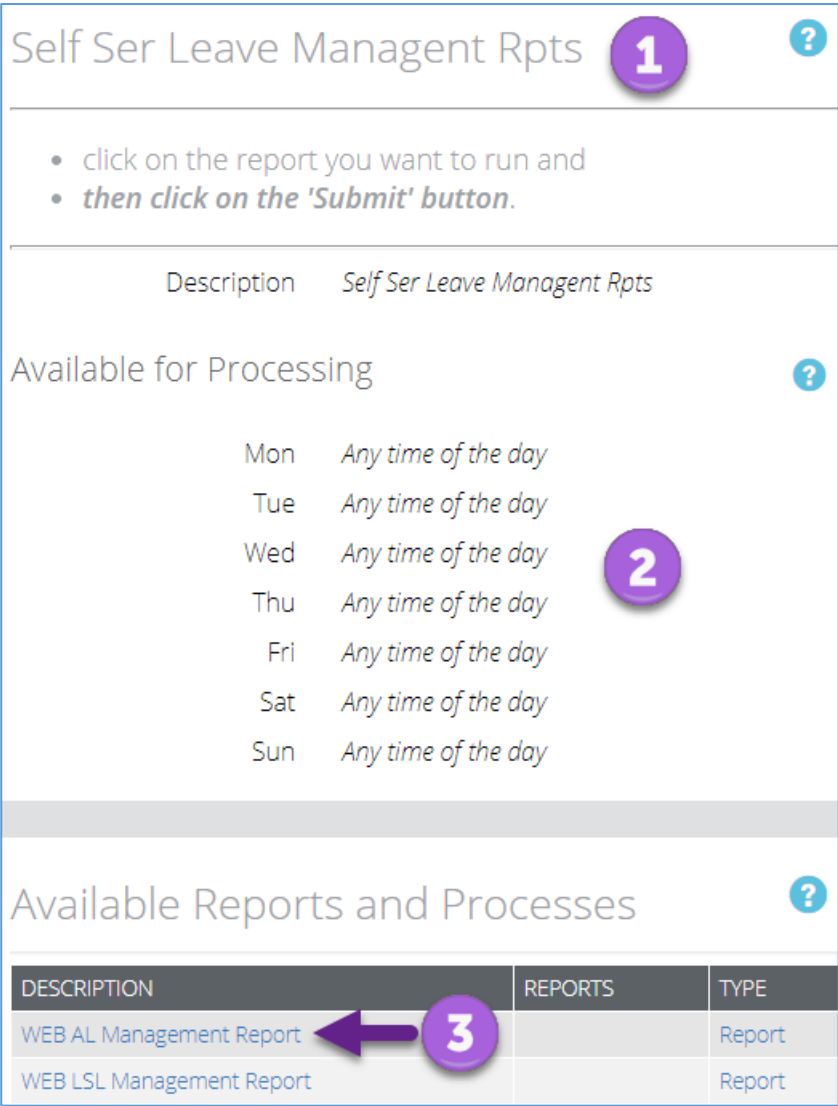
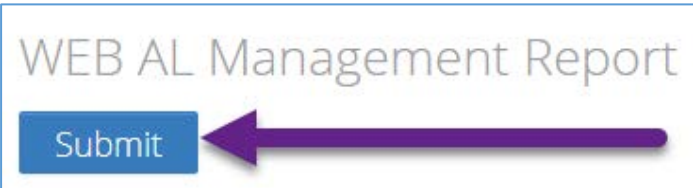
The reports available to each individual within Staff Connect depends on the position of the staff member within the organisation.

