How to Navigate the ANU Insight Portal

The ANU Insight portal is a web application from which the University’s self-service reporting can be accessed. At present research, finance, student, human resource and Chief Investigator Financial Reports are available through the ANU Insight Portal.

The portal can be accessed at:

https://insight.anu.edu.au/

Single sign-on has been enabled so most users will be automatically directed through a link to the portal home page. However, a small number of users as a result of their network configurations or the browser they are using will be prompted to enter a username and password. Please login with your UDS/HORUS user ID and password in the format:

User Name: UDS\User ID (e.g. UDS\u1234566)
Password: your UDS or HORUS password

Step by step instructions on how to do this can be found in the How to log into ANU Insight document or if you are experiencing issues please contact the ANU Insight team on:

Email: insight@anu.edu.au
Phone: +61 2 6125 8649

When you first access the portal you will be directed to the ANU Insight portal home page.
The portal is available and has been tested on both Mac and PC, and on many browser versions and mobile devices. However, if you are experiencing any issues in terms of how the portal produces reports or functions, please contact us on insight@anu.edu.au and for a full list of supported browsers, please refer to the frequently asked questions in the FAQ ANU Insight document.

There are 7 parts to the ANU Insight portal home page and each of these is detailed below:

1. The Navigation Menu

This section is known as the Navigation menu.

<table>
<thead>
<tr>
<th>Human Resources</th>
<th>Student</th>
<th>Financial</th>
<th>Research</th>
<th>Campus</th>
</tr>
</thead>
</table>

It is used to navigate to and access reports. To access reports click on the types of reports you are after.

For example if you want to access Chief Investigator Financial Reports (also known as abbreviated title CI Reporting):

- **left click once** on the Financial menu header

This would then open and display the Financial sub menu.

<table>
<thead>
<tr>
<th>Human Resources</th>
<th>Student</th>
<th>Financial</th>
<th>Research</th>
<th>Campus</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial Mgmt</td>
<td>CI Reporting</td>
<td>Planning</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Periodic reporting</td>
<td>Research project reporting</td>
<td>Budgeting and forecasting</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

You can identify which sub menu you are looking at as the chosen menu header will be slightly expanded to indicate it has been selected.
To access the reports the user then selects the sub menu category by *left clicking once*. For example to access CI Reporting this would mean clicking on the *CI Reporting* sub menu option.

![CI Reporting](image)

This would then access the **Chief Investigator Reporting** page.

<p>| | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Insight Home</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Human Resources</td>
<td>Student</td>
<td>Financial</td>
<td>Research</td>
</tr>
<tr>
<td>3</td>
<td><strong>Financial / CI Reporting</strong> : Research project reporting</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Reports</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Portfolio report pack</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Project report pack</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Subcontract report pack</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Further Analysis</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finance and Business Services</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Help and Support</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>CI Reporting Help</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ANU Insight Help</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>ANU Insight Taxing</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email: <a href="mailto:insight@anu.edu.au">insight@anu.edu.au</a></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone: 0123456</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Each of the **Reporting Access** pages have 6 sections.

1. **The Insight Home Button**

   ![Insight Home](image)

   The insight home button can be pressed using *left click once* and will return you to the **ANU Insight Portal Home** page

2. **The Navigation Menu**

   ![Navigation Menu](image)

   Works just like the navigation menu on the ANU Insight Portal detailed above.
The Breadcrumb Reference

Financial / CI Reporting: Research project reporting

Just like in the Hansel and Gretel fairy-tale, the Breadcrumb Reference is designed to provide you with a trail of breadcrumbs to help you understand where you have navigated to and from.

- The first half of the breadcrumb trail in bold:

  Finance / CI Reporting:

  represents the Main and Sub menu items, separated by a /, which you have navigated through to reach your current page.

- The normal text:

  Research project reporting

  provides a description of the reporting on the page.

The Reports List

The reports list provides a list of reports which can be accessed and run in the portal on this topic.

If you hover your mouse over the report a description of the report will display.

<table>
<thead>
<tr>
<th>Reports</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Portfolio report pack" /></td>
</tr>
<tr>
<td><img src="image" alt="Project report pack" /></td>
</tr>
<tr>
<td><img src="image" alt="Subproject report pack" /></td>
</tr>
</tbody>
</table>

**Portfolio report pack**

Contains:

- **Project life financial summary report**
  Contains a list of all projects and sub-projects held in the Chief Investigator’s name and provides a summary of the financial information associated with each project and sub-project from its start date to the current financial period.
This description will provide some basic details on the report without the need to open and run the report.

If the report description displays the term *(Secured)* after the report title this means additional security access is required before you can run the report. If you *hover your mouse* over the word secured it will explain the nature of the security in more detail. If you believe you require access to this report please contact us on *insight@anu.edu.au* and we will assist you in getting this approved.

The icons to the left of the report indicate the type of report:

- ![icon](image) = detail level report
- ![icon](image) = summary level report, often containing aggregated tables and graphs

To run a report *left click once* on the report name.

**Portfolio report**

Detail on how to actually run a report and other report running options can be found on the Insight web page at [https://services.anu.edu.au/information-technology/software-systems/insight](https://services.anu.edu.au/information-technology/software-systems/insight)

At times in the ANU portal you may see custom information messages. These messages will appear in red as per the below example:

These reports are temporarily unavailable. The most common reason is that the Insight database is in the process of being updated. For more information, please contact Planning & Performance Measurement at ppm-helpdesk@anu.edu.au.

