MyAurion

Navigation Guide
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1. Introduction

Welcome to the MyAurion Navigation guide.

This guide provides you with information on how to access and navigate through MyAurion and use the various features provided.
2. Common Terms

2.1 Terms

The following terms are used throughout this document and MyAurion.

<table>
<thead>
<tr>
<th>Term</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grid</td>
<td>A section, within a panel, that expands to display information in a list.</td>
</tr>
<tr>
<td>List</td>
<td>A table, within a grid, that displays lines of information under column headings. A list displays under an opened grid or on a Select pop-up window when using the Field Search function.</td>
</tr>
<tr>
<td>Panel</td>
<td>A panel is a frame within a portal. Most MyAurion portals are divided into two panels:&lt;br&gt;• The summary (left-hand) panel provides access to summary information via a series of grids&lt;br&gt;• The detail (right-hand) panel provides access to maintain records or submit requests.</td>
</tr>
<tr>
<td>Portal</td>
<td>A page that provides access to the main functions associated with an item selected from the menu bar. A portal is divided into two panels.</td>
</tr>
</tbody>
</table>
3. MyAurion Page Elements

The MyAurion page is the first page that is displayed when you log on to MyAurion. This page is composed of different elements, as shown in the below image.

The following sections provide information on each of the elements that have been identified above.

3.1 Page Header

The Page Header is displayed at the top of all MyAurion portals. The Page Header contains the MyAurion Sheet tabs and the Courtesy bar.

Depending on your role, the Page Header provides access to one or more Sheet tabs.

An example of the Page Header is provided below.

3.2 Courtesy Bar

The Courtesy bar is displayed on the right-hand side of the Page Header. TheCourtesy bar provides details of your current user session and access to the following drop-down menus:

- Favourites – Use this menu to add frequently visited portals to your list of favourites
- Settings – Use this menu to restore all grids to their default settings
- Help – Use this menu to access Aurion online help or view the ‘about’ Aurion information.
The Courtesy bar also provides access to the Logout link, which is used to exit MyAurion. An example of the Courtesy bar is provided below.

![Courtesy bar](image)

### 3.3 Sheet Tabs

The Sheet tabs are displayed in the bottom left-hand corner of the Page Header. Sheet tabs provide access to the key processing areas in MyAurion. An example of the Sheet tabs is provided below.

![Sheet tabs](image)

**Note:** Only supervisors have access to the MyStaff sheet tab.

### 3.4 Menu Bar

The Menu bar is displayed below the Sheet tabs. The Menu bar contains a series of menu buttons and each menu button provides access to a portal. The menu buttons are specific to the Sheet tab selected.

**Note:** Your employment type (continuing/fixed-term or casual) will determine the menu buttons that are available to you.

An example of the Menu bar is provided below.

![Menu bar](image)
The example above is of the Menu bar displayed when the MyAurion sheet tab is selected. This Menu bar provides access to the following portals:

- Home
- Personal Details
- Job
- Leave (This portal is only active if you are a continuing or fixed-term employee)
- Pay & Banking
- TimeKeeper (This portal is only active if you are a casual employee)
- Training.

The Menu bar on the MyStaff sheet tab provides access to the following portals:

- Personal Details (view only access)
- Job (view only access)
- Leave (view only access)
- Training
- Staff Schedule.

### 3.5 Person Placement Field

The Person Placement field is displayed below the Menu bar. The Person Placement field lists your name, employee number, employee type and title, organisational unit and location.

Staff members with multiple active placements have access to a drop-down button, which they can use to swap between each placement.

From the MyStaff sheet tab, supervisors can use the Person Placement field to select a staff member that reports to them in order to view their contact and employment information and view any upcoming leave or internal training courses. **Note:** Supervisors have “view only” access and can only view the information for staff members that report to them.

An example of the Person Placement field is provided below.

A placement that contains no placement information is an “inactive” placement. That is, the employee number is still active but there is no current placement recorded against this employee number.
3.6 Portal

Portals are displayed below the Person Placement field. A portal is accessed by clicking a menu button provided in the Menu bar.

A portal is divided into two panels. Summary information displays on the left-hand panel and detailed information displays on the right-hand panel. Where you have access to modify information, this is done from the right-hand panel.

An example of the Home portal is provided below.
3.7 Summary Panel

The summary panel is displayed on the left-hand side of a portal. Summary panels contain a number of different grids. The grids provided in a summary panel are specific to each portal.

