

This work instruction was last updated: 09 March 2010

School/Department HR Access

This work instruction explains the new **Sch/Dept HR Access** task which is designed to replace the current **e-HR task** within Resourcelink. This will give access to more HR data contained within and allow consistency between the screens used by HR and the Schools/depts.

This work instruction also describes some of the changes that users will notice as part of the Aurora upgrade of ResourceLink

- ☛ ResourceLink **Aurora** should have been deployed to your pc. If it hasn't, please email [serviceline](#) to request it.

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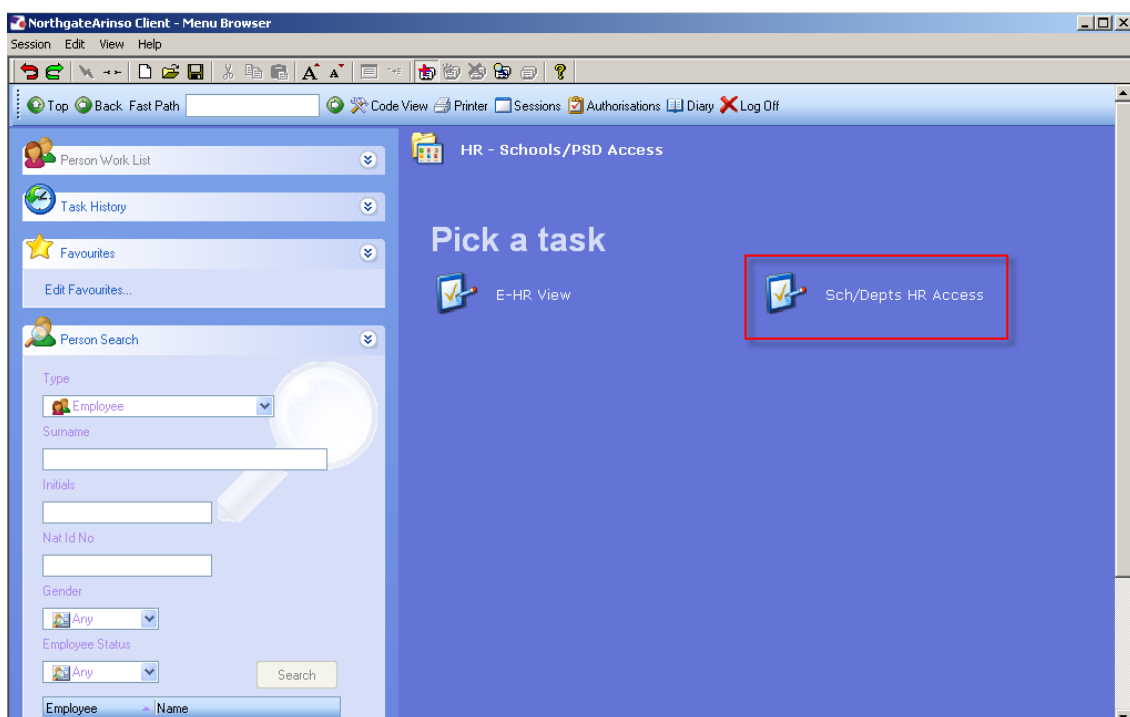
1 Getting started with Sch/Dept HR Access

1.1 Log in to ResourceLink Aurora



🔊 If the log on screen does not show **ResourceLink aurora** as the title then please email/phone ServiceLine and ask for this version to be deployed to your machine

1.2 Click on **Sch/Depts HR Access** task



1.3 This will bring up the 'Employee Selection Screen'.

Task - Sch/Depts HR Access - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee As at Date

Previous Surname

Known As


Add Search


Surname	Inits	Title	Emp Number	National ID Number	Start Date	Fore

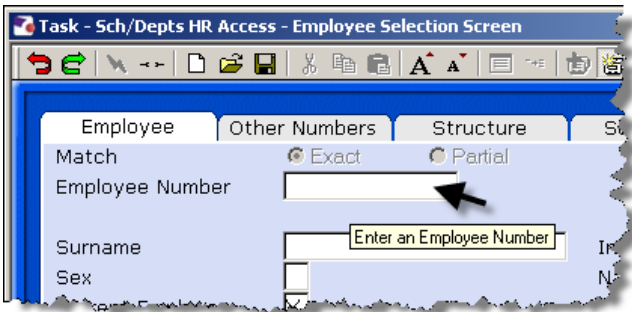
Select Exit Save List

Enter an Employee Number

 This **Employee Selection screen** is a new feature of ResourceLink Aurora

- 1.4  **Back** and **Forward** Buttons to navigate back and forth through your searches

- 1.5  Help text is displayed in the lower grey bar.

- 1.6  You can also obtain help text by hovering your pointer over the field in question.

2 Employee Selection Screen Search Fields

Task - Sch/Depts HR Access - Employee Selection Screen

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

1 Employee Number

2 Surname

3 Initials

4 Sex

5 Current Employee

6 Previous Surname

7 Known As

8 Nat. Ins. No.

9 As at Date

Add Search

Surname	Inits	Title	Emp Number	National ID Number	Start Date	Forename

Select Exit Save List

Enter an Employee Number

2.1 You may use one or numerous search criteria as follows:

- 1 **Employee Number** – If Known you can enter employee number
- 2 **Surname** – Enter full or partial surname (proceed with ! to invoke sounds like search)
- 3 **Initials** – Enter one or more initials (proceed with % to allow any position match)
- 4 **Sex** – Enter M or F (Male/Female)
- 5 **Current Employee** – Enter: 'Y' for current; 'N' for non-current; 'A' for any employee
- 6 **Previous Surname** - Enter full or partial previous surname (proceed with ! to invoke sounds like search)
- 7 **Known As** - Enter full or partial name (proceed with ! to invoke sounds like search)

8 **Nats. Ins. No.** – Enter the person's National Insurance Number

9 **As at date** – today's date is automatically completed

2.2 When you have entered your search criteria, click on **Search** and the bottom of the screen will display all matching results:

Search

Task - All Details - Employee Selection Screen

Session Edit View Help

Employee Other Numbers Structure Saved List Employment

Match ☒ Exact ☐ Partial

Employee Number

Surname Initials

Sex Nat. Ins. No.

Current Employee As at Date

Previous Surname

Known As

Add Search

Surname	Init	Title	Emp Number	National ID Number	Start Date	For
PITT	B	MR	2074273	Nat. Ins. No. TN120880M	01/02/2010	BR
PITT	BH	MR	2073455	Nat. Ins. No. TN120880M	01/01/2010	BR
PITT	BM	MR	1856561	Nat. Ins. No.	08/09/2008	BR
PITT	M	MR	2071541	Nat. Ins. No.	14/01/2010	MA
PITTOCK	C	MR	2055406	Nat. Ins. No.	01/10/2009	CH

Select Exit Save List

Select an Employee

2.3 Click on the employee you wish to view and click on **Select**

Select

2.4 Or re-enter new search criteria.

3 Using the Sch/Dept HR Access Task

- 3.1 Once you have searched and selected the employee you will be presented with the **Employee Personal Detail Screen**.

