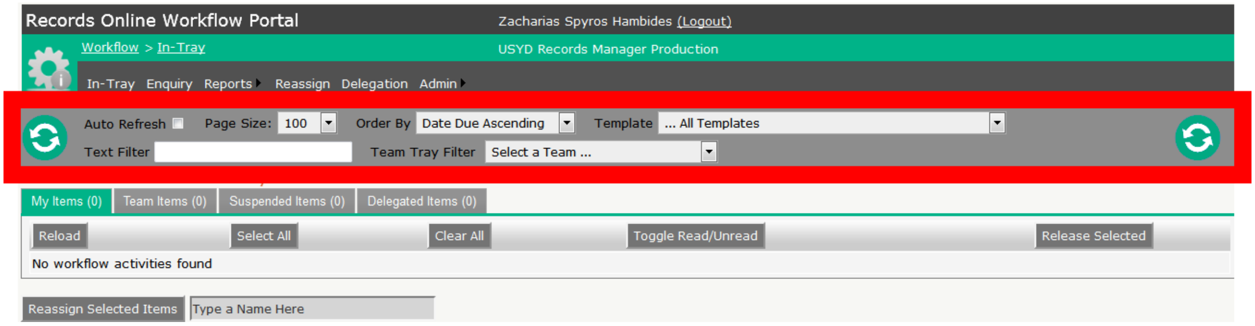
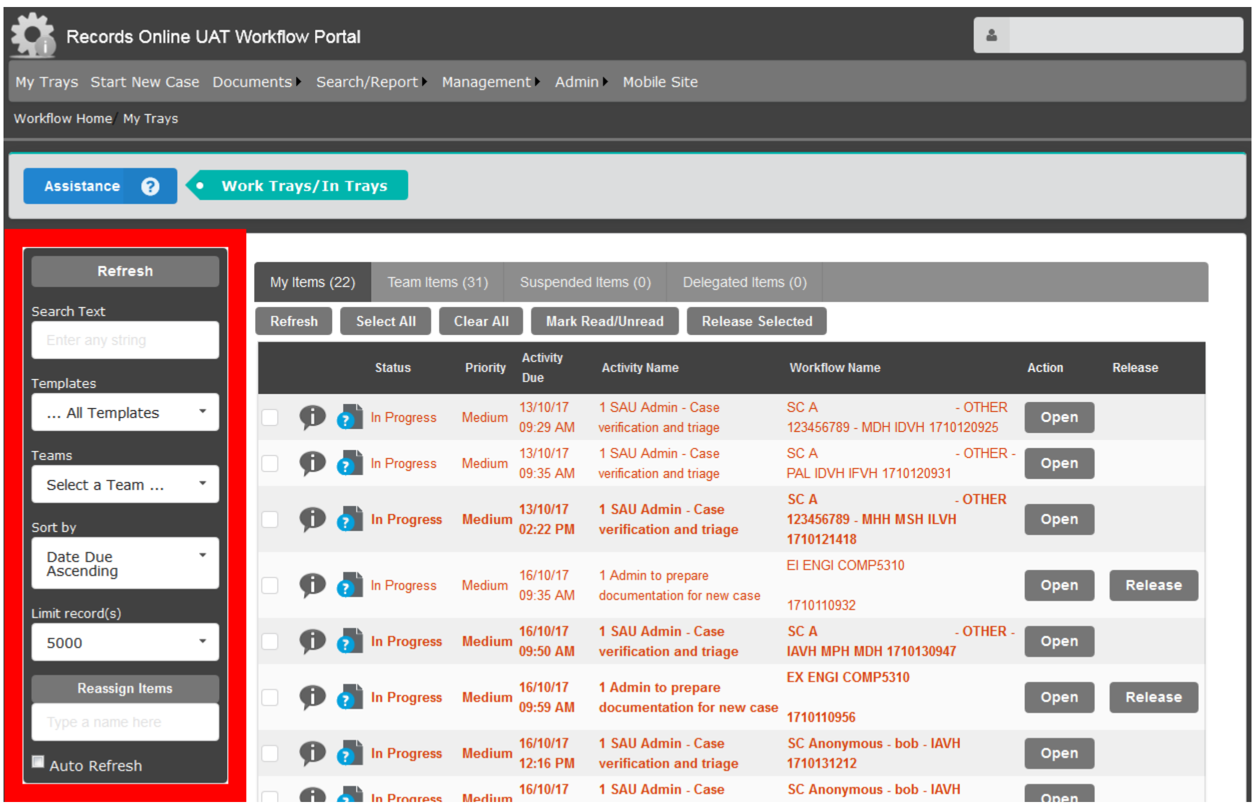
Introducing the new Records Online Workflow Portal

The **PREVIOUS VERSION** of the Records Online Workflow Portal had the menu bar at the top of page, as shown in the red box we added to the image below.



