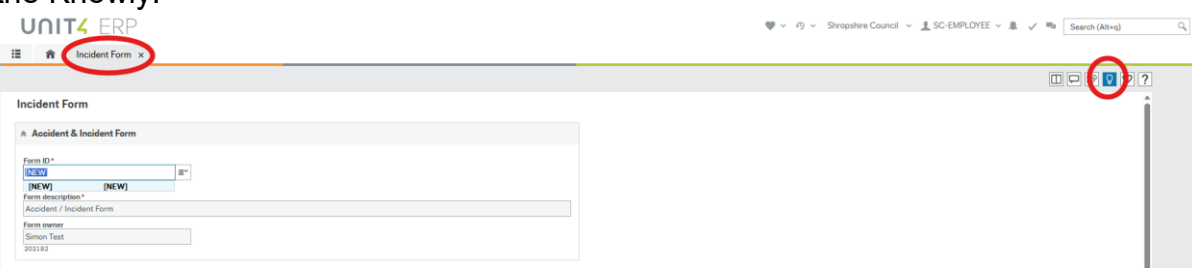
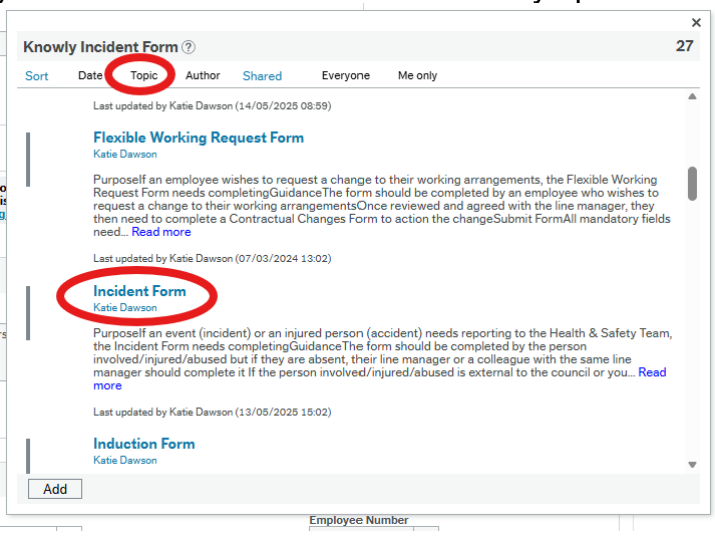


How to use Forms in the ERP

		Last Updated
1	Scope: This guidance is to show you how to use forms in the ERP	23.03.2026
2	Introduction: Forms are used in the ERP to make requests to your line manager such as Flexible Working Request form or to inform your manager such as completing an Incident Form. Line Managers request employee and position changes via the relevant forms in the ERP.	23.03.2026
3	Navigate to Main Menu → Forms	23.03.2026
4	Step by step process (<i>with videos and screenshots</i>)	
4.1	Within each form there are in system guidance notes called Knowlies. Go into the form you are required to complete and click on the light bulb in the top right to open the Knowly.  You may need to put it into alphabetical order by clicking on Topic to find the form you need. Click into it and this can stay open whilst you are completing the form. 	24.03.2026
4.2.1	In each form there is a form description field. Most forms this is greyed out, but for some it is a free text box and it's also a mandatory box. You can see that it's	



mandatory because there is a red* at the site and you will not be able to save or submit the form without having something in all the mandatory boxes.

Incident Form

4.2.2

As you can see some of the fields are pre populated. So for the form owner it will have looked at your record and it will have selected you as the form owner as the person completing the form.

4.2.3

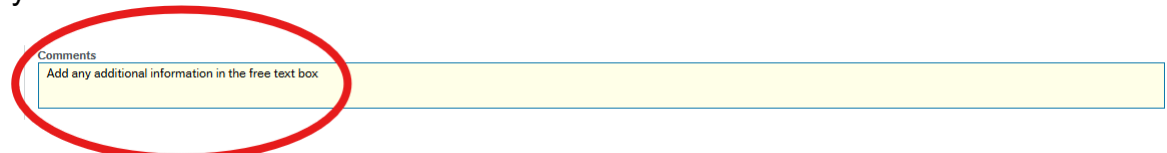
For some forms there is more than one tab within that form that needs completed. Some of these will be for your manager to complete once this is workflow to them but please check that you complete all these tabs. Complete the first one that is open and then scroll back up to the top and then check if you need to complete any more detail.

Leaver Notification Form

Click on the drop down by name and select the name and then the drop down by position and select the correct one. For example, you may have more than one position and therefore call the online manager and you need to make sure that this is selected so that it workflows to the right person. Once you have selected the correct position or whatever is in the drop down field that you are using, it's always best to use the tab key to move through the ERP because it will recognise what you've entered into that field and then move to the next field. So sometimes when you click with the mouse you're required to click twice to update the field and then to move into the next field.

4.2.4

Some fields are for free text typing, but they will have a limited number of characters that can be used. For some fields where extra information is needed, you may need to attach a document afterwards because there will be a limit on the characters that you can use.

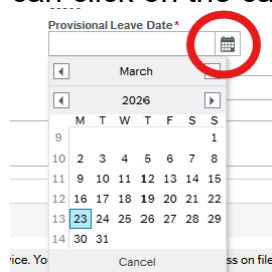


Comments

Add any additional information in the free text box

4.2.5

Then there are date fields. You can tell that they're date fields because there is a little calendar at the side and you can either type the date in and tab cross, or you can click on the calendar icon and select the correct date.