An example of the Home summary panel is provided below.

![Home summary panel](image)

The following grids display on the Home summary panel (Note: The grids displayed on the Home summary panel depend on your employment type. That is, continuing/fixed-term or casual):

- Mail Inbox
- Mail Sent
- Leave (This grid is only displayed if you are a continuing or fixed-term employee)
- My Settings – Mail & Supervisor
- Pay Advices
- Pending Training Nominations
- Timekeeper Forms (This grid is only displayed if you are a casual employee)
- User Guides.

3.8 Grids

Grids are displayed within a summary panel. Each grid provides access to view summary information of the records stored in MyAurion.

The grids displayed in a summary panel are specific to the portal selected. In addition, your employment type (continuing/fixed-term or casual) will determine the grids available to you from within each portal.
The summary information listed under each grid is accessed by clicking the Expand icon ( ). Selecting an item or record listed within a grid will display its details in the detail panel on the right-hand side of the portal.

Clicking the Collapse icon ( ) will close the grid.

An example of the Pending Training Nominations grid is provided below.

![Pending Training Nominations grid](image)

3.9 Detail Panel

The detail panel is displayed on the right-hand side of a portal. The detail panel contains detailed information of the item or record selected from a grid on the summary panel. From the detail panel, where you have access, you can maintain the information contained in a selected record.

The following is an example of the Name and Contact Details detail panel, displayed when the contact record is selected from the Name and Contact Details grid on the Personal Details summary panel.

![Name and Contact Details detail panel](image)
In addition, when you first log in to MyAurion, the detail panel displays the Welcome to Aurion message. This message contains an overview of how to navigate within MyAurion, as well as a summary of information, including:

- Your contact phone numbers (as recorded in MyAurion)
- Your email address (as recorded in MyAurion)
- Your default supervisor (if recorded in MyAurion)
- New or unread MyAurion mail messages (grouped into categories)
- A summary of your current leave balances
- Any upcoming leave or training.

The Welcome to Aurion message is also displayed whenever the Home button is clicked from the menu bar.

An example of the message displayed in the Welcome to Aurion detail panel is provided below.
4. Basic Functions

The following sections provide an overview of the basic functions that can be performed in MyAurion.

4.1 Logging On to MyAurion

Access to MyAurion is available from the following UQ web pages by clicking the MyAurion link provided:

- my.UQ (https://staff.my.uq.edu.au/). This page activates Single Sign on. Once you log in on this page and click on the MyAurion link you will be taken directly to the MyAurion page.
- Current Staff (http://www.uq.edu.au/current-staff/). After clicking the MyAurion link from the Current Staff web page, the MyAurion – UQ Sign In pop-up window is displayed, as shown below.

![MyAurion – UQ Sign In pop-up window](image)

Enter your UQ Sign In userid and password in the provided fields and click the Sign in button, you are logged into MyAurion and the MyAurion page displays.

**Note**: If you enter an incorrect UQ userid or password, MyAurion displays a prompt advising you that your login has failed. Click OK, in response to the prompt, to return to the MyAurion – UQ Sign In pop-up window and enter your correct UQ userid and password.

4.2 Logging Off from MyAurion

To log off from MyAurion, click the Logout option provided in the Courtesy bar in the top right-hand corner of the Page Header. You are logged out of MyAurion, and returned to the MyAurion – UQ Sign In pop-up window.
4.3 MyAurion Icons

MyAurion contains a number of different icons that can be used to perform certain actions.

Each icon provided in MyAurion is explained in the table below:

<table>
<thead>
<tr>
<th>Icon</th>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Collapse Icon" /></td>
<td>Collapse Icon</td>
<td>This icon displays when a grid has been opened. Clicking this icon closes the grid to which it relates.</td>
</tr>
<tr>
<td><img src="image" alt="Expand Icon" /></td>
<td>Expand Icon</td>
<td>Clicking this icon opens the grid to which it relates.</td>
</tr>
<tr>
<td><img src="image" alt="Help Icon" /></td>
<td>Help Icon</td>
<td>This icon allows you to access the Aurion help file relevant to your location in the application (context-sensitive help), or to access the full online Aurion help system.</td>
</tr>
<tr>
<td><img src="image" alt="Print Icon" /></td>
<td>Print Icon</td>
<td>This icon allows you to print the information listed in the relevant grid on the summary panel, or the information currently displayed in the detail panel.</td>
</tr>
<tr>
<td><img src="image" alt="Search Icon" /></td>
<td>Search Icon</td>
<td>This icon provides access to a Search frame from which you can filter the items or records that are listed in a grid.</td>
</tr>
<tr>
<td><img src="image" alt="Settings Icon" /></td>
<td>Settings Icon</td>
<td>This icon allows you to define the information displayed in a grid and the number of lines listed.</td>
</tr>
</tbody>
</table>