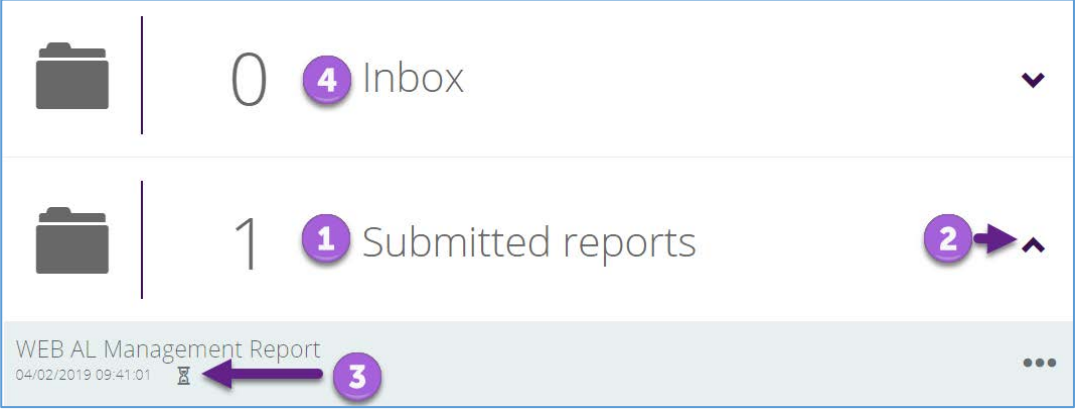
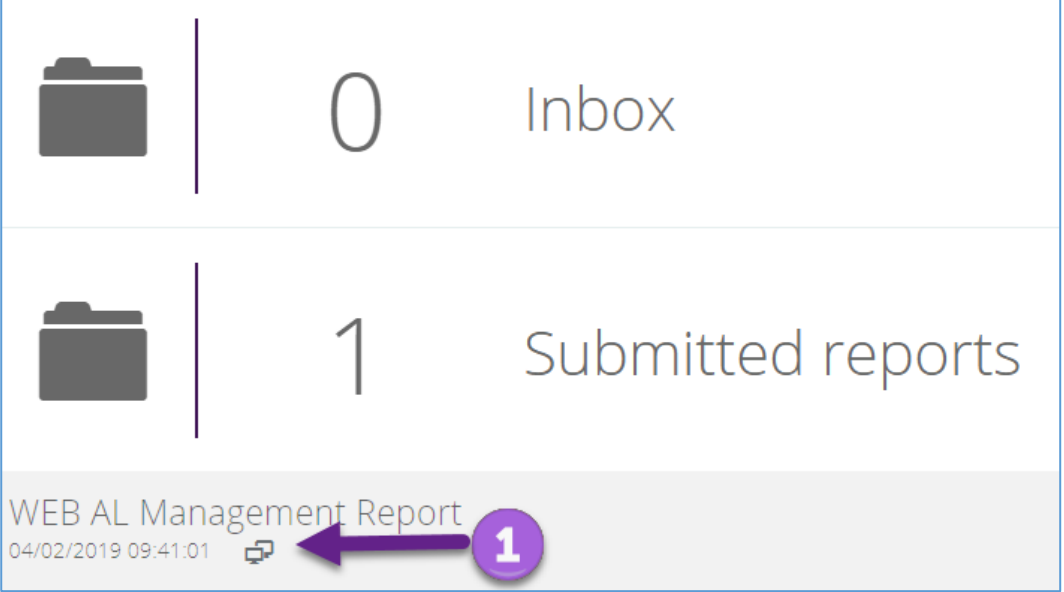
Reports will be made available by Human Resources to staff members or groups of staff members in relation to their position and organisational area within the University.