Navigating around the Task:



Save Button – not used in this profile gives view only access to data



Exit Button – to leave this record and return to the Employee Selection Screen



Previous or Next Screen in the task



Screens – to view available screens within the task

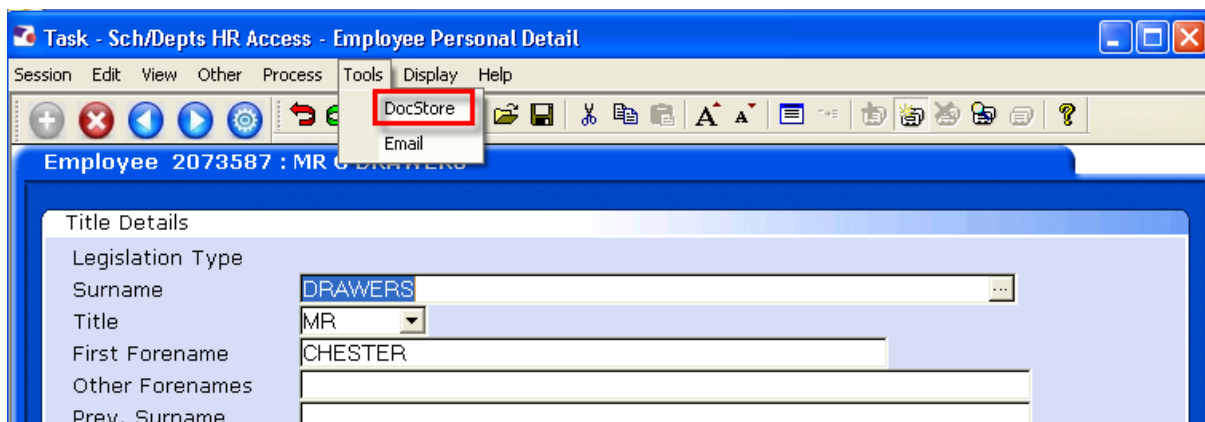
4 Available Screens

4.1 The following screens are available to Sch/Depts within the **Sch/Depts HR Access** task and appear in the following order:

- MD55S3 Personal Details
- MD55S4 Person Relationship Summary
- MD47S1 Employment Detail
- MD47S1B Employee Current Post Holding
- MD47S7 Employee Post Holding History
- MD47S23 Employee Post Holding Costing
- MD47S71 Employee Contract Details
- MD55S77 Individual Employment Check Details
- MD55S79 Employee Work Permits
- MD55S70 CRB Details
- MD82S1 Employee Absence Details
- MD82S5 Employee Holiday Entitlement
- MD55S78 Asset Management

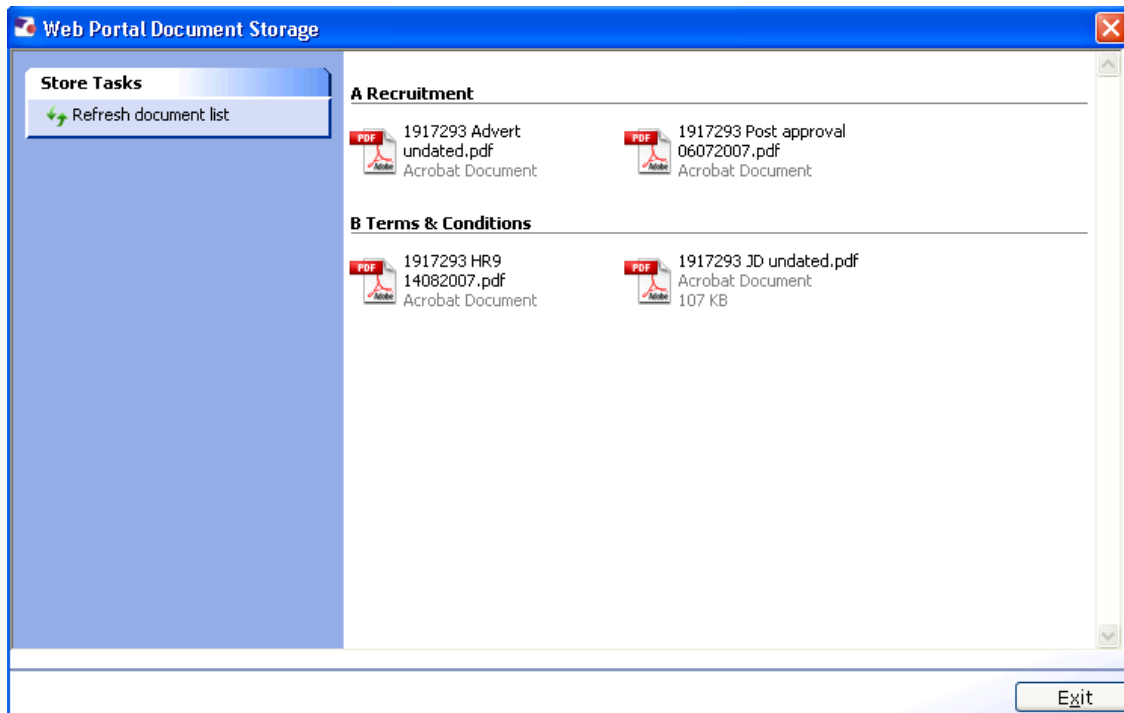
5 Accessing DocStore

5.1 Click on **Tools** and click on **DocStore**:

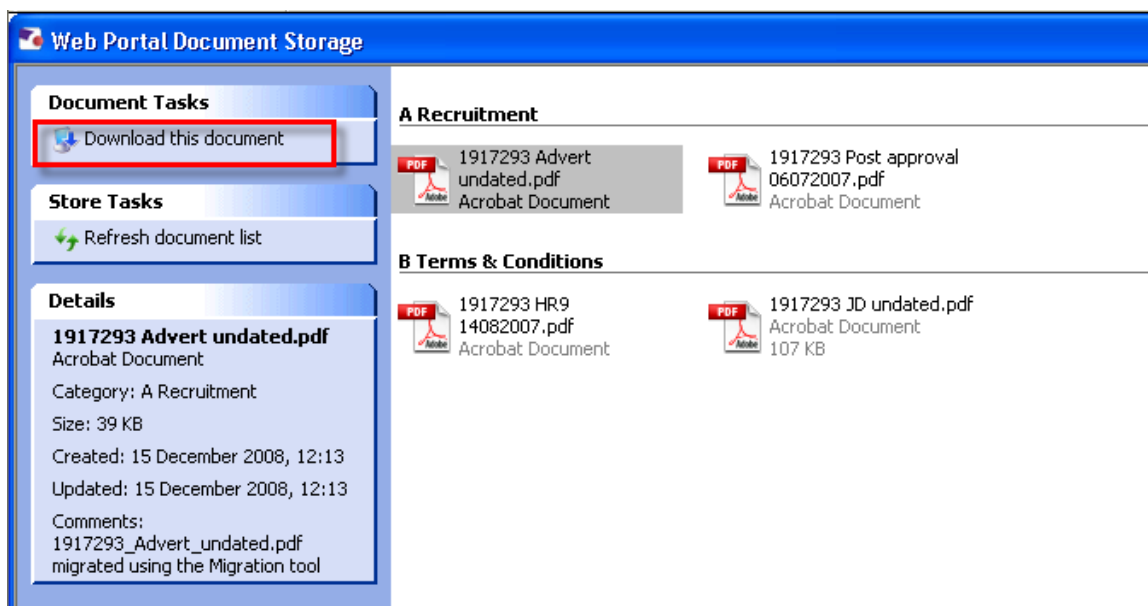


5.2 The screen will display documents for this employee on the following categories:

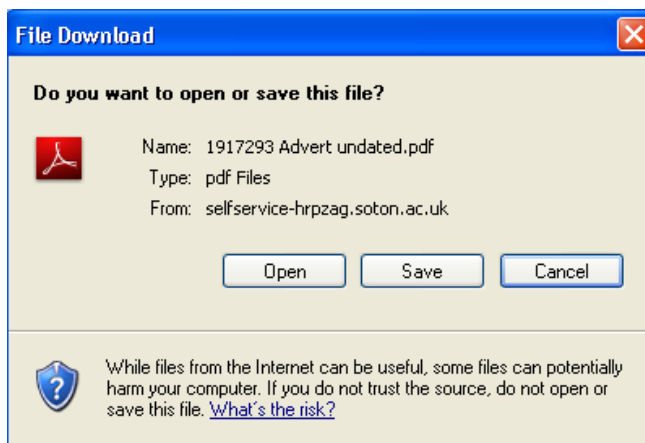
- Recruitment
- Terms & Conditions
- Termination