4.4 Drop-Down Lists

A drop-down list allows you to populate a field by selecting an option from a list of valid values.

Fields that provide access to a drop-down list are identified by the drop-down list button (.JWT), which displays to the right of a field.

An example of the Days drop-down list is provided below.

![Days drop-down list](image)
4.4.1 Using a Drop-Down List

To use a drop-down list, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Click the drop-down list button provided to the right of the field. A drop-down list of valid values for the selected field is displayed.</td>
</tr>
<tr>
<td>Step 2</td>
<td>Locate and select the required option from the drop-down list. The field is populated with the selected value.</td>
</tr>
</tbody>
</table>

4.5 Date Selection

The Date Selection function is used to select and insert a date into a Date (From or To) field.

Fields that provide access to the Date Selection function are identified by the Date Selection button ( ), which displays to the right of a field. Pressing this button displays the Date Selection window.

An example of the Date Selection window is provided below.

From the Date Selection window you can:

- Use the scroll arrows ( / ) to locate the required year and month and click on the required day to insert it in the Date field
- Click the down arrow ( ) to access the Advanced Date Selection function. This function allows you to jump to a particular month and/or year.
### 4.5.1 Using the Date Selection Function

To access and select a date from the Date Selection window, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Click the Date Selection button (     ) provided to the right of a Date (From or To) field. The Date Selection window displays.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Click the Today button to insert today’s date in the Date field, or Use the scroll arrows (     /     ) to locate the required month, within the current year, and click on the required day. The field is populated with the date selected.</td>
</tr>
</tbody>
</table>

### 4.5.2 Using the Advanced Date Selection Function

To access and use the Advanced Date Selection function, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Click the Date Selection button (     ) provided to the right of a Date (From or To) field. The Date Selection window displays.</td>
</tr>
<tr>
<td><strong>Step 2</strong></td>
<td>Click the down arrow (   ) to access the Advanced Date Selection function. The Advanced Date Selection function displays, as shown below.</td>
</tr>
</tbody>
</table>

#### Tip:
Use the scroll arrows (     /     ) provided above the year ranges, currently listed, to locate the required year.
<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 3</td>
<td>Select the required month and year from the lists provided and click the OK button. You are returned to the Date Selection window for the year and month that you selected, as shown below.</td>
</tr>
<tr>
<td></td>
<td>![Calendar Image]</td>
</tr>
<tr>
<td>Step 4</td>
<td>Click on the required day. The field is populated with the date selected.</td>
</tr>
</tbody>
</table>

### 4.6 Search Functions

MyAurion provides access to two different search functions:

- **Grid Search Function** – This search function enables you to filter the items or records that display in a grid. Grids that provide access to this search function are identified by the Search icon ( ), which displays to the right of the grid title.

- **Field Search Function** – This search function enables you to search for a valid value to populate a particular field. Fields that provide access to this search function are identified by the Search arrow ( ), which displays to the right of the field.

**Note:** It is possible for a Field Search function to be provided for a field that is displayed within a Grid Search function. For example, the Course and Program fields displayed within the Search frame for the Available Courses grid both provided access to the Field search function, as shown below.

![Available Courses grid – Search frame Image]
4.6.1 Using the Grid Search Function

To access and use the Grid Search function, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
</table>
| Step 1 | Click the Search icon (🔍) displayed to the right of the relevant grid.  
The grid opens and is divided into two sections. The Search frame is in the top section of the grid and provides access to the filter fields. The bottom section of the grid lists the summary details of the items or records that are displayed by default.  
The following is an example of the Search frame provided for the Mail Inbox grid.  