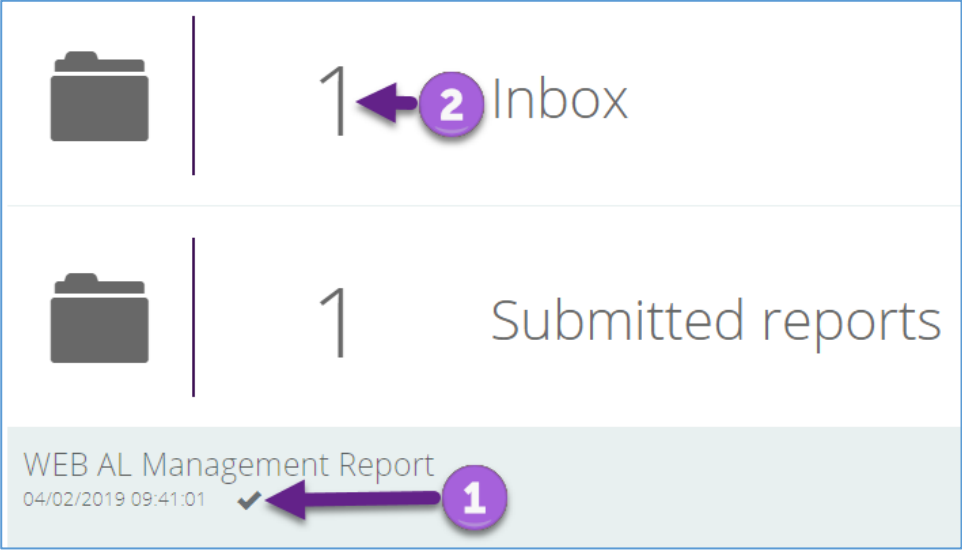
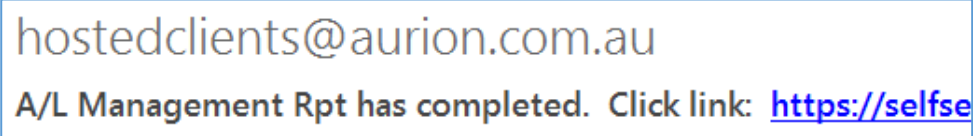
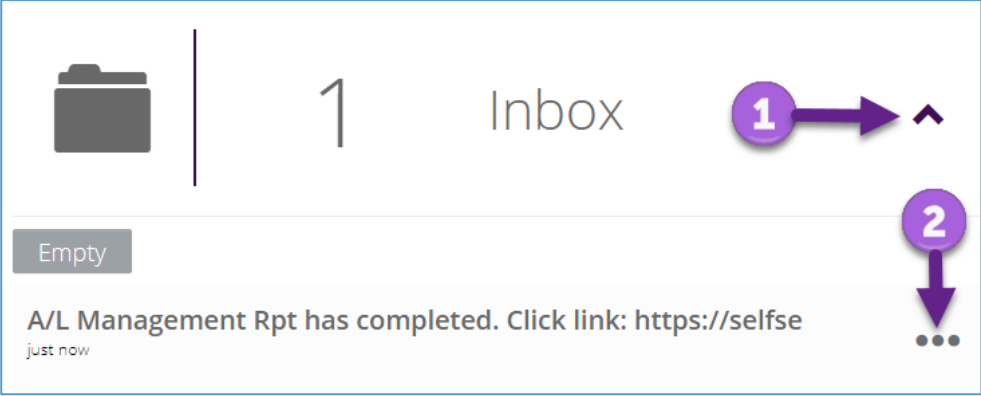

2. Workforce > Reports Folders

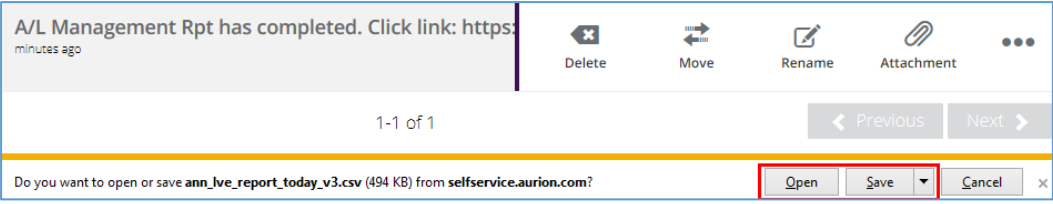
2.1. Running a Report

Step	Description
2.1.01	Log into Staff Connect
2.1.02	Click on menu Workforce > Report Folders : 
2.1.03	Click on the New report button: 
2.1.04	Report folders available to the position the user is attached to will be displayed (1). The number of reports in each folder is also displayed (2): 

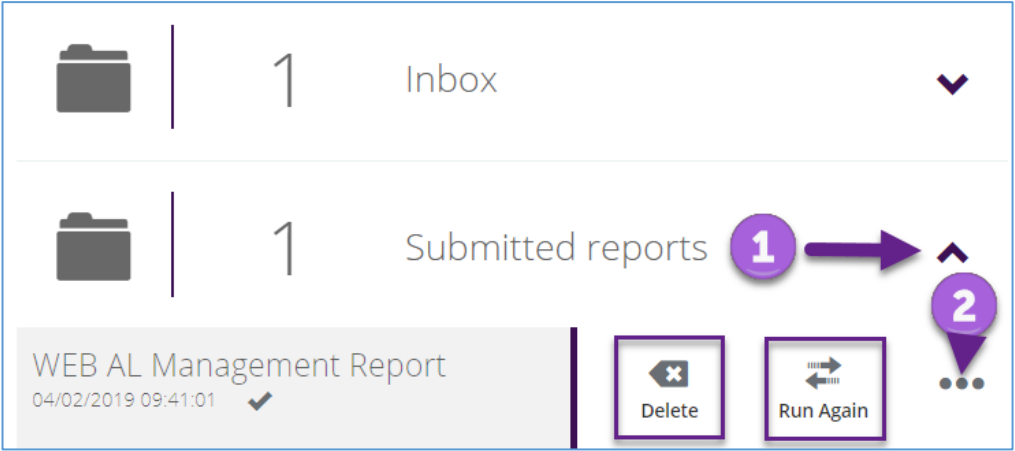
2.1.05	<p>Click on a folder containing the required report.</p> 
2.1.06	<p>The folder information is displayed.</p> <p>(1) The folder name is displayed.</p> <p>(2) Any restrictions on when the report can be run will be shown.</p> <p>(3) The available reports in the folder are shown. Select a report to run by clicking on the blue hyperlink text.</p> 
2.1.07	<p>The report Information is now displayed.</p> <p>Click the Submit button to run the report.</p> 