5.3 To view a document click on the document:



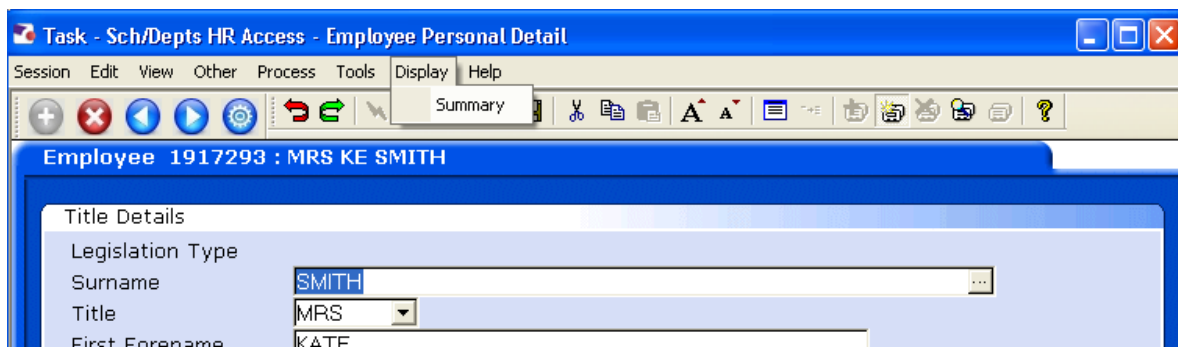
5.4 Then click on 'Download this document'



- 5.5 Click on **Open** and the document will open. Close the document down as you would any other document.

6 Text Summary

- 6.1 To view the **Employee Summary** and to locate that employee's position within the organisational structure, in the Toolbar, click on **Display**:



- 6.2 Click on **Summary**
- 6.3 A new window will open displaying some basic details on this employee:

CTBANEMP Employee Summary

General

Nat. Ins. No.	JW045872C	Length of Service:	
Orig. Start Date	05/11/2007	Employment	2 Years 4 Months 4 Days
End Date		Serv. Cond	2 Years 4 Months 4 Days
Gender	F	Pension	2 Years 4 Months 4 Days
Age	30 Years 3 Months 26 Days	Redundancy	2 Years 4 Months 4 Days
Date Of Birth	12/11/1979		
Main Post	CD01006413	Research and Prospect Manager	
Position Status	PS001	Full Time - Permanent	
State Retire Date	12/11/2047		
State Retire Age	68 Years 0 Months		

Payroll Summary
 Personnel Summary
 Post Hierarchy
 Exit

6.4 Click on **Post Hierarchy** to view where they sit within the organisational structure:

MD67G4 Hierarchy Selection

Seq	Hierarchy	Description	Structure
001	HR MAIN	HR Main Hierarchy	...
002	HRMAIN06	HR Hierarchy 01/11/2008 - 30/04/2009	
003	HRMAIN07	HR Hierarchy 01/05/2009 - 31/07/2009	
004	HRMAIN08	HR Hierarchy 01/08/2009 -	

Add
Select
Delete
Exit

6.5 Select the latest version of the hierarchy and window in on the Structure field:

004	HRMAIN08	HR Hierarchy 01/08/2009 -	...
-----	----------	---------------------------	-----

6.6 The screen will show you from the top of the hierarchy where this persons **main post** sits:

7 Personal Details screen

7.1 **Personal Detail Screen** – containing name, address, date of birth, marital status, addresses, telephone numbers etc.,