In the **NEW VERSION** the menu bar has moved to left hand column, as shown in the red box we added to the image below.



For technical issues or to request training please call 9351 3174 or email records.online@sydney.edu.au.

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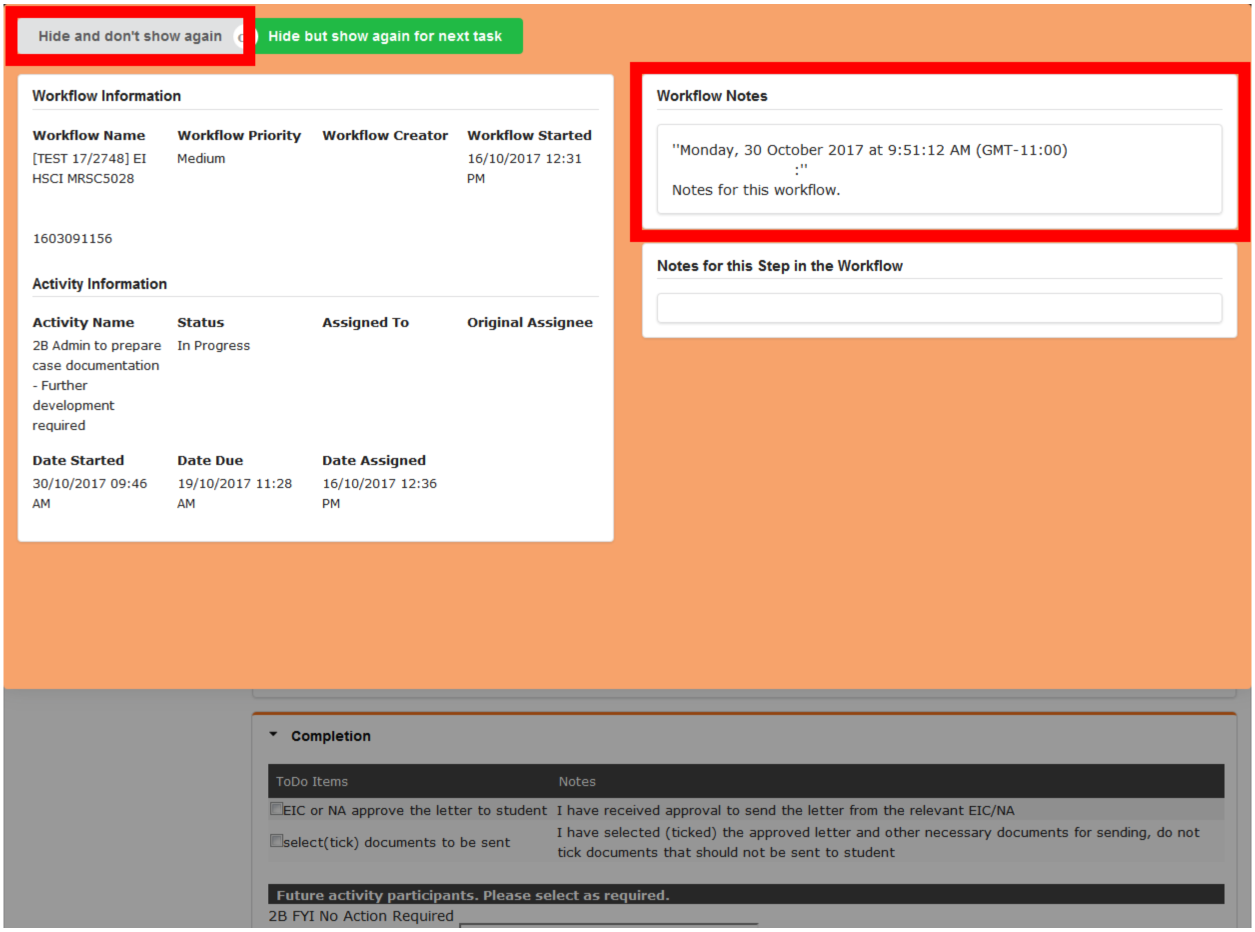
The first time you open a case in a new browser you will see the orange **SUMMARY** splash screen. This is an easy way to view the **WORKFLOW NOTES** though we recommend selecting **HIDE AND DON'T SHOW AGAIN** as shown in the red boxes we added below.



