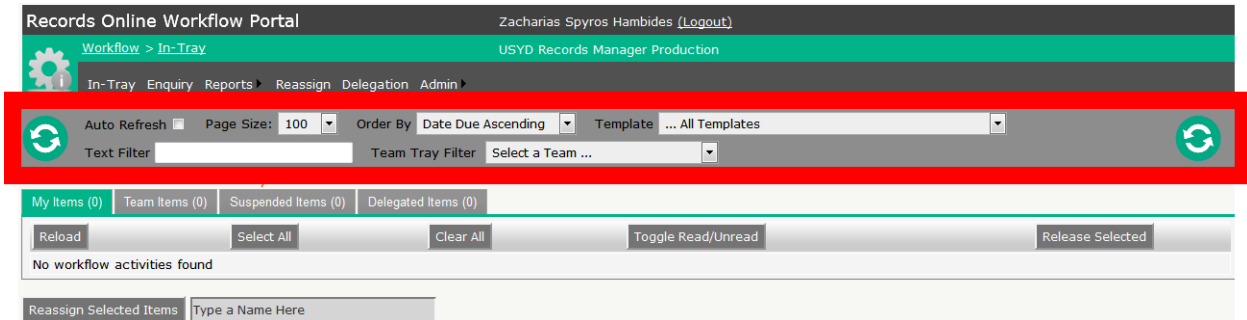
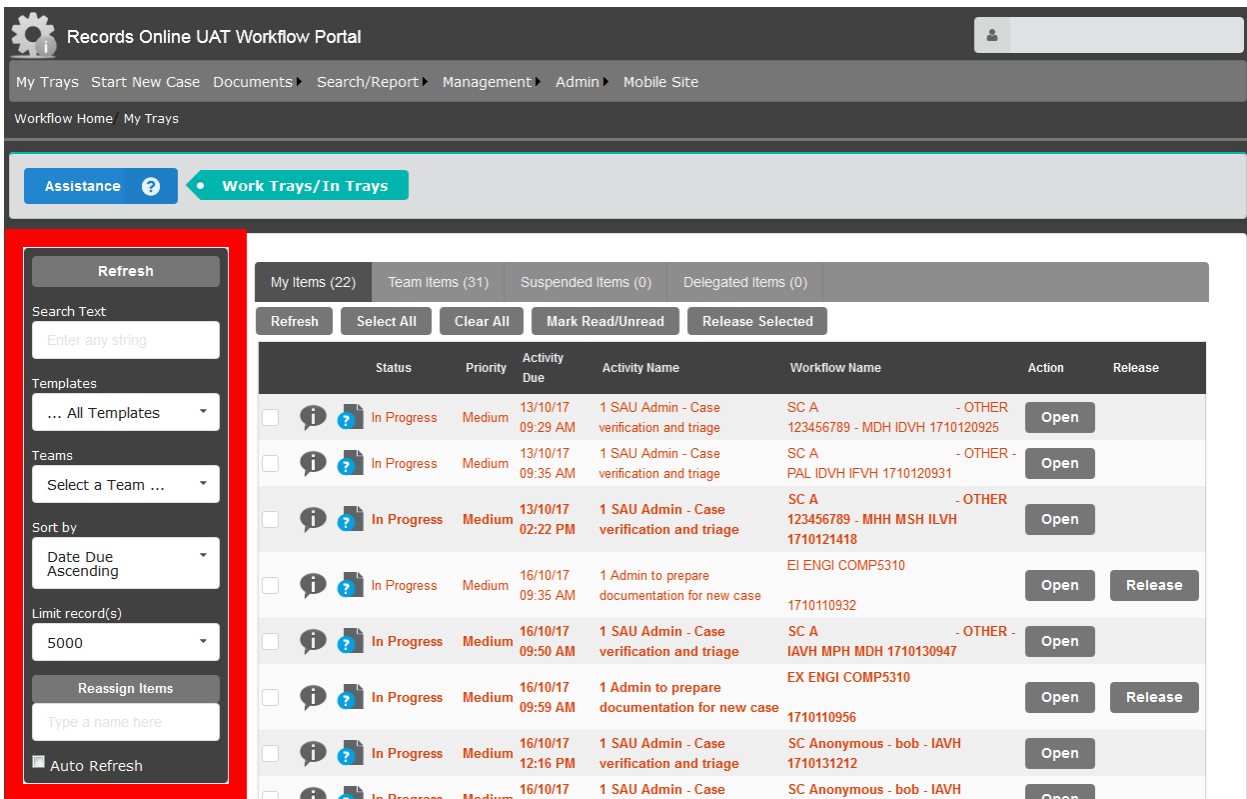


Introducing the new Records Online Workflow Portal

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.