Task - Sch/Depts HR Access - Employee Personal Detail

Session Edit View Other Process Tools Display Help

Employee 2073587 : MR C DRAWERS

Title Details

Legislation Type

Surname

Title

First Forename

Other Forenames

Prev. Surname

Known As

Honours

Generation


Personal Details

Gender

Date of Birth Age: 29 Years 6 Months

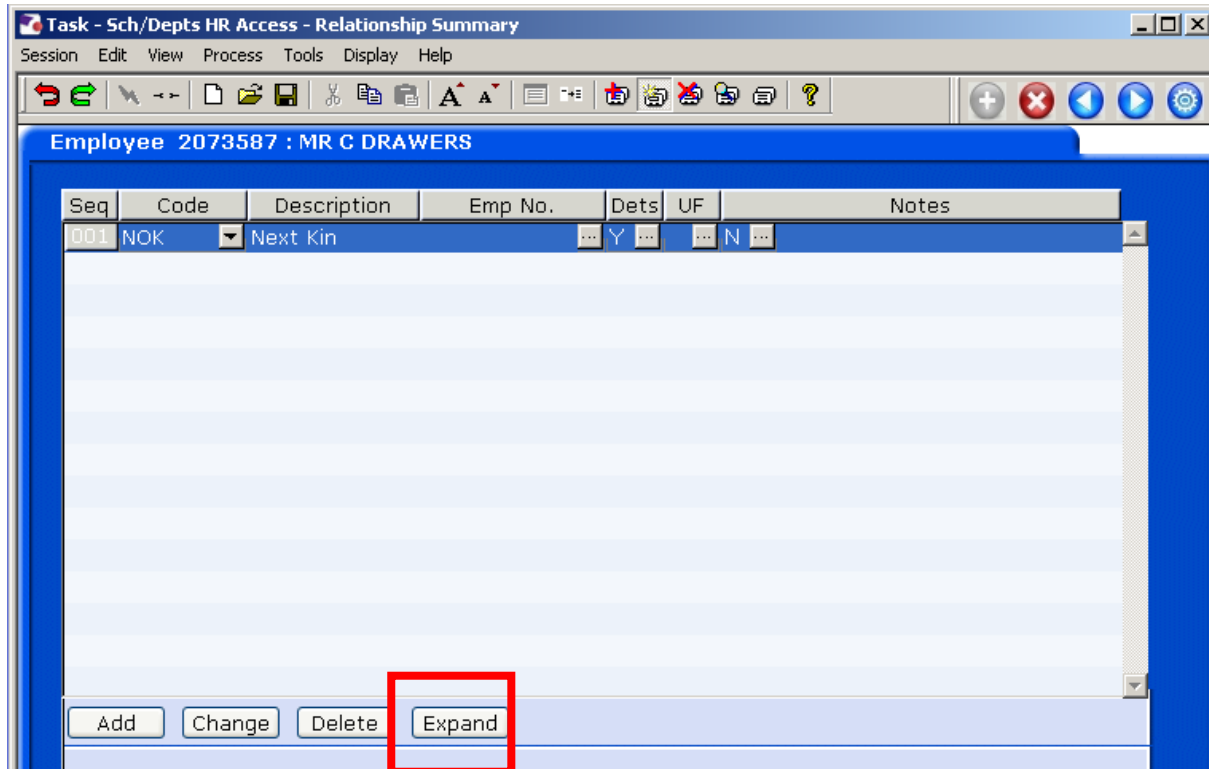
Nat. Ins. No. Case Number

Enter the person's Surname

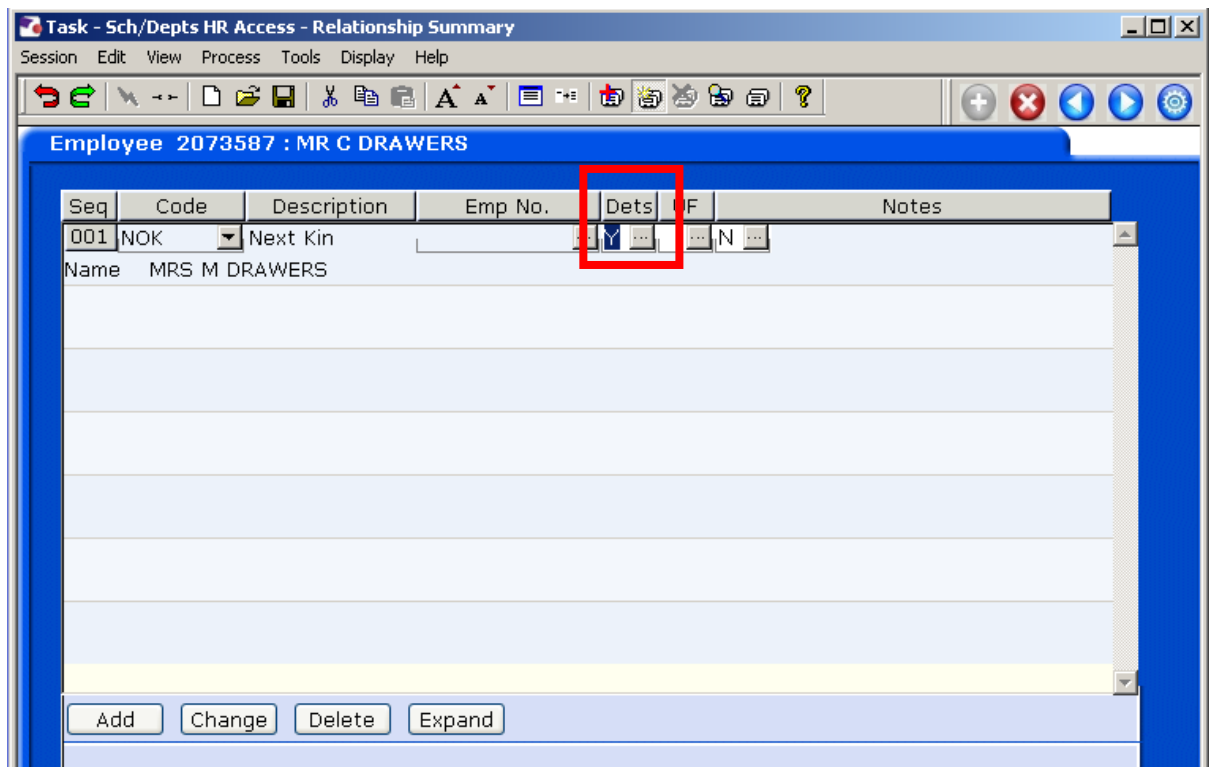
7.2 You can click on the buttons at the bottom of the screen to open a new window to view these details, where the folder sign is open, this means there is data contained within :

7.3 Relationship Summary Screen

7.4 Containing the next of kin and/or emergency contact.



7.5 Click on 'Expand' to see more details



- 7.6 Window in on **'Details'** to view further information on the next of kin or emergency contact. Click **'Exit'** to go back to the main screen.

The screenshot shows a software window titled "MD55L1 Person Detail". It contains two main sections: "Title Details" and "Personal Details".


Title Details:

Relation	Next Kin	Relation Detail
Surname	DRAWERS	
Title	MRS	
First Forename	MARY	
Other Forenames		
Previous Surname		
Known As		

Personal Details:

Gender	F
Date Of Birth	
Country of Birth	
Nationality/Citizenship	
Nat. Ins. No.	

At the bottom of the window, there are several buttons with folder icons: "Additional", "Address", "Telephone", "Notes", "Passport/Visa", and a red-bordered "Exit" button.

- 7.7 You can click on the buttons at the bottom of the screen to open a new window to view these details, where the folder sign is open, this means there is data contained within :

8 Employment Detail Screen

- 8.1 This screen provides information on original start date, current start date, length of service, notice period, no. of posts.

Task - Sch/Depts HR Access - Employment Detail

Session Edit View Other Process Tools Display Help

Employee 2073587 : MR C DRAWERS


Dates

Original Start	01/02/2010	SG001	New Appointment
Current Start	01/02/2010	SG001	New Appointment
Termination			
To Staff			
Probation			

Additional

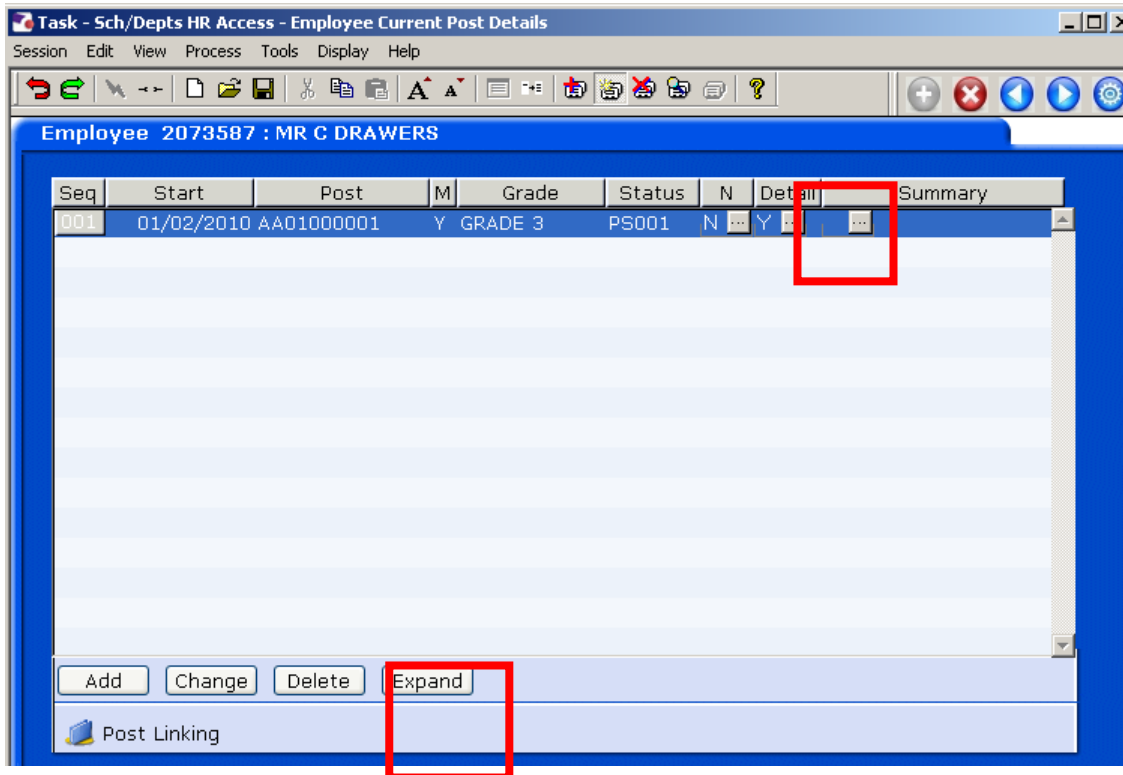
Service	1 Month 4 Days
Employee Type	
Self Service Unit	
Willing to Job Share	<input type="checkbox"/> TUPE <input checked="" type="checkbox"/> N
Notice Period	NP001 12 Weeks
No Of Current Posts	1