![Mail Inbox Grid Example](image) |
| Step 2 | Complete the filter fields provided within the Search frame, as required, and click the Search button.  
The Search frame is closed and the grid updates to list the summary information of the items or records that match the search criteria specified in the filter fields.  
In the below example the Inbox filter field was set to the TK mailbox, the Type filter field was set to Timekeeper and the Status filter field was set to Pending. As a result, only Timekeeper mail items with a Pending status are now listed in the Mail Inbox grid.  

![Mail Inbox Grid Example](image) |
4.6.2 Using the Field Search Function

To access and use the Field Search function, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Click the Search arrow ( ) that is displayed to the right of a searchable field. The relevant Select pop-up window is displayed and lists the valid values for the selected field. The following is an example of the Select Postcode pop-up window. This pop-up window displays when creating or updating a contact and the Search arrow provided to the right of the Postcode field is clicked.</td>
</tr>
<tr>
<td>Step 2</td>
<td>From the Select pop-up window, use the Page navigation buttons provided below the listed items to scroll through the pages until the required value is located, or Click the Search icon ( ) provided in the top right-hand corner of the Select pop-up window. The pop-up window expands to provide access to the Search Criteria frame, as shown below.</td>
</tr>
</tbody>
</table>
### Steps

<table>
<thead>
<tr>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 2...</strong> When accessing the Search Criteria frame it is important to note the following:</td>
</tr>
<tr>
<td>- The filter fields are case sensitive</td>
</tr>
<tr>
<td>- Do not press the Enter key on your keyboard, as this will not move you to the next filter field. Instead, this action will automatically select the item that is highlighted for selection in the unfiltered list of values currently displayed.</td>
</tr>
<tr>
<td>Complete the required filter fields provided within the Search Criteria frame and click the Search button. The Search frame is closed and the Search pop-up window updates to list the value(s) that match the criteria specified in the filter fields, as shown below.</td>
</tr>
</tbody>
</table>

![Select Postcode](image)

**Step 3** Once the required value has been located, select the value and click the Select button displayed in the bottom right-hand corner of the Select pop-up window.

The Select pop-up window is closed and the searchable field is now populated with the value selected, as shown below.

<table>
<thead>
<tr>
<th>Postcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>4657</td>
</tr>
</tbody>
</table>

### 4.7 Grid Display

#### 4.7.1 Customising the Grid Display

MyAurion provides you with the ability to customise how information is displayed in a grid. You can specify the number of rows and the types of columns that are displayed when a grid is accessed.

**Note:** When you log off from MyAurion, settings are returned to the default display.

To customise the display of a grid, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 1</strong></td>
<td>Click the Settings icon (⚙️) displayed to the right of the relevant grid. The Settings drop-down menu is displayed, as shown below.</td>
</tr>
</tbody>
</table>

![Settings Menu](image)
<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Step 2</strong></td>
<td>From the Settings drop-down menu, hover your mouse over the Columns option to view the list of available column types, as shown below. Using the checkboxes provided, select the column types you wish to display in the grid. As each column type is checked (or unchecked) it is automatically displayed (or removed) from the grid. When you have completed your selection, click your mouse anywhere outside the range of the displayed list to close the Settings drop-down menu, or Move your mouse to hover over the Rows option.</td>
</tr>
<tr>
<td><strong>Step 3</strong></td>
<td>From the Settings drop-down menu, hover your mouse over the Rows option to view the list of available row settings, as shown below. Click on the number of rows that you would like the grid to display. The Settings drop-down menu is closed and the grid is updated to display the specified number of rows.</td>
</tr>
</tbody>
</table>
4.7.2 Resetting the Grid Display

As you move from portal to portal, MyAurion remembers the grid settings of each portal. For example, if a grid is opened in the Home portal, the next time you access that portal (within the same session) the grid will automatically display as open.

To reset your customised grid displays to their default settings you can:

- Log off from your current MyAurion session. The next time you log on, all customised settings will be set back to the default display, or
- If you wish to reset the settings without logging out of your current MyAurion session, you can use the Restore Grid Defaults function.