They contain important information regarding the current status of reports and your access.

**Further Analysis Section**

**Further Analysis**

*No links to further analyses are available*

The further analysis section provides links to additional reports and websites which may provide further insights into the chosen topic area.

If no further analysis links are available the following text will display:

*No links to further analyses are available*
Links will appear like those below for Student Analytic Reports if they exist:

- Student Dashboard
- Student Enrolments 2010 - 2014 Pivot Table
- Student Load 2010 - 2014 Pivot Table

They can be accessed by *left clicking once* on the link.

### Help and Support Section

#### Help and Support

- ANU programs and courses
- Important dates

The help and support section will display links to documentation, user guides and other information to assist the user in using the reports. These documents and web pages can be accessed by *left clicking once* on the link.

If no additional Help and Support links are available then you should contact the ANU Insight team for further assistance and the contact details will display in the section as below:

#### Help and Support

No links to support documentation are available for this topic. Please contact Planning and Performance Measurement; we would be happy to provide you further information directly.

**Email**  ppm.helpdesk@anu.edu.au

**Phone**  6125 8649
2. Help and Support

The Help and Support section of the ANU Insight Portal provides direct access to pages within the Planning & Performance Measurement Division website which provide details on how to seek help, access help documentation or information on upcoming training.

3. News Section

The News section provides a quick snapshot of important information for our users. Common news items you should expect to see advertised here include:

- Availability of New Reports
- System Outages
- New projects and requests for input and involvement
- Upcoming Training and Information Sessions

Each button will take you to more detail on the Planning & Performance Measurement Division’s web pages and can be accessed by left mouse clicking the News button once.

4. Recently Accessed Reports

The Recently Accessed Reports list will provide you with a shortcut list to the 5 reports which you have more recently accessed in the ANU Insight Portal.

You can run the reports by left clicking once on the name as in other parts of the ANU Insight Portal.
When you first log into the portal, as you will not have ever run reports, you will receive a message indicating this as per the below:

**You have not run any reports yet**

5. **My Frequently Accessed Reports**

The *Frequently Accessed Reports* list will provide you a shortcut list to the 5 reports which you have most frequently accessed in the ANU Insight Portal.

My frequently accessed reports

| Financial | Portfolio report pack |

You can run the reports by *left clicking once* on the name as in other parts of the ANU Insight Portal.

When you first log into the portal, as you will not have ever run reports, you will receive a message indicating this as per the below:

**There are no reports available in this category**

6. **Recommended Reports**

The *Recommended Reports* list will provide you a shortcut list to up to 5 reports which have been recommended to you based on your role.

Recommended reports

<table>
<thead>
<tr>
<th>Portfolio report pack</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project report pack</td>
</tr>
<tr>
<td>Subproject report pack</td>
</tr>
</tbody>
</table>

You can run the reports by *left clicking once* on the name as in other parts of the ANU Insight Portal.

If you do not have any *Recommended Reports* the following message will display:

**You don’t have any personalised recommendations yet. Watch this space!**
7. The Insight Menu Bar

Found on the top right of the screen, the menu bar contains system functionality available to users within the portal environment.

Logon Details

The first section provides the name of the user logged into the system and provides a link to allow a user to log off.

For security reasons you should use this link to log out when you have completed your session.

Refresh Button

The Refresh button refreshes the content visible on the page. This may be necessary, for example, to display reports you have just saved.

Search Function

The Search Function allows you to search the reports database by reports by key term.

By clicking on the downwards arrow next to the magnifying glass a menu will appear:

This allows you to limit your search by field.

The Home Button

Will return you to the default ANU Insight Portal page.
My Preferences Button

The *My Preferences* button contains some advanced options for users who need to manage reports and schedules, and who are receiving messages from the system. Most users will not have a requirement to use this functionality and therefore for most users the options will all return blank pages. Those users who do need to use this menu will be provided advice and training from the ANU Insight team.

The Launch Button

The *Launch* button is a shortcut menu for report developers who need to develop reports for users. Most users will not have access to any capabilities under the Launch button. Those users who are given report authoring capabilities will receive training from the ANU Insight team on the use of this button.

Help Button

The *Help* button provides generic help information on the software that runs the ANU Insight system which is known as IBM Cognos. Users looking for help in using the reports and content in the portal should seek this through the Insight web page at [https://services.anu.edu.au/information-technology/software-systems/insight](https://services.anu.edu.au/information-technology/software-systems/insight) rather than using this generic assistance.

Tab Menu

The final part of the ANU Insight Portal is the *Tab Menu*.

All users will default to the *Portal Tab* which displays as *Insight Home*. If a user selects the *My Folders* tab they will see the following view:

The *My Folders* tab is where a user’s customised versions of reports can be found and accessed. A user can manage content in this tab and how it is arranged.
Not all users will have customised My Folders content but for those who do, or would like to, detailed instructions on the use of this tab can be found separately at the Insight web page at https://services.anu.edu.au/information-technology/software-systems/insight

Tab Management Button

The Tab Management button allows a user to remove a tab or modify the sequence that tabs display. It is used in complicated reporting environments which contain many more tabs than those currently available within ANU Insight. If you accidently remove a Tab please contact the ANU Insight team on insight@anu.edu.au for assistance in retrieving it.