Introducing the new Records Online Workflow Portal

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.

The screenshot displays the Records Online Workflow Portal interface. At the top, there are two buttons: "Hide and don't show again" (highlighted in a red box) and "Hide but show again for next task". Below these are two main panels. The left panel contains "Workflow Information" and "Activity Information". The right panel contains "Workflow Notes" (highlighted in a red box) and "Notes for this Step in the Workflow". At the bottom, there is a "Completion" section with a table of tasks.

Workflow Information

Workflow Name	Workflow Priority	Workflow Creator	Workflow Started
[TEST 17/2748] EI HSCI MRSC5028	Medium		16/10/2017 12:31 PM

1603091156

Activity Information

Activity Name	Status	Assigned To	Original Assignee
2B Admin to prepare case documentation - Further development required	In Progress		

Date Started	Date Due	Date Assigned
30/10/2017 09:46 AM	19/10/2017 11:28 AM	16/10/2017 12:36 PM

Workflow Notes

"Monday, 30 October 2017 at 9:51:12 AM (GMT-11:00) :"

Notes for this workflow.

Notes for this Step in the Workflow

Completion

ToDo Items	Notes
<input type="checkbox"/> EIC or NA approve the letter to student	I have received approval to send the letter from the relevant EIC/NA
<input type="checkbox"/> select(tick) documents to be sent	I have selected (ticked) the approved letter and other necessary documents for sending, do not tick documents that should not be sent to student

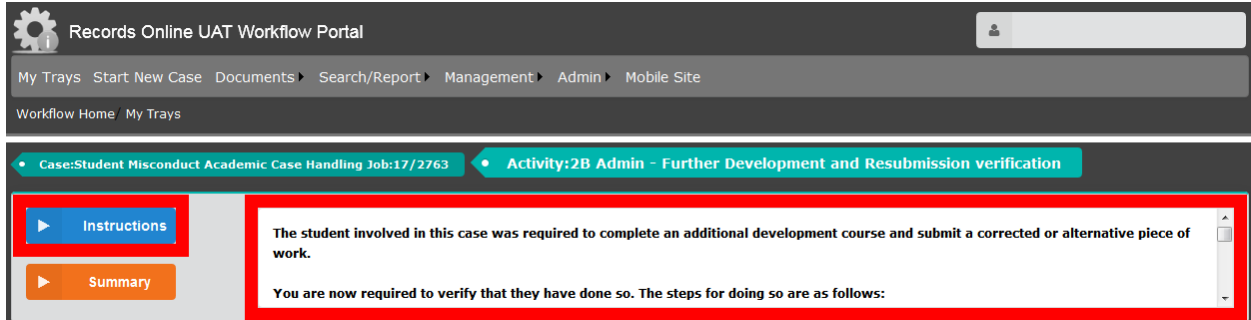
Future activity participants. Please select as required.

2B FYI No Action Required _____

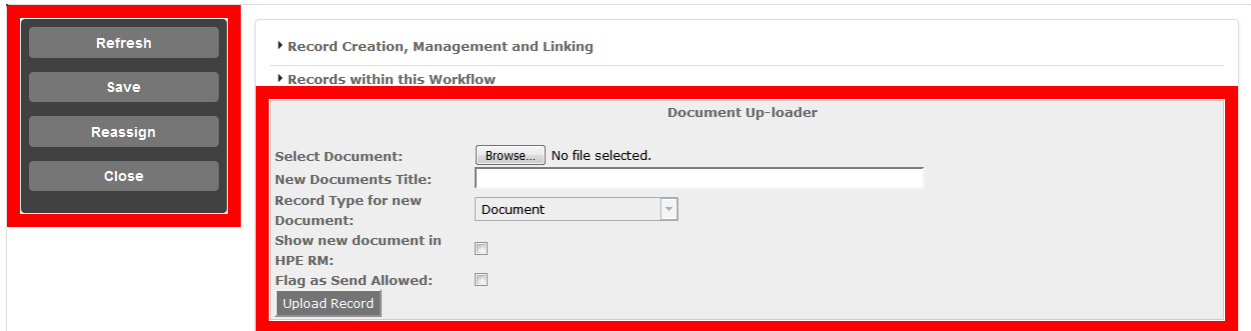
For technical issues or to request training please call 9351 3174 or email records.online@sydney.edu.au.