Service Breaks User Fields Notes Empl. History

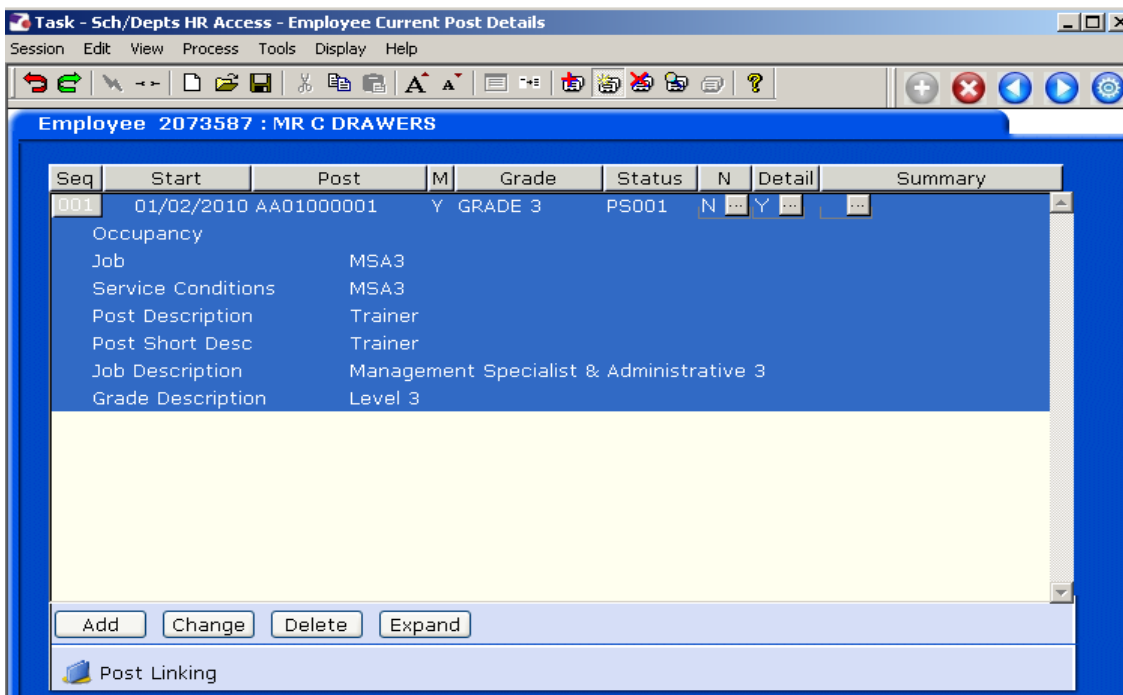
- 8.2 Click on '**Service Breaks**' to view any break in service.
- 8.3 You can click on the buttons at the bottom of the screen to open a new window to view these details, where the folder sign is open, this means there is data contained within :

9 Employee Current Post Details Screen

- 9.1 - will display all current posts the employee holds at the University. This will include Contracted posts, Temp bank posts, Visitor posts etc.



- 9.2 Click on the 'Expand' button to see a current overview of details



9.3 or window in on '**Detail**' to view more information:

Employee 2073587 : MR C DRAWERS									
Seq	Start	Post	M	Grade	Status	N	Detail	Summary	
001	01/02/2010	AA01000001	Y	GRADE 3	PS001	N	Y		

MD47L3 Employee Post Holding Details

Detail

Post AA01000001 Trainer
 Job MSA3 Management Specialist & Administrative 3
 Employee Grade
 Post Grade GRADE 3 Level 3

General Conditions Misc Grade Contract

Start 01/02/2010 SG001 New Appointment
 End

Service In Post 1 Month 8 Days
 Projected End 01/02/2012

Post Main Flag ☒ Suspended ☐
 Exc. from attracting Ee's Costs ☐

T/S Template Perf Management User Fields Notes
 Salary Planning Exit

9.4 **User Fields** will give details on Probation periods, Homeworking details, Temp Bank & Visitor contact details :

T/S Template Perf Management User Fields Notes
 Salary Planning Exit

MD00G32 Simple User Defined Field Data

Field Label	Field Contents	Description
Probation End Date	01/02/2011	
Prob Confirmation		
Prob Ext. Date 1		
Prob Ext. Date 2		
NHS Honorary C'tract		
Sch/Dept Contact		

Probation End Date 01/02/2011

Exit

Field Label	Field Contents	Description
Contact Extension No		
Authorised Signatory		
Job Details		
Location		
Visitor Title		
HMS Reference Number		

Field Label	Field Contents	Description
Converted from Post		
Homeworking App Date		
Homeworking App Suc?		
Homeworking Rej Reas		
Hours Per Week		
Homework Start Date		

Field Label	Field Contents	Description
Homework Trial End D		
Homework End Date		
Private Medical Care		

9.5 The **General** tab will show **Post Start Date & Reason** and **main post** flag:

General		Conditions	Misc	Grade	Contract
Start	01/02/2010	SG001	New Appointment		
End					
Service In Post	1 Month 8 Days				
Projected End	01/02/2012				
Post Main Flag	<input checked="" type="checkbox"/>	Suspended	<input type="checkbox"/>		
Exc. from attracting Ee's Costs	<input type="checkbox"/>				

9.6 The **Conditions** Tab provides details on **Service Condition, Position Status, Occupancy, Work Pattern and Contracted Hours**. You can window in to each category to see further details and a history of changes as pictured below:

MD47L3 Employee Post Holding Details

Detail					
Post	AA01000001	Trainer			
Job	MSA3	Management Specialist & Administrative 3			
Employee Grade					
Post Grade	GRADE 3	Level 3			

General		Conditions	Misc	Grade	Contract
Service Cond ID	MSA3	Management Specialist & Administrative 3			
Source	EMPPOST				
Position Status	PS001	Full Time - Permanent			
Occupancy					
Wk Pattern	35MTWTF	S0M7T7W7T7F7S0			
Source	EMPPOST				
Contract Hours	35.00	Weekly Hours	35.00	00.0000	
Source	CONTRACT	FTE	1.0000		

T/S Template
 Salary Planning
 Perf Management
 User Fields
 Notes
 Exit

9.7 Service Conditions:

MD55G27 Employee Service Conditions

General

Post AA01000001 Trainer
From 01/02/2010 To

Seq	Start Date	End Date	Service Condition	Description	Notes
001	01/02/2010		MSA3	MSA3	N

Add Change Delete Expand

Exit

9.8 Position Status:

MD55G30 Employee Position Status

General

Post AA01000001 Trainer
From 01/02/2010 To

Seq	Start Date	End Date	Position Status	Description	Notes
001	01/02/2010		PS001	FTP	N

