

## Online Forms & Automatic Workflow

Adele Ezzy  
Manager, Online & Business Development

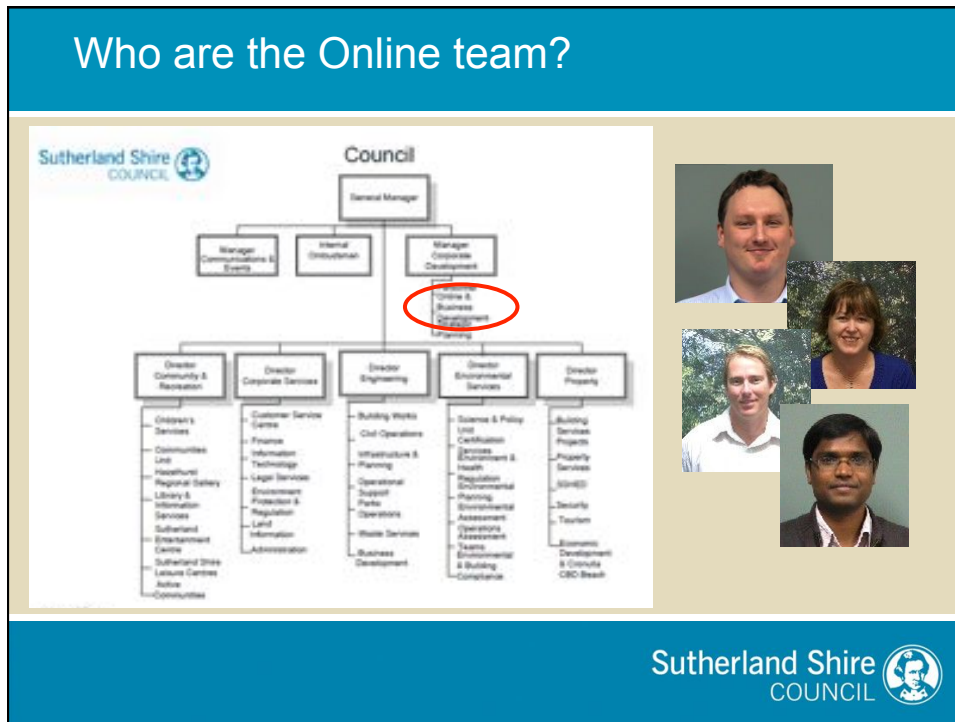
## Where we are...



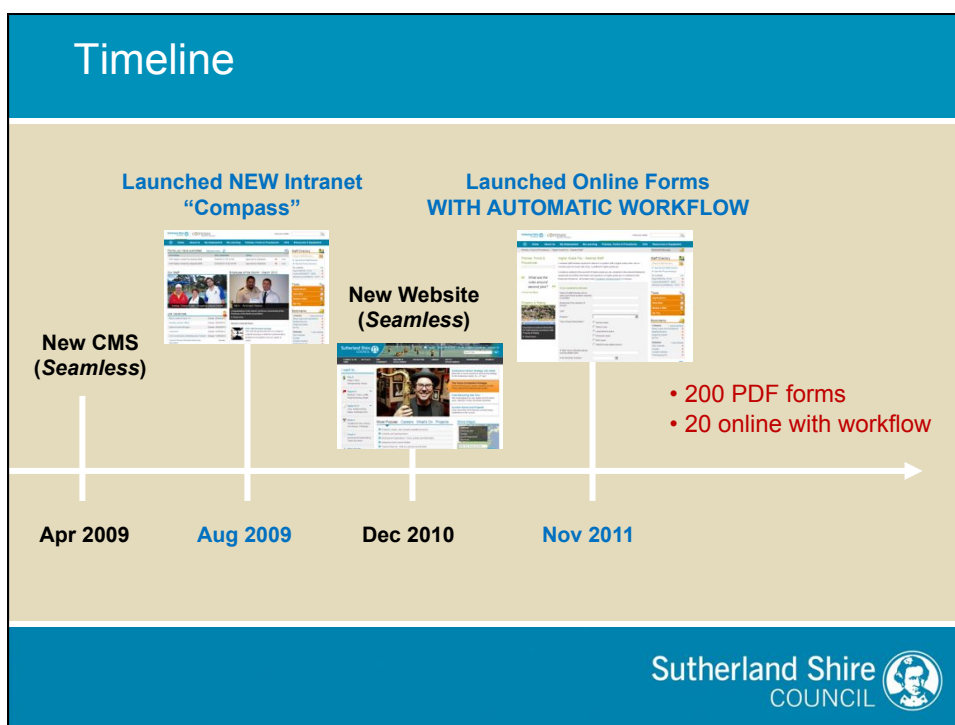
### Sutherland Shire

- **1,934 staff**
- **1,472 indoor**  
(admin, childcare, libraries etc)
- **462 outdoor**  
(waste, beaches etc)