4.7.2.1 Resetting All Grids

To restore all grids to their default settings, without logging out of your current MyAurion session, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Click the Settings option provided in the Courtesy bar. The Settings drop-down menu is displayed.</td>
</tr>
<tr>
<td>Step 2</td>
<td>From the Settings drop-down menu, click the Restore Grid Defaults option. The following confirmation message is displayed: “Are you sure you want to restore Grid Default Settings?” Restore  Cancel</td>
</tr>
<tr>
<td>Step 3</td>
<td>Click the Restore button. The following notification message is displayed: “Grid Defaults have been restored. OK” Click the OK button. You are returned to the MyAurion portal, all opened grids are now closed, and any customised settings are returned to their default settings.</td>
</tr>
</tbody>
</table>
4.8 Field Display

4.8.1 Read only versus Editable Fields

Non-editable fields are fields that cannot be edited, or can only be changed by entering a valid code in the Code field provided to the right of the field.

A non-editable field is shaded in grey and can be further identified by a change in mouse display (from \( \rightarrow \) to \( \leftrightarrow \)) when you hover over the field.

The following is an example of some of the non-editable fields that are displayed when selecting to modifying an emergency contact record.

Non-Editable field

```
<table>
<thead>
<tr>
<th>Emergency Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Modify</td>
</tr>
<tr>
<td>Priority</td>
</tr>
<tr>
<td>Relationship</td>
</tr>
<tr>
<td>Name</td>
</tr>
</tbody>
</table>
```

In the example provided above, the:

- Priority field cannot be updated (this field can only be updated when a new emergency contact record is being created)
- Relationship field cannot be directly updated. Instead, a valid relationship code must be entered in the Code field. If known, the Code can be typed directly into the Code field or selected from the list displayed when the search function is accessed
- Name field is available for update.

4.8.2 Mandatory Fields

Mandatory fields are fields that must be populated before a new record or request can be created in MyAurion.

Within MyAurion, mandatory fields are highlighted in red. The following is an example of a mandatory field displayed on the Emergency Contact Details detail panel, when creating a new contact.

Mandatory field

```
<table>
<thead>
<tr>
<th>Emergency Contact Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Priority</td>
</tr>
<tr>
<td>Relationship</td>
</tr>
<tr>
<td>Name</td>
</tr>
<tr>
<td>Next of Kin</td>
</tr>
</tbody>
</table>
```
4.9 Printing

MyAurion provides you with the ability to print the information contained within a grid or detail panel.

4.9.1 Print Information from a Grid

To print information displayed in a grid, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Click the Expand icon (.expand) from the icons displayed to the right of the relevant grid. The grid opens to display a list of summary information that is specific to the selected grid.</td>
</tr>
</tbody>
</table>
| Step 2 | Click the Print icon (print) from the icons displayed to the right of the relevant grid. Two pop-up windows are displayed:  
  * Aurion 10 Print – This pop-up window provides you with a preview of the data to be printed  
  * Print – This pop-up window allows you to nominate which printer the data is sent for printing.  
  **Note:** If the grid is closed when the Print icon is clicked, no data will be printed. |
| Step 3 | Select the nominated printer from the options provided on the Print pop-up window. Click the Print button displayed in the bottom right-hand corner of the Print pop-up window. The data is output to the nominated printer. |

4.9.2 Print Information from a Detail Panel

To print information displayed in a detail panel, complete the following steps:

<table>
<thead>
<tr>
<th>Steps</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Step 1</td>
<td>Click the Expand icon (expand) from the icons displayed to the right of the relevant grid. The grid opens to display a list of summary information that is specific to the selected grid.</td>
</tr>
<tr>
<td>Step 2</td>
<td>From the list of information displayed in the grid, select the item to be printed. The detailed information for the selected item is displayed in the detail panel on the left-hand side of the portal.</td>
</tr>
</tbody>
</table>
| Step 3 | Click the Print icon (print) from the icons displayed in the top right-hand corner of the detail panel. Two pop-up windows are displayed:  
  * Aurion 10 Print – This pop-up window provides you with a preview of the data to be printed  
  * Print – This pop-up window allows you to nominate which printer the data is sent for printing. |
### 4.10 Things to Note when Using MyAurion

#### 4.10.1 Internet Browser Functions

**4.10.1.1 Back Button**

MyAurion is a system of HTML (HyperText Markup Language) pages that are accessible from the one web address. That is, as you access a function or view a different portal, the web address listed in your web browser remains the same.

Clicking the Back button (            ) on your web browser will log you out of your MyAurion session and send you back to the last web page that you accessed prior to logging onto MyAurion.

**4.10.1.2 Refresh Button**

As MyAurion has a fixed web address, clicking the Refresh button (       ) on your web browser will log you out of your MyAurion session and return you to the log on page.