Introducing the new Records Online Workflow Portal

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.



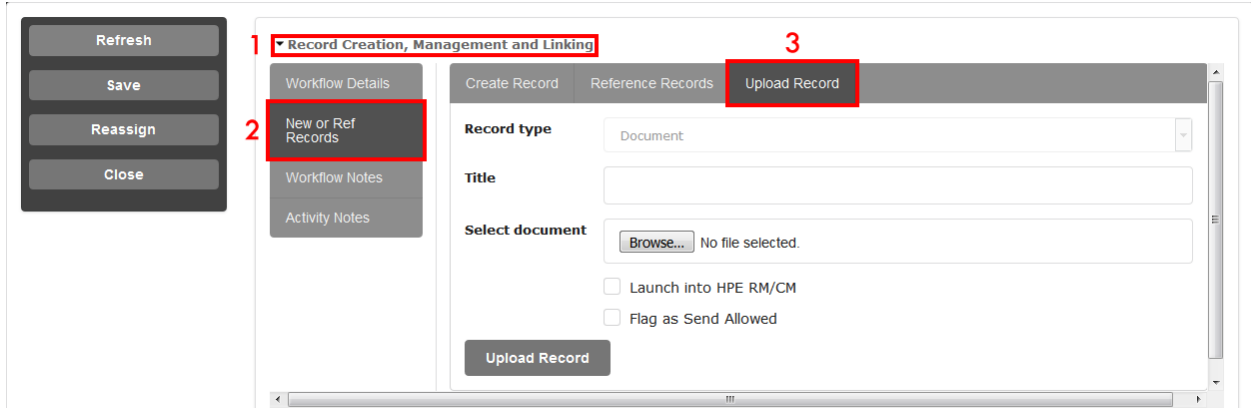
Please note:

- **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**.

Introducing the new Records Online Workflow Portal

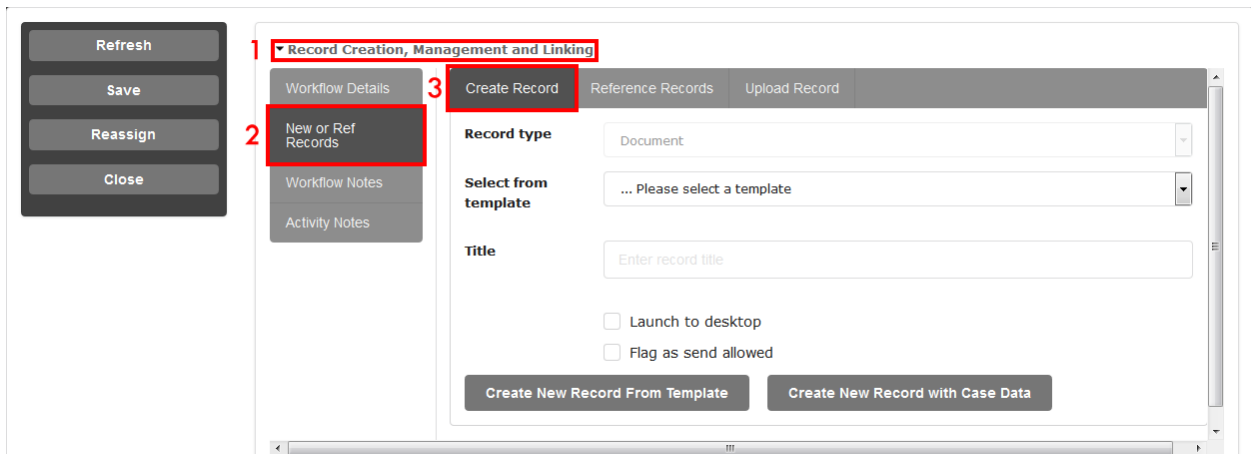
You still have two options for **UPLOADING DOCUMENTS** but the look and feel of how to access the second option has changed. To access the new uploader please see the instructions and screenshot below:

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.