2.1.08	The Report Folders screen will now be visible again.
2.1.09	<p>The Submitted reports folder now displays a count (1). Clicking on the dropdown arrow next to Submitted reports will display the reports that have been submitted or previously run (2). (3) The hourglass icon next to the report confirms your report has been queued and is compiling. When the report is delivered the Inbox (4) it will also display a count.</p> 
2.1.10	<p>The submitted report will now run irrespective of whether you remain logged into Staff Connect or not. Submitted reports can take some time to run depending on the one selected. Multiple reports can be submitted without waiting for the previously submitted reports to have completed. Refresh your Staff Connect screen (Press F5 on the keyboard) to view updates related to the Submitted Reports Folder. Two computer screen icons will appear next to reports to indicate the report is now currently being processed. (1)</p> 

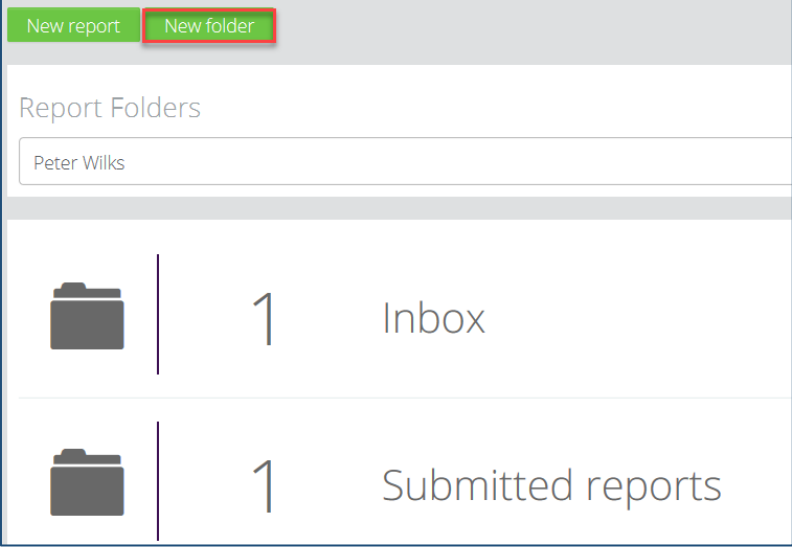
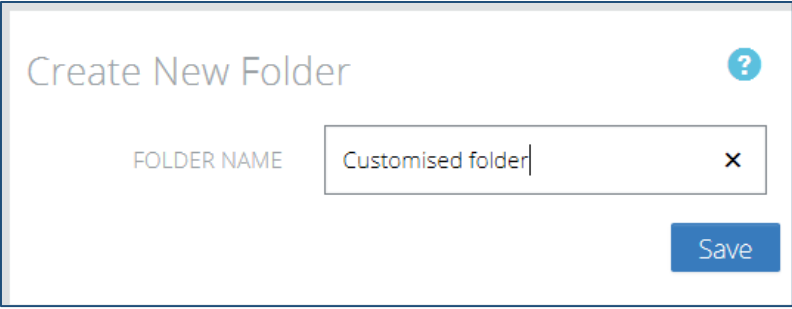
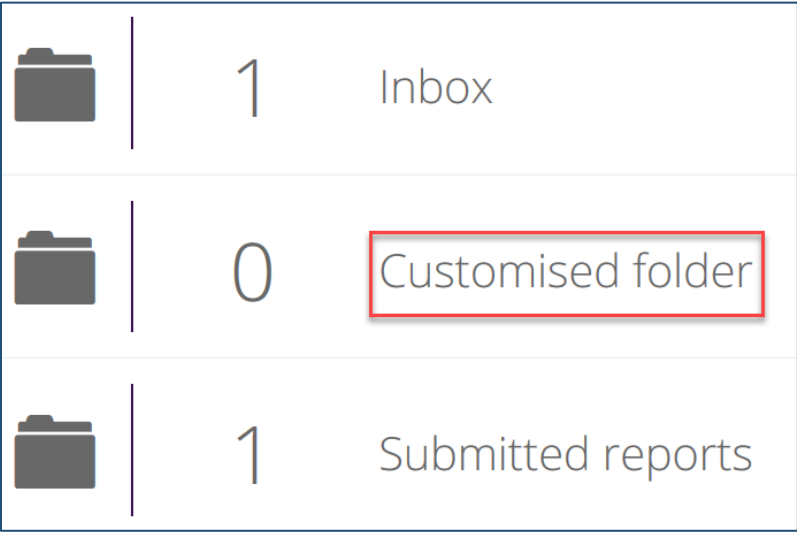
2.1.11	<p>The Staff Connect screen needs to be periodically refreshed to update the view (Press F5 on the keyboard). A Tick will appear beside the report name to indicate the report has run successfully. (1) Refreshing the screen will also update the Inbox information to indicate a report has been received (2).</p> 
2.1.12	<p>An email notification will also be delivered in Outlook to advise that the report has successfully completed and can now be viewed within Staff Connect.</p> 
2.1.13	<p>Click the downward facing arrow to see the completed report in the Report folders Inbox. (1) The report will be displayed. Click on the ellipses (...) for report options (2).</p> 
2.1.14	<p>The options are as displayed:</p> 