Provisional Leave Date *

March 2026

M T W T F S S

9 10 11 12 13 14 15

16 17 18 19 20 21 22

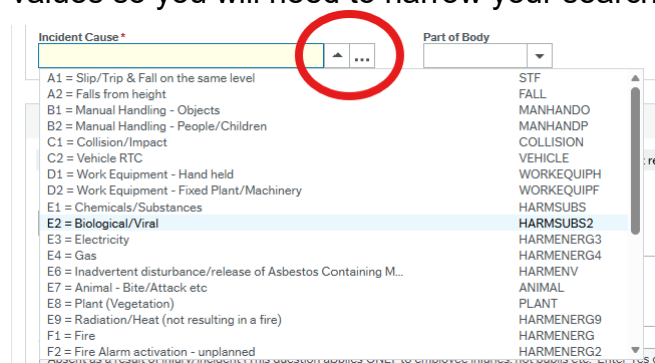
23 24 25 26 27 28 29

30 31

Cancel

4.2.6

Some fields will have predetermined answers that you will need to select from. You cannot free text type into these answer fields. You can type ahead and select and you can press the space bar, but for some of these fields there are just too many values so you will need to narrow your search.



Incident Cause *

Part of Body

A1 = Slip/Trip & Fall on the same level

A2 = Falls from height

B1 = Manual Handling - Objects

B2 = Manual Handling - People/Children

C1 = Collision/Impact

C2 = Vehicle RTC

D1 = Work Equipment - Hand held

D2 = Work Equipment - Fixed Plant/Machinery

E1 = Chemicals/Substances

E2 = Biological/Viral

E3 = Electricity

E4 = Gas

E6 = Inadvertent disturbance/release of Asbestos Containing M...

E7 = Animal - Bite/Attack etc

E8 = Plant (Vegetation)

E9 = Radiation/Heat (not resulting in a fire)

F1 = Fire

F2 = Fire Alarm activation - unplanned

STF

FALL

MANHANDO

MANHANDP

COLLISION

VEHICLE

WORKEQUIPH

WORKEQUIPF

HARMSUBS

HARMSUBS2

HARMENERG3

HARMENERG4

HARMENV

ANIMAL

PLANT

HARMENERG9

HARMENERG

HARMENERG2

You can use the value lookup so you click on the three dots to bring up the value lookup box where you can type a keyword and click search. Then you can select the correct option and it will take you back into the form with this field completed.

Value lookup

Search criteria

retirement

Advanced

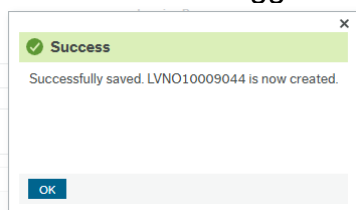
Search

Attribute value	Attribute	Description	Period from	Period to	Status	Filter
240	LVREASON	Retirement with Pension - Early	0	209999	N	
250	LVREASON	Retirement with Pension - Flexible Retir...	0	209999	N	
260	LVREASON	Retirement with Pension - Ill Health	0	209999	N	
270	LVREASON	Retirement with Pension - Normal Age	0	209999	N	
275	LVREASON	Retirement	0	209999	N	

Close

4.2.7

It is always advisable to Save as Draft when completing a form. All mandatory fields must have some data in before selecting Save as Draft and you will need to have saved a form to trigger a form ID in order to attach any documents.



4.2.8

To attach any documents to the form you will need to have saved the form. Then you will need to click on the paper clip in the top right to upload the document required that's already saved on your device.

Document archive

All documents

Change view Actions Sort by Document type priority Search

Leaver Notification Form (LVNO10009044)

Leaver Notification Form

Add a document

Add a document

Click to add the document, upload and then amend the title if needed and click Save.

4.2.9 We're now ready to submit the form so you can click Submit form.

This will then workflow to the approver or to whoever the form needs to go to next. If the form is rejected, due to more information being needed or being rejected for any other reason, that will workflow back to you and you'll receive a task alert. Go to Task management to make amendments to that form and either submit again or cancel the request.

4.2.10 Forms can't be printed off directly from the ERP but there are reports for many processes that can be exported to Excel from the ERP.

4.3 Common Forms Completed in the ERP:

4.3.1 Incident Form

You will need to complete the Incident Form to confirm details of any accidents, incidents or near misses that need reporting to Health & Safety.

4.3.2 Family Related Leave Forms

To inform your manager of your intention to take maternity, paternity, shared parental, adoption (or surrogacy adoption) or parental bereavement leave, you will need to complete the relevant form in the ERP.

4.3.3 Flexible Working Request Form

You will need to complete the Flexible Working Request Form to make a request to your manager for any changes in your working arrangement.

4.3.4 Leaver Notification Form

	4.3.5 You will need to complete the Leaver Notification Form to inform your line manager of your intention to leave your position. It will workflow to your manager to finish completing before workflowing to HR Payroll to finalise. <u>Exit Questionnaire</u> You will need to complete the Exit Questionnaire to confirm your reasons for leaving and any other information you wish to share. 4.4 All Previous Forms for Your Resources: Line managers can see all previous forms submitted for the resources that they currently manage by navigating to Main Menu > Your employment > All Previous Forms for Your Resources. They will see forms submitted by the resource, themselves as line manager and line managers who have previously held their post. The dashboard is broken down into Contract forms, Maternity/Adoption and Surrogacy forms, Parental forms and Flexible and Miscellaneous forms. You can click on the Form ID within the sections, and to access all the forms data / information.	
5	Related guidance and policies ERP Support Page - Forms Accident and Near Miss Reporting Family leave Flexible working policy Leaving the council	23.03.2026