Add Change Delete Expand

Exit

9.9 Work Pattern:

MD47L3 Employee Post Holding Details

Detail

Post AA01000001 Trainer

MD47L2 Employee Work Patterns

General

Post AA01000001 Trainer

From 01/02/2010 To

Seq	Start Date	End Date	Work Pattern	Description	S	Start Day	Reason
001	01/02/2010		35MTWTF	35MTWTF	N	2	SG001

Add Change Delete Expand

Exit

9.10 Contract Hours, FTE Hours and Weeks Per Year (if less than 52.143)

MD47L3 Employee Post Holding Details

Detail

Post AA01000001 Trainer

MD47G1 Employee Contract Hours

General

Post AA01000001 Trainer

From 01/02/2010 To

Seq	Start Date	End Date	Contract Hours	Wks Per Year	FTE Hours	Hrs Per Year
001	01/02/2010		35.00		35.00	

Add Change Delete

Exit


9.11 Misc Tab displays the location of the post

The screenshot shows the 'MD47L3 Employee Post Holding Details' window. The 'Detail' section at the top lists: Post AA01000001 (Trainer), Job MSA3 (Management Specialist & Administrative 3), Employee Grade, and Post Grade GRADE 3 (Level 3). Below this are tabs for General, Conditions, Misc, Grade, and Contract. The 'Misc' tab is highlighted with a red box. It contains a 'Location' section with a dropdown menu set to 'HIGHFIELD' (Highfield Campus, Southampton) and a 'Source' field set to 'EMPPOST'. Below this is an 'Average Pay' section with input fields for 'Average Pay', 'Average Hours', and a checkbox for 'Auto Recalc AvP'.

9.12 Grade Tab holds current and historic grade details. Window in to the Pay Grade field to see further details and a full history of changes as shown below:

The screenshot shows the 'MD47L3 Employee Post Holding Details' window with the 'Grade' tab selected (highlighted with a red box). The 'Detail' section is the same as in the previous screenshot. The 'Grade' tab contains a 'Pay Grade' dropdown menu set to 'GRADE 3' (Level 3) and a 'Source' field set to 'EMPPOST'. Below this is a section containing a table of grade details, which is also highlighted with a red box:

Start Date	01/02/2010
End Date	
Point	22
Point Amount	23566.00
Point Rate	12.9129

 The Point, Point Amount and Rate displayed on the screen above are based on the employees current grade & contract hrs

MD47G41 Employee **Spinal Grade History**

General

Post AA01000001 Trainer
From 01/02/2010 T.

Seq	Start Date	End Date	Grade	Change Reason	Source	Grade Source	Point	N
001	01/02/2010		GRADE 3	SG001	POSTPL	POSTGD	22	N
Point Rate		12.9129	Enh.Rate	Point Amount		23566.00		
Override Date			Override Reason					
Override Step			Carry Forward					
Bar Point			Current Bar Point		26			

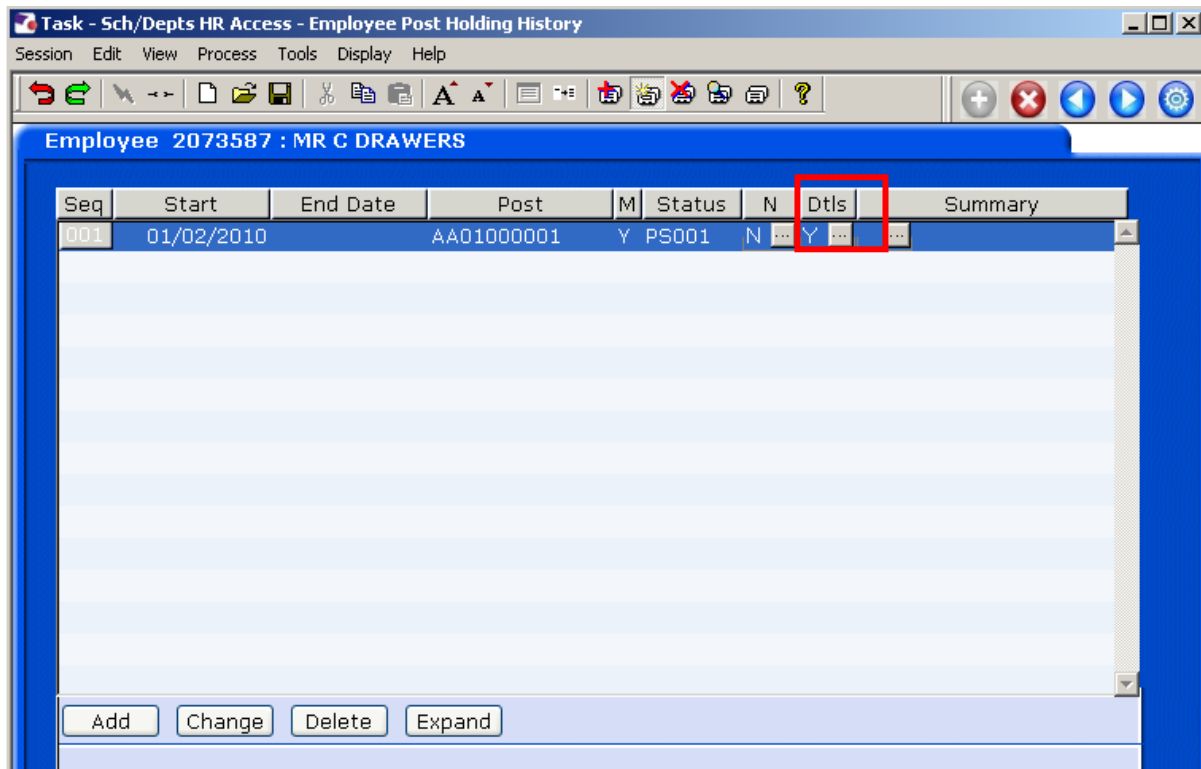
Add Change Delete Expand

Exit

- 9.13 The **Override Date** will show when the employee is due their next annual increment (if blank and they have not reached the bar point for their grade the next increment will be received on 1st August)