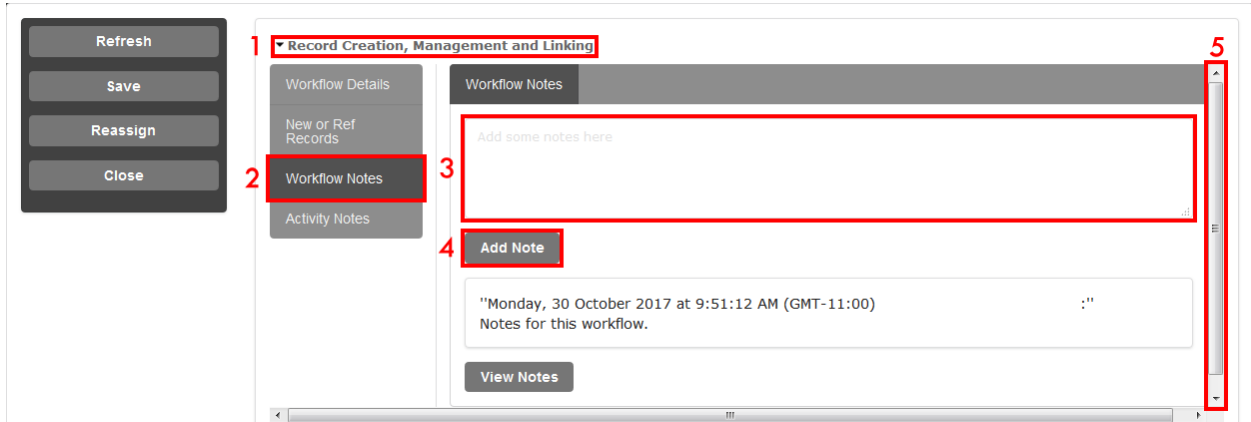


Follow the same procedure for uploading documents and generating templates with case data as in the previous version of the Portal.

Introducing the new Records Online Workflow Portal

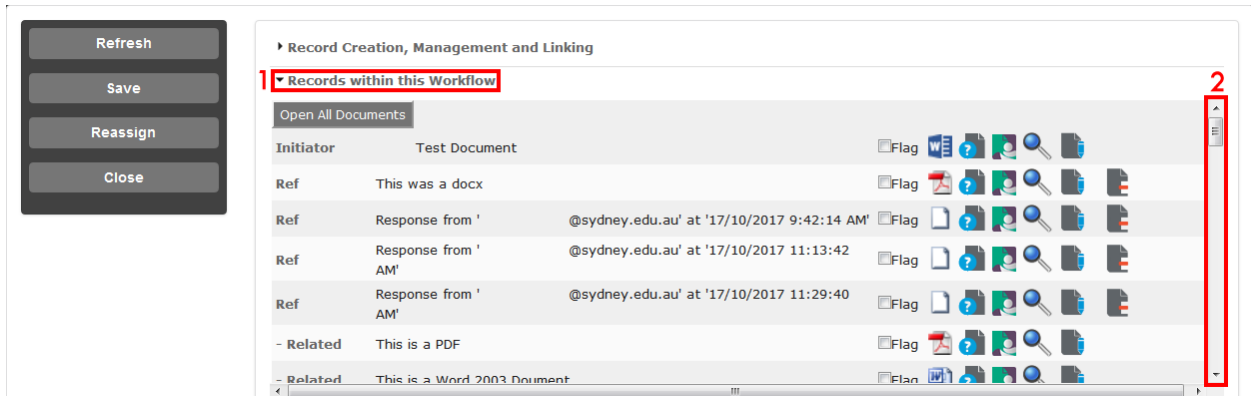
There are still two ways to add **WORKFLOW NOTES** but again the look and feel has changed. To add notes without completing the activity please refer to the instructions and screenshot below:

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
	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

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

Introducing the new Records Online Workflow Portal

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 ACITIVITY**. All other features have been retained but are now in a slightly different format.

Completion

ToDo Items	Notes
<input type="checkbox"/> EIC or NA approve the letter to student	I have received approval to send the letter from the relevant EIC/NA
<input type="checkbox"/> select(tick) documents to be sent	I have selected (ticked) the approved letter and other necessary documents for sending, do not tick documents that should not be sent to student

Future activity participants. Please select as required.

2B FYI No Action Required
- UOS Coordinator

Additional Development

Outcomes	Notes
<input type="radio"/> has completed all requirements	
<input type="radio"/> has not satisfactorily complied with the requirements	

Workflow Notes
"Monday, 30 October 2017 at 3:14:16 PM (GMT-11:00)"

This is another workflow note.

Special Instructions that may be included in automated email notifications.

Additional comments related to this workflow.

Complete Activity

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