## Who are the Online team?




## Timeline



## “Compass”

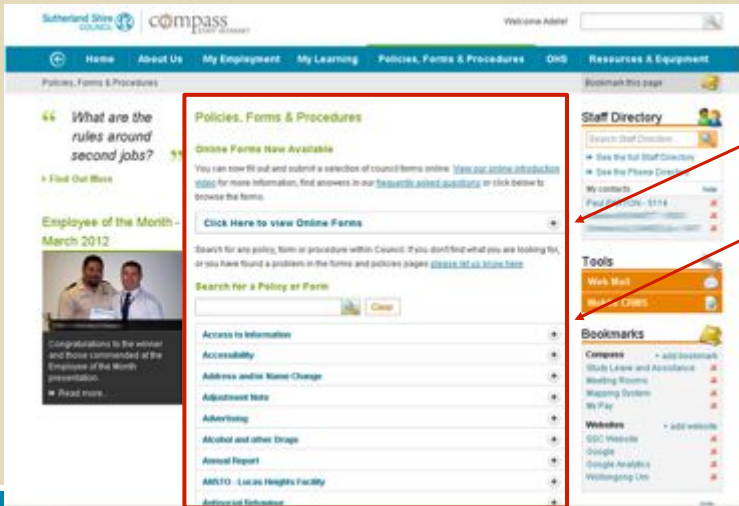
Automatic on login



Where staff launch all applications, email from home, mobile CRMS and most importantly their PAY!

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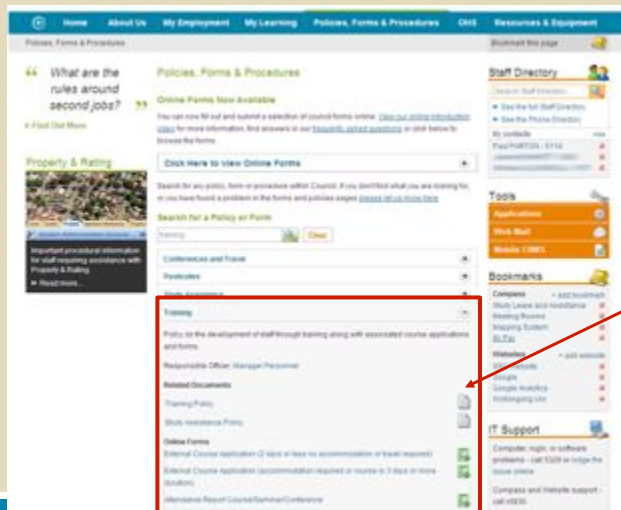
## Where do staff find the forms?



- “Online Forms” have quick access
- All subject based
- IT, HR etc forms

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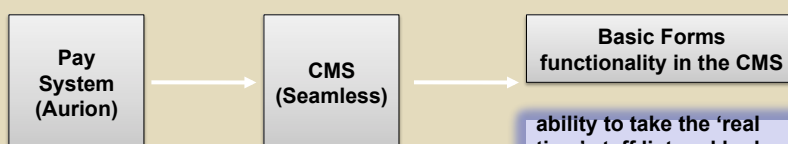
## Where do staff find the forms?



- Still offering PDF and Online form on most of the forms, until the outdoor staff are completely competent on Compass

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## The way we did it...



then developed...

- ability to take the 'real time' staff list and look at:
- who people report to
- who their manager/director is
- know if someone is 'acting'
- know if someone is on leave
- comments during workflow
- where the form is up to

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## The process...

**Higher Grade Pay - Salared Staff**

A salaried staff member requires review in a position with a higher salary level, who is normally paid at a lower rate of pay, or holds a higher grade job.

Conditions relating to the payment of higher grade pay are contained in the relevant Enterprise Agreement and further information and guidance on higher grade pay is contained in the Sutherland Shire Council - HR Manual under Conditions of Employment in Compass.