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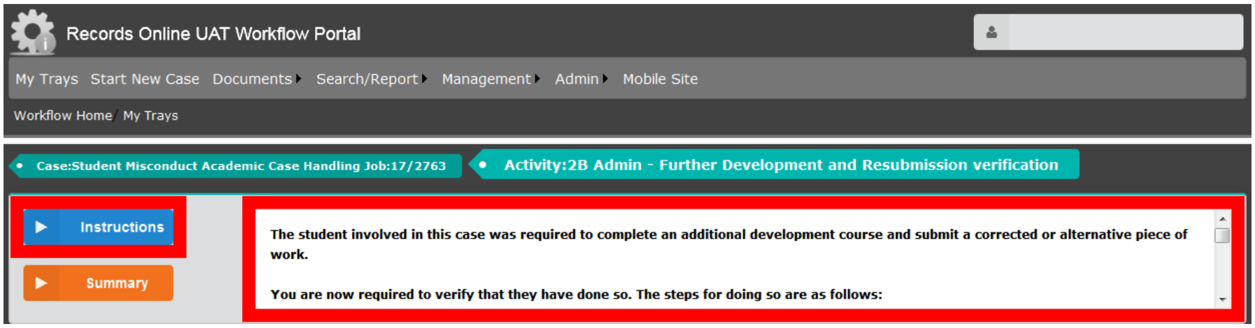
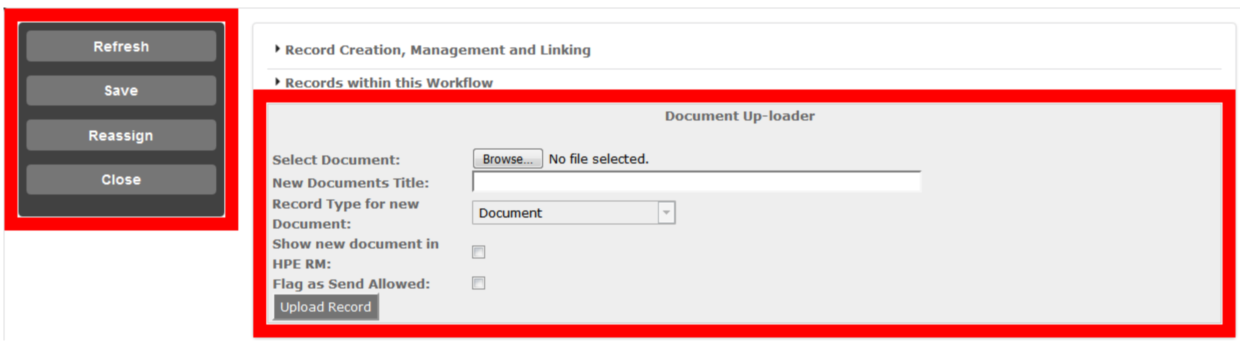
While all the functions from the previous Portal have been preserved the look and feel of how to get to them has changed. The **INFORMATION BAR** at the top of the page is largely unchanged except for the **INSTRUCTIONS,** which are now available via the blue **INSTRUCTIONS** button on the left or the **SCROLLABLE WINDOW** on the right as shown in the red boxes we added to the screenshot below.



The **MIDDLE SECTION** is where you will do most of your work in the new Portal. Note the **DOCUMENT UP-LOADER** is the same, as shown in the red box on the right hand side of the screenshot below. In addition, the options that used to be at the bottom of the page are now situated in the left-hand column.



Please note:

- **REFRESH**: Updates the workflow, including any documents edited in **HPCM**.
- **SAVE**: Preserves changes and closes the workflow with option to **SET PERCENTAGE COMPLETE**.
- **REASSIGN**: Changes who the workflow is assigned to for the **CURRENT ACTIVITY**.
- **CLOSE**: Deletes any Workflow Notes not added to the workflow and **CLOSES WORKFLOW**.