10 Employee Post Holding History Screen

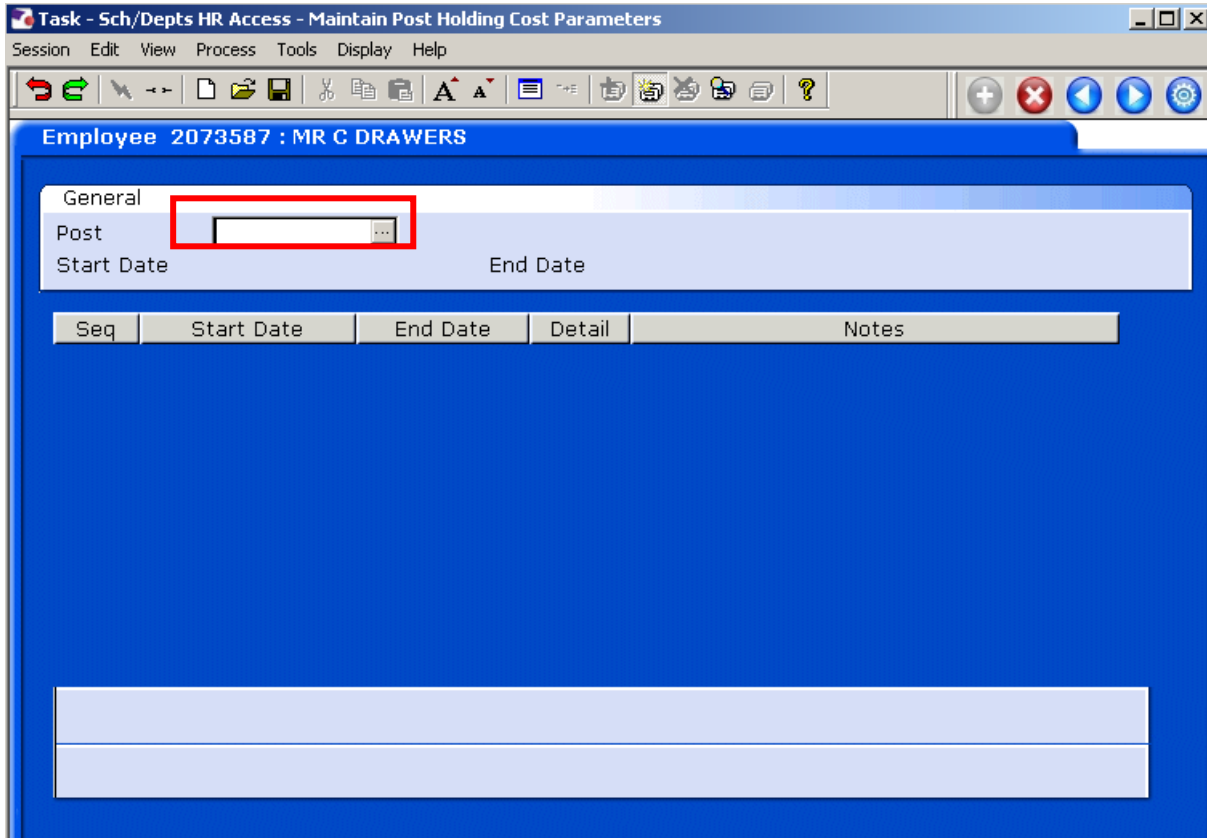
- 10.1 This screen lists all posts held, current or past. Window in on **DtIs** (Details) to view specifics about the post interested in.



- ❗ This screen works in the same way as the previous **Current post holding** screen but will show all current, future and historical posts

11 Employee Post Holding Cost Parameters

11.1 To view the SPC (Sub Project Code) for each post, window in on the **Post** field:



Task - Sch/Depts HR Access - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

General

Post

Start Date End Date

Seq	Start Date	End Date	Detail	Notes

11.2 Select the current post (the one with no end date)

MD48G17 Employee's Post Selection

Seq	Post	Short Desc	Start Date	End Date	Type	Main Flag
001	AA01000001	Trainer	01/02/2010			Y

Add Select Delete

Exit

11.3 Window into 'Detail'

Task - Sch/Depts HR Access - Maintain Post Holding Cost Parameters

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

General

Post AA01000001 Trainer

Start Date 01/02/2010 End Date

Seq	Start Date	End Date	Detail	Notes
001	01/02/2010		Y ... N ...	

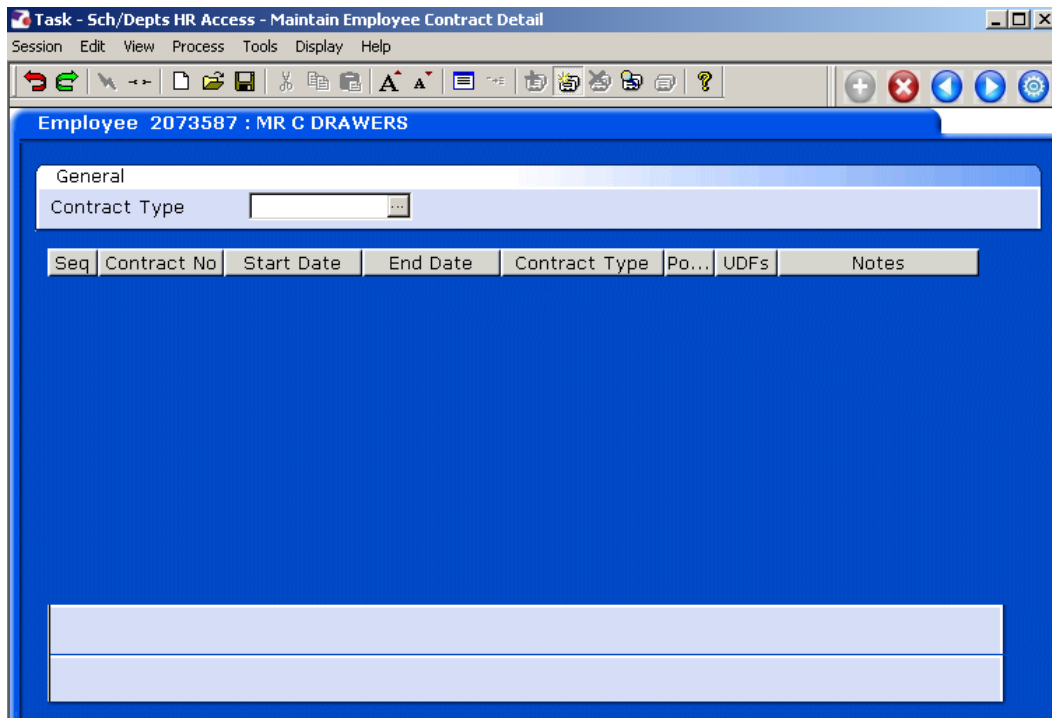
Add Change Delete

11.4 The SPC and %'s are displayed.

HR/I/300/1.0

12 Maintain Employee Contract Detail

- 12.1 If on a fixed term contract, the employee's contract details will be listed here and you will be able to see how many extensions they have had to their fixed term contract.