2.1.15	<p>Clicking Attachment will allow you to open or save the file.</p> 
2.1.16	<p>To run another report or the same report again return to step 2.1.03. For an alternative method of rerunning reports see 2.2.</p>

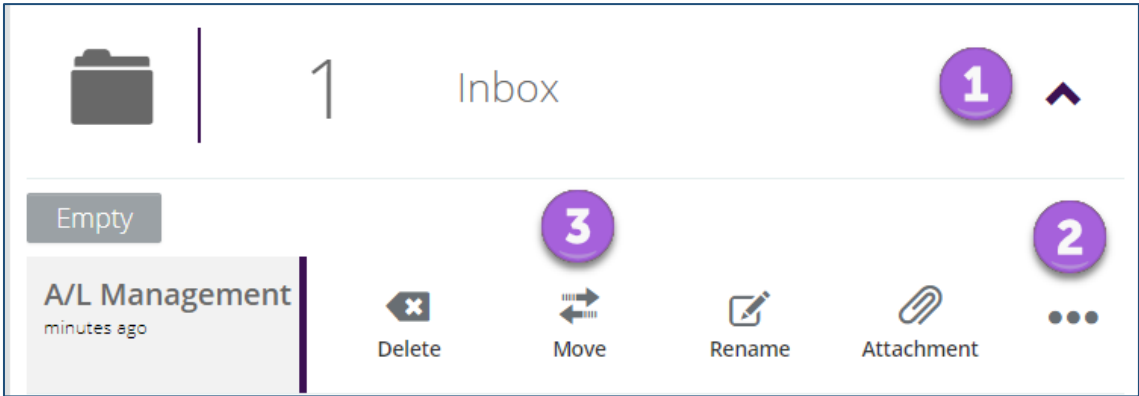
2.2. Rerunning or Deleting a Previously Submitted Report

Step	Description
2.2.01	<p>Click the downward facing arrow beside the Submitted reports folder (1). It will turn into an upward facing arrow and the previously run report will be visible. The two options to Run Again or Delete the report are available when you click on the ellipses (...) (2).</p> 
2.2.02	<p>The Run Again option submits the report again and will produce a new file delivered to the Reports folders Inbox and will include any changes to data since the last time the report was run.</p> <p>Please note: reports are <i>not</i> dynamic, they must be <i>run each time you want them refreshed</i>.</p> <p>Deleting the report will delete the information about the previously submitted report.</p>

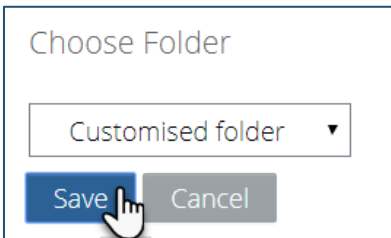
2.3. Other Functions of the Report Folder