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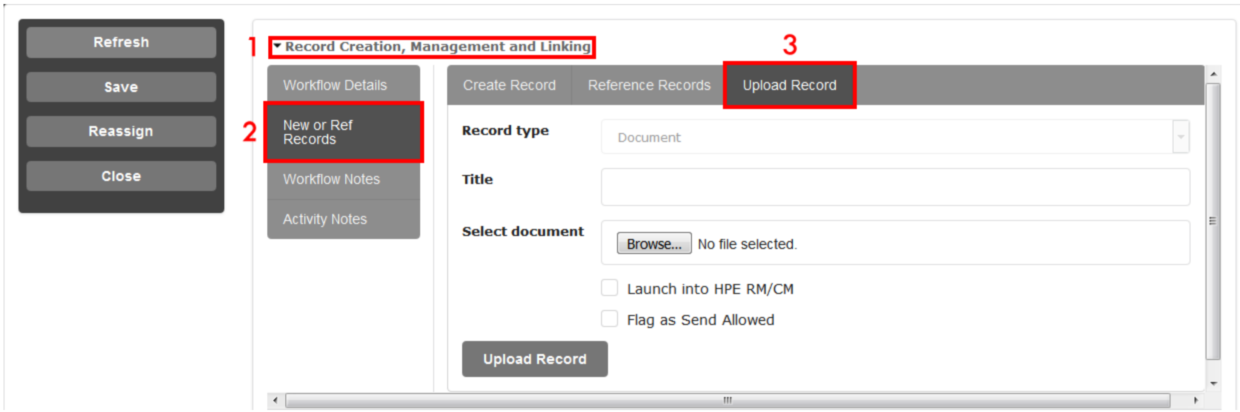
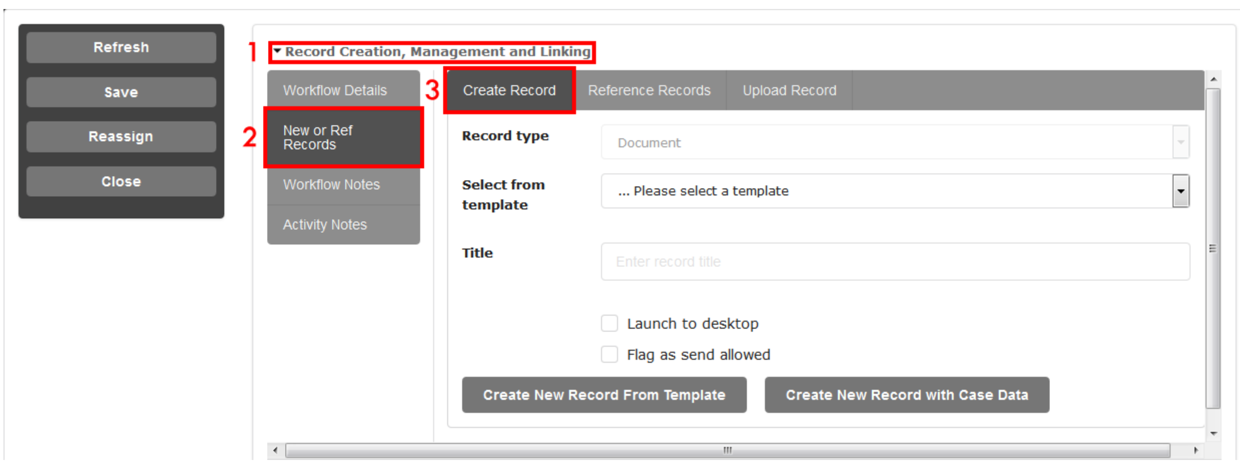
You still have two options for **UPLOADING DOCUMENTS** but the look and feel of how to access the second option has changed. To access the new uploader please see the instructions and screenshot below:

1. Click on **RECORD CREATION, MANAGEMENT AND LINKING** to expand the section.
2. Click **NEW OR REF RECORD** from the column on the left.
3. Select the **UPLOAD RECORD** tab.



The new **TEMPLATE GENERATOR** is in the same section as the uploader so you can switch between the two. To access the generator please follow the instructions below:

1. Click on **RECORD CREATION, MANAGEMENT AND LINKING** to expand the section.
2. Click **NEW OR REF RECORDS** from the column on the left.
3. Select the **CREATE RECORD** tab.