Task - Sch/Depts HR Access - Maintain Employee Contract Detail

Session Edit View Process Tools Display Help

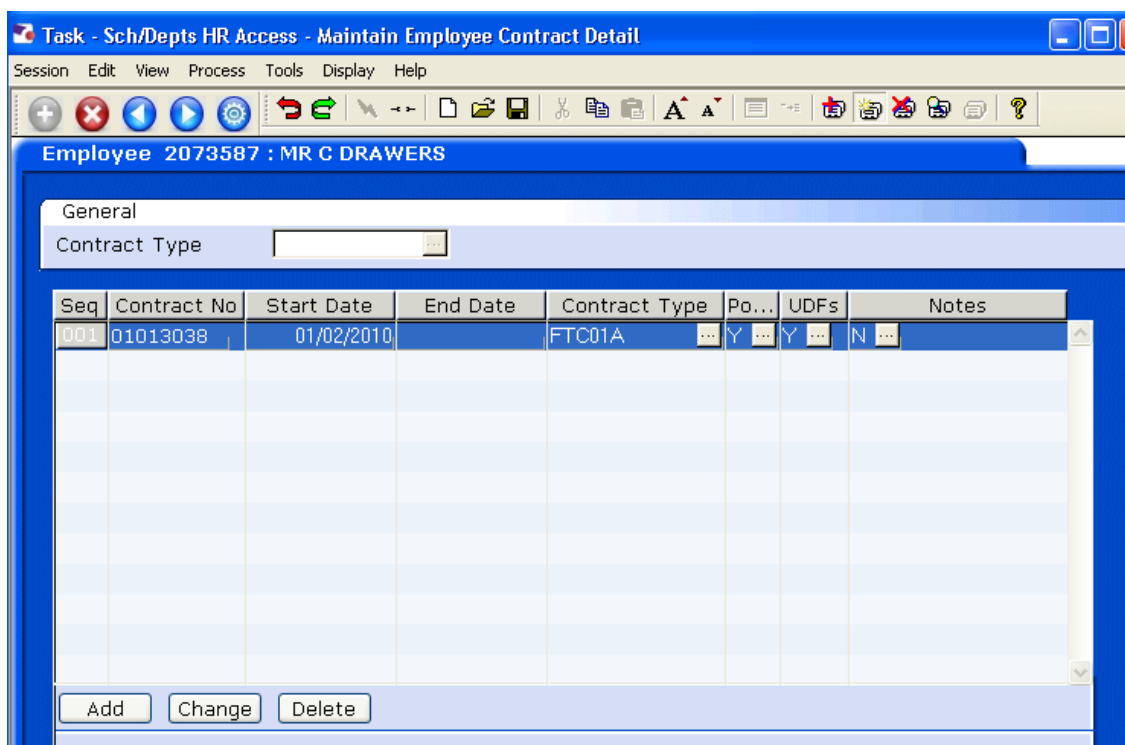
Employee 2073587 : MR C DRAWERS

General

Contract Type

Seq	Contract No	Start Date	End Date	Contract Type	Po...	UDFs	Notes
-----	-------------	------------	----------	---------------	-------	------	-------

- 12.2 Enter past the **Contract Type** field to display all extensions:



Task - Sch/Depts HR Access - Maintain Employee Contract Detail

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

General

Contract Type

Seq	Contract No	Start Date	End Date	Contract Type	Po...	UDFs	Notes
001	01013038	01/02/2010		FTC01A	Y	Y	N

Add Change Delete

13 Individual Employment Checks

13.1 This screen will list CRB, ISA (Independent Safeguarding Authority) & 12 month right to work in the UK checks:

Task - Sch/Depts HR Access - Individual employment checks

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

Selection
Start Date: 02/02/2010 Search

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	02/02/2010	CRB	E	09/02/2010	<input type="checkbox"/>		N
002	01/02/2010	ISA	CONACT	01/02/2010	<input checked="" type="checkbox"/>	CONACT	N

Add Change Delete Expand

13.2 To view more details click on a row and click on **Expand**:

Task - Sch/Depts HR Access - Individual employment checks

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

Selection
Start Date: 02/02/2010 Search

Seq	Start Date	Type	Level	Clearance	Reg	Status	N
001	02/02/2010	CRB	E	09/02/2010	<input type="checkbox"/>		N

Renewal Date: 09/02/2013

Authorised by: [dropdown]

Reference numbers: 123456789

Registration body: CRB CRB Type

Add Change Delete Expand

14 Employee Work Permits

14.1 This screen will detail any work permit or visas required for the employee together with expiration dates and the type of permit they hold.

Seq	Area	Proof of ID	Registered	WP Valid From	WP Valid To	Extended To
001	OTH	12/01/2009		11/12/2008	31/01/2013	
			Work Permit / Visa No. SV005914878			
			Home office letter issued N			
			Indefinite leave to remain N Date Obtained			
			Migrant Worker Points N			
002	OTH	04/09/2006		24/08/2006	28/02/2008	26/02/2009
			Work Permit / Visa No. LTR UK1472008			
			Home office letter issued Y			
			Indefinite leave to remain N Date Obtained			
			Migrant Worker Points N			

① Work Permit/Visa No's are prefixed with the following alpha characters

- An employee with a Work Permit (**WP**)
- An employee who has a work permit through their partner/spouse (Work Permit Dependant - **WPD**)
- An employee with a Visa (**V**) or Student Visa (**SV**) – this could be through a number of routes.
- An employee who had Indefinite Leave to Remain (**ILTR**)
- An employee who is classed as a Highly Skilled Migrant Worker (**HSMW**)
- An employee with either the Workers' Registration Scheme or Accession State Worker Registration Scheme (**WR**)
- International Graduates (**IG**)

15 CRB Screen

- 15.1 Any posts which require CRB will have this screen completed to provide all the necessary information required along with expiration dates:

Task - Sch/Depts HR Access - CRB Screen

Session Edit View Process Tools Display Help

Employee 2073587 : MR C DRAWERS

General

Disclosure App No.	123456789	Barcode No	0000000000000000
Category	E	List99 Check	
Date Sent to Person	01/02/2010	Completed Form Rec'd	02/02/2010
Returned to amend			
Identity Checked by			
Counter Signatory	1834657	MISS S BARNES	
Date Sent to CRB	02/02/2010	Re-sent to CRB	
Disclosure Cert. Rec.	10/02/2010	Certificate No.	123456789
Disc. Cert. Issue	09/02/2010	No of days taken to process	9
Line Mgr Notified		Renewal Date	09/02/2013
Cost		Cost Code	

Portability Notes

16 Employee Absence Details Screen

- 16.1 This enables a quick view of all the absence from work. Including everything from Annual Leave, Sickness and Un/Authorised absence.
- 16.2 Select a row and window into **Det** (Details) for view further information on that line of absence data:

Employee 2073587 : MR C DRAWERS

Seq	Start Date	Time	End Date	Time	Absence Type	UF	N	Det
001	09/03/2010	09:00	10/03/2010	17:00	H	N	N	
002	08/03/2010	09:00	08/03/2010	17:00	U	N	N	
003	05/03/2010	09:00	05/03/2010	17:00	P	N	N	
004	02/03/2010	09:00	02/03/2010	17:00	S	N	N	Y

Add Change Delete Expand

- 16.3 H = Holiday, P = Authorised Absence, S = Sickness & U = Unauthorised Absence

- 16.4 Sickness:

MD52S1 Sickness Detail

General

Start Date 02/03/2010 End Date 02/03/2010 Days 1

Absence Reason

Sickness Type **SICK** Sickness

Reason **SCK04** Infections including Colds and Flu

Reason Detail

Cause

Interview Date

Absence Detail

Certification **SELF** Self Certified

Expiry Date Due Date

Hurt At Work

Status

Entry Status Complete

16.5 Holiday:

MD82L7 Work Pattern Override Window

General

Holiday Type Annual Leave

Seq	Day	Date	Working Day	Hours
001	THU	04/03/2010	<input checked="" type="checkbox"/>	07:00

Add Change Delete

Exit

CTMESS4 Dialogue Box

General

Number of days taken: 1.0

Exit

18 Employee Assets Management

- 18.1 This screen will keep a record of any assets the employee may hold which are the property of the University, a laptop for example:

Task - Sch/Depts HR Access - Employee Assets Management

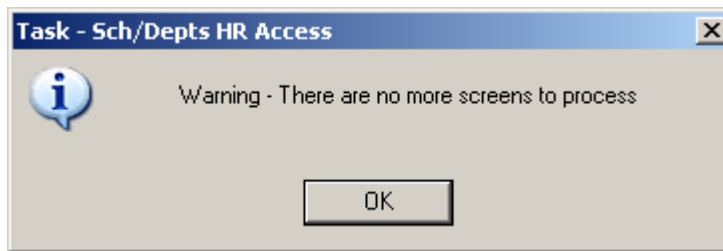
Session Edit View Other Process Tools Display Help

Employee 2073587 : MR C DRAWERS

Seq	Type	Requested	Asset Number	Alloc Date	Notes
001	MOB-A	23/02/2010		23/02/2010	...

Add Change Delete Expand

19 End of Screens



20 Logging off ResourceLink aurora

20.1 Always use the **Log Off** button when closing down ResourceLink Aurora to disconnect properly from ResourceLink:



20.2 When you have logged off, you will return to the ResourceLink log in screen, click on **Off**.