Step	Description
2.3.01	<p>The New folder button is also present in the Workforce > Reports Folder menu of Staff Connect.</p>  <p>The screenshot shows the 'Report Folders' section for 'Peter Wilks'. At the top, there are two buttons: 'New report' (green) and 'New folder' (grey with a red border). Below this is a list of folders: 'Inbox' with a count of 1, and 'Submitted reports' with a count of 1.</p>
2.3.02	<p>Click the New folder button to create a customised folder to store a report.</p>  <p>The screenshot shows a 'Create New Folder' dialog box. It has a title bar with a question mark icon. Below the title is a text input field labeled 'FOLDER NAME' containing the text 'Customised folder'. There is a blue 'Save' button at the bottom right.</p>
2.3.03	<p>When the Save button is clicked the customised folder will appear between the inbox and the Submitted reports folder.</p>  <p>The screenshot shows the 'Report Folders' section after the custom folder has been created. The list now includes 'Inbox' (1), 'Customised folder' (0, highlighted with a red border), and 'Submitted reports' (1).</p>

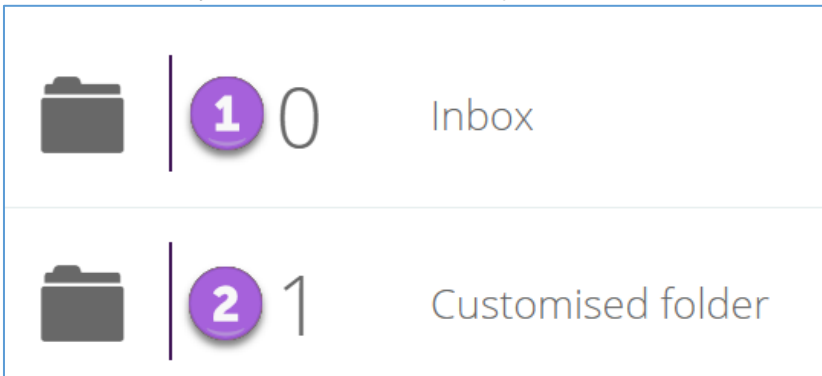
2.3.04 To move a report into the newly created folder, return to the **Inbox** (1), select the **ellipses** (2) and select the **Move** icon (3).



2.3.05 The option to **Choose Folder** from a drop-down list will display. The **Customised folder** can be selected and then the **Save** button clicked.

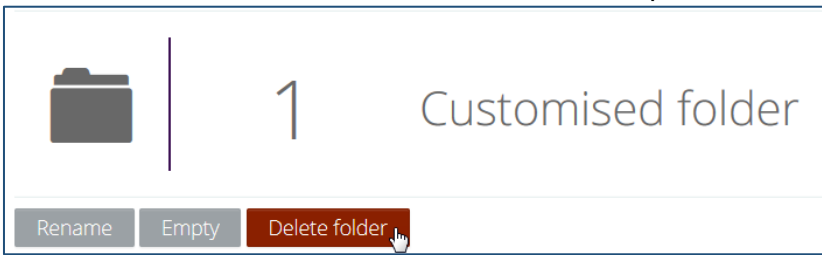


2.3.06 The number count beside the Inbox should decrease (1) and a new number count beside the Customised folder will appear (2). The report can now be stored and accessed at any time within this folder just as it was in the **Inbox**.

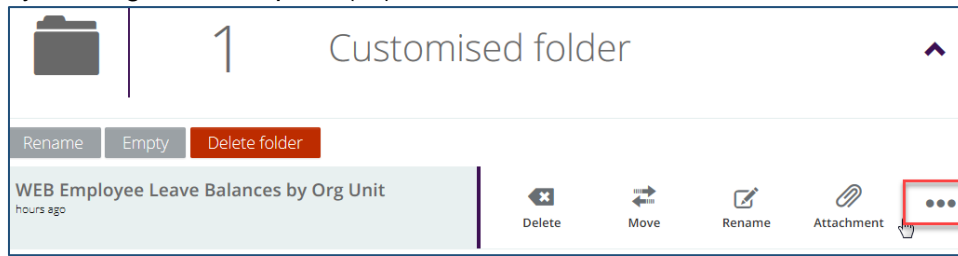


Please note: reports are *not* dynamic, they must be run each time updated data is required, therefore reports in any customised folders will continue to show data from the date and time the report was initially run.

2.3.07 The options available in the newly created folder are **Rename**, **Empty** and **Delete Folder**. Therefore, the folder can be renamed, emptied, or deleted at any time.



2.3.08 The report in the Customised folder has identical options as the inbox when displayed by clicking on the ellipses (...).



Document end.