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, the following are available through the ANU Insight portal:

- Chief investigator financial reporting
- Financial reporting - income statement
- HR eForm reporting
- Payroll costing analysis reporting
- Performance development review reporting
- Publication validation reports
- Research costing, pricing and approval reporting
- Research reports
- Statement of academic activity reporting
- Student analytics reports
- Student eForm reporting
- Travel reports
- Work health and safety reporting.

The ANU Insight portal can be accessed at:

- https://insight.anu.edu.au/analytics/bi/

Users 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 ID (e.g. 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 ANU Insight portal you will be directed to the ANU Insight portal home page.

The ANU Insight portal is available and has been tested on a number of browsers and operating systems including both Mac and PC. The preferred browsers are Internet Explorer or Chrome. Due to performance issues, the use of other browsers (such as Safari or Firefox) is not recommended for the purposes of accessing ANU Insight reports.
There are seven parts to the ANU Insight portal home page and each of these is detailed below:

1. **Navigation and viewing a Report**

   This section is known as the *Navigation* menu. It is used to navigate to and view reports.

   To navigate to a particular set of reports (e.g. **Chief Investigator Financial Reports** (also known by the abbreviated title CI financial reporting)), click once on the ‘CI financial reporting’ hyperlink:

   ![Navigation Menu](image)

   This will then provide a list of all available CI financial reports:

   ![Financial Reports](image)

   To access a particular report, the user then selects the report listed in the lower half of the screen.

   ![Report Selection](image)
For example, the CI financial reporting screen has the following six sections:

1. The Insight Home link

   [Insight Home](#) »

   Clicking once on the Insight home link will return you to the ANU Insight Portal Home page.

2. The Navigation Menu


3. The Breadcrumb reference

   [Insight Home](#) » Financial » CI financial reporting

   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 Reports List

<table>
<thead>
<tr>
<th>Report packs</th>
<th>Exception reports</th>
</tr>
</thead>
<tbody>
<tr>
<td>Portfolio report pack</td>
<td>Exception Report</td>
</tr>
<tr>
<td>Subproject report pack</td>
<td>Exception dashboard: Issue type and count cross tab for colleague (printer friendly)</td>
</tr>
<tr>
<td>Project report pack</td>
<td>Exception dashboard: Issue type and count cross tab for schools (printer friendly)</td>
</tr>
<tr>
<td></td>
<td>Exception dashboard: Issue type and count column chart (printer friendly)</td>
</tr>
<tr>
<td></td>
<td>Exception dashboard: 5 account issue type and count column chart (printer friendly)</td>
</tr>
</tbody>
</table>

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

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

**Portfolio report pack**

**Chief investigator portfolio 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 believe you require access to this report please contact the ANU Insight Service Desk via email on insight@anu.edu.au or phone on +61 2 6125 8649 and we will assist you.

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

- = detail level report
- = summary level report, often containing aggregated tables and graphs

To run a report click once on the report name.

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
At times in the ANU Insight 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 insight@anu.edu.au.

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

5 Further Analysis Section

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

6 Help and Support Section

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 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.
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

<table>
<thead>
<tr>
<th>News</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>03/10/2017 ANU Insight has been upgraded</td>
<td>The ANU Insight portal has gotten a new look</td>
</tr>
<tr>
<td>12/09/2017 New income statement report</td>
<td>A new income statement report is available</td>
</tr>
<tr>
<td>12/09/2017 Research costing and pricing reports</td>
<td>Research costing and pricing reports have been released</td>
</tr>
</tbody>
</table>

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 link will take you to more detail on the Planning & Performance Measurement Division’s web pages and can be accessed by clicking on the News button once.
4. Recently Accessed Reports

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

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

When you first log into the ANU Insight 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. Frequently Accessed Reports

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

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

When you first log into the ANU Insight 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 five reports which have been recommended to you based on your role.

```
Recommended reports

Portfolio report pack
Project report pack
Subproject report pack
```

You can run the reports by 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 of the screen, the menu bar contains system functionality available to users within the ANU Insight 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.
Side Menu

The side menu provides additional functionality. When you select an option a further menu pops out for you to use.

**Home Function**

The *Home Function* will return you to the default ANU Insight portal page.

**Search Function**

The *Search Function* allows you to search the reports database by report name and by key term.

**My Content**

This will display any of your own content.

**Team Content**

This will provide you access to a team area if you are a member of a team.

**Recent**

This will provide your recently viewed content.

**New**

The *New* 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 New button. Those users who are given report authoring capabilities will receive training from the ANU Insight team on the use of this 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 rather than using this generic assistance.