Follow the same procedure for uploading documents and generating templates with case data as in the previous version of the Portal.

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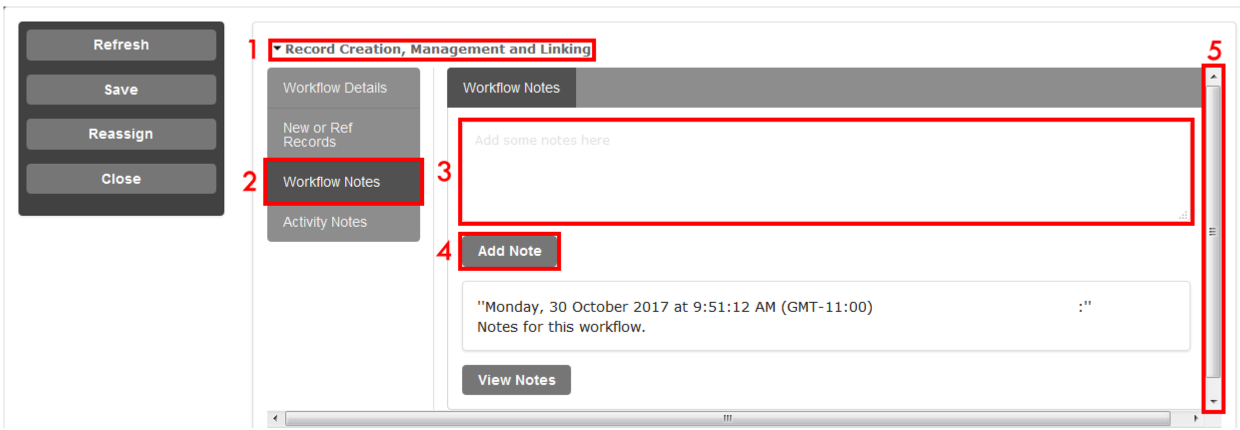
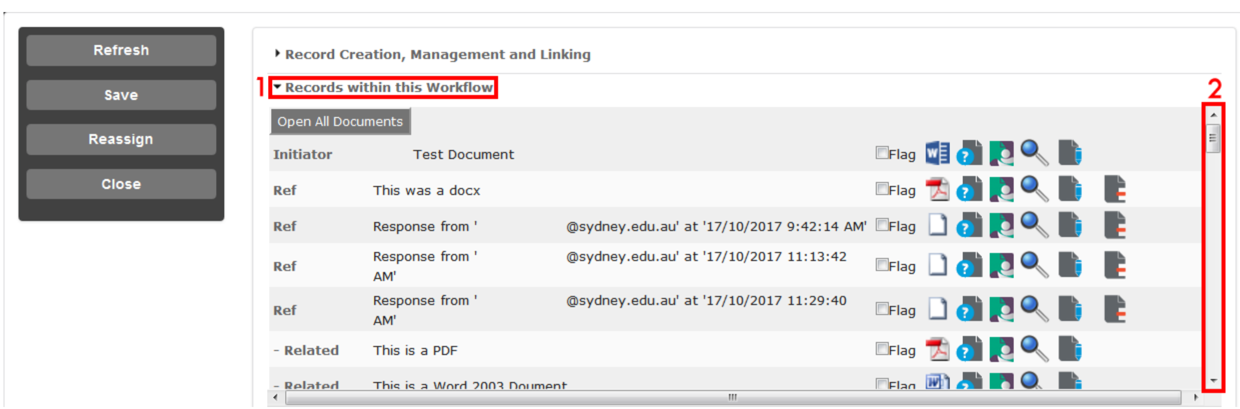
There are still two ways to add **WORKFLOW NOTES** but again the look and feel has changed. To add notes without completing the activity please refer to the instructions and screenshot below:

1. Click on **RECORD CREATION, MANAGEMENT AND LINKING** to expand the section.
2. Click on **WORKFLOW NOTES** from the column on the left.
3. Enter your notes in the text field provided.
4. Click **ADD NOTE**.
5. Use the scroll bar on the right to view all workflow notes.