**To be completed by Manager**

Name of staff member who is paid at a lower salary level: \_\_\_\_\_

Employee's Pay Number (if known): \_\_\_\_\_

Type of leave being taken: ☐ Annual Leave ☐ Sick Leave ☐ Long Service Leave ☐ Personal Leave ☐ Other Leave ☐ Other (Please specify below): \_\_\_\_\_

If staff have submitted a previous request, please attach here: \_\_\_\_\_

From description of leave: ☐ Yes ☐ No

To describe of leave: ☐ Yes ☐ No

Manager to confirm that employee has received the leave in full: ☐ Yes ☐ No

**Details of employee who will be carrying out the duties and responsibilities of the position**

Surname: \_\_\_\_\_

Given Name: \_\_\_\_\_

Employee's Pay Number (if known): \_\_\_\_\_

Classification (optional - first determination made by Personnel): \_\_\_\_\_

Any further information or comments you would like to add can be provided here: \_\_\_\_\_

**Submit**

• Once submitted, looks at who submitted the form and identifies who they report to.

• Each form has different workflow and destination:

eg, Supervisor → Manager → Director → GM → HR.

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## The process...

**Forms you have submitted**

Form Name	Date Submitted	Status	View
WAP-Higher Grade Pay Salared Staff	05/04/2012 1:20:54 PM	Approved by shireboard	View
WAP-Higher Grade Pay Salared Staff	23/04/2012 10:23:30 PM	Waiting for an approval from shireboard	View

**Our Staff**

**Employee of the Month - March 2012**

**Job Vacancies**

Role	Closes
New Loader Drivers (x2)	28/04/2012
Building Assets Officer	30/04/2012
Natural Areas Manager	30/04/2012
Labourers	01/05/2012
Civil Construction & Maintenance Trades	11/05/2012

**Recent Corporate News**

**FOO - Self Directed Learning**

This year the group will work on a range of projects focusing on internal communication, feedback & recognition and our values &...

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## The process...

**Sutherland Shire COUNCIL compass**

Home About Us My Employment My Learning Policies, Forms & Procedures CMS Resources & Equipment

**Forms waiting for your approval**

Form Name	Applied By	Submitted Date	Approve	View
SNAP-ONSD Conf Seminar 2 Days or Less	Paul PARTON	26/04/2012 4:40:09 PM		

**Forms you have submitted**

Form Name	Date Submitted	Status
SNAP-Higher Grade Pay Salaried Staff	26/04/2012 1:35:14 PM	Approved by paulparton
SNAP-Higher Grade Pay Salaried Staff	23/04/2012 19:23:30 PM	Approved by paulparton

**Our Staff**  
Luke Turner - Lifeguard

**Property & Rating**  
System Administration Console

**Job Vacancies**  
Building Assets Officer

**Tools**  
Applications, Web Mail, Mobile CMS, My Pay

**Bookmarks**  
Compass, Study Leave and Assistance, Meeting Rooms, Booking System, My Pay, Websites

**Sutherland Shire COUNCIL**

## The process...

**Sutherland Shire COUNCIL compass**

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**Approve or Reject the Form**

Form Name:	SNAP-ONSD Conf Seminar 2 Days or Less
Submitted by:	Paul PARTON
Submission Date:	26/04/2012 4:40:09 PM
Form Details:	<p>Surname: Parton            Given Names: Paul            Position: Senior Online Administrator            Phone: 9710 5114            Mobile Number: 0400000000            Division: Executive            Title of Conference / Seminar: Internship 2012            Name of organization conducting the conference / seminar: Snap 2 Design            Date from: 15/05/2012            Date to: 16/05/2012            Details of conference / seminar documents please attach: <a href="#">register@surfshire.nsw.gov.au</a>            Location (eg Sydney): Sydney            Email: <a href="#">paulparton@surfshire.nsw.gov.au</a>            Do you have any special dietary requirements? No            If you have dietary restrictions please advise here:            How will the Conference / Seminar</p>

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## Challenges

- Used real forms in testing right up to GM level.
- Organisational structure not uniform
  - Most reporting steps are staff – supervisor – manager – director – GM.
  - Senior Manager at Director level
  - Group Manager (with managers reporting to her) who reports to a Director
- A pay system that won't import very easily.
- Outdoor staff do not have work email.

## Who creates the form?

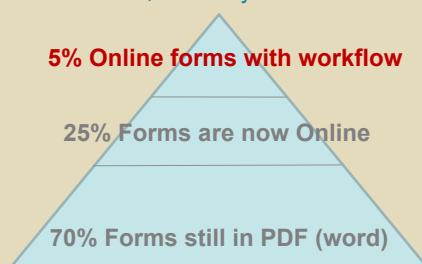
At this stage just the Online team

- Keep consistency
- To review each form and question each field to see if it's still necessary
  - Do we still need the form?
  - Can it be simplified?



## What's next?

- Move more forms online, currently ...



- Working on ability to stop, save and edit later
  - OHS forms on mobile devices, start out on the field, edited back at the office
  - Job application forms – external and internal applicants.

## Thank you

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