To view all **WORKFLOW DOCUMENTS** please refer to the instructions and screenshot below:

1. Click **RECORDS WITHIN THIS WORKFLOW** to expand the section.
2. Scroll down to view all documents.



Please note:

Icon	Action
Flag	Document is **FLAGGED** for sending
	Indicates document **TYPE** (.docx)
	Hover for **RECORD PROPERTIES**
	Opens document in **HPCM**
	Opens a **READ-ONLY** version of the document
	REMOVES document from Workflow but doesn't delete

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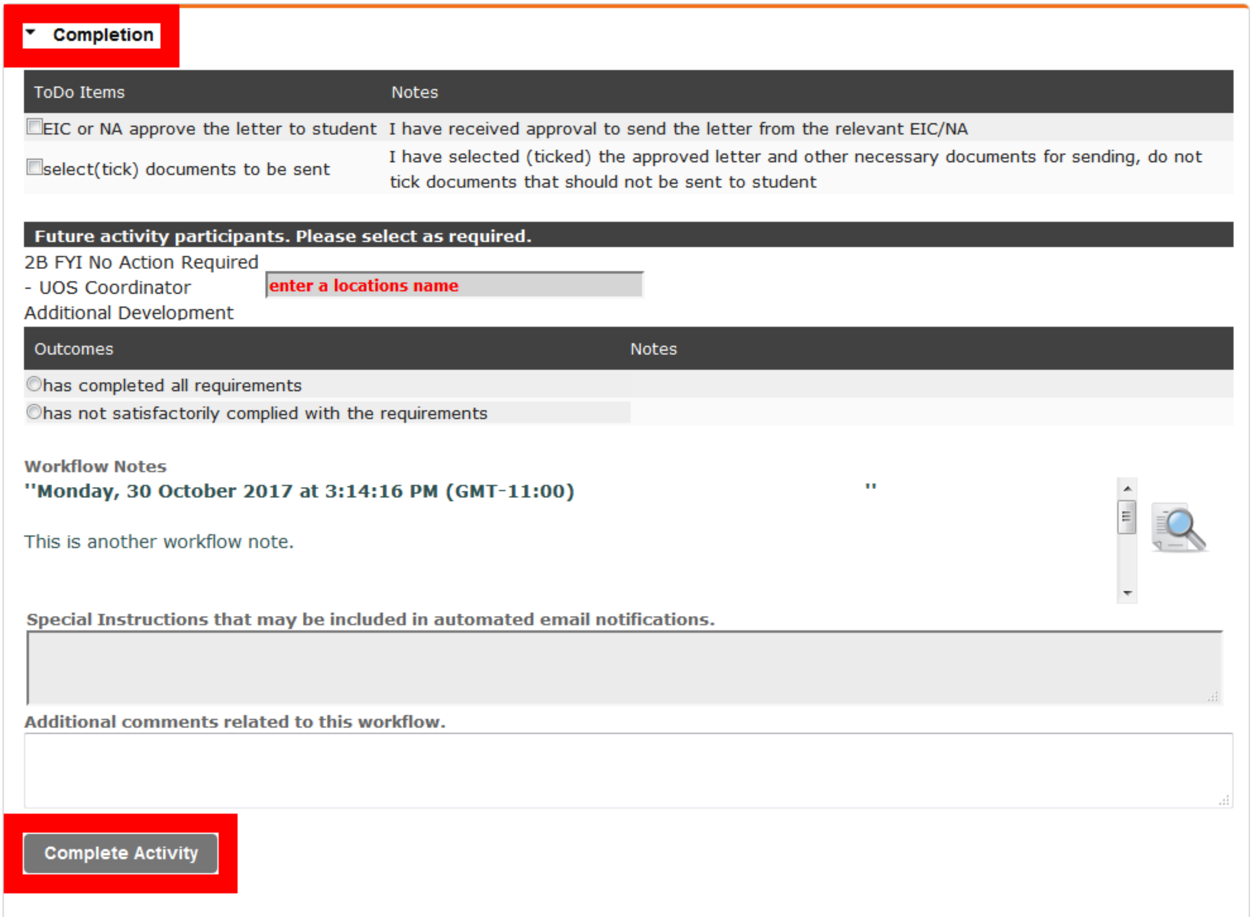
All remaining workflow features can be found in the **COMPLETION** section.

The Complete button has been moved to the bottom of the page and is now called **COMPLETE ACITIVTY**. All other features have been retained but are now in a slightly different format.



Note: This screenshot is an example where all features are shown but not all features will be displayed at every step.