How to run a report in the ANU Insight Portal

To run a report within the ANU Insight Portal you *left click* on the report name.

If the report has a prompt page it will display. An example is this prompt page for a Chief Investigator Report.

A prompt page provides a report user with options they can select to ensure that the report which is generated by the system meets their needs.

There are many different types of prompts you may be presented with on a prompt page. Some of the more common forms include:

- **Radio Buttons:** where you click on the button to select your choice

- **Drop Down Menu’s:** where you click on the downward arrow, a list of options appear from which you select your choice by clicking on it

- **Straight Data Entry Fields:** where you enter / type in information

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**PORTFOLIO REPORT**

Look up Chief Investigator by:

- University ID
- Name

The report will run for:

- Current Period
- Other Periods

Select Year (required): 2014

Enter your University ID (required):

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Version 1.1
• **Search Prompts**

*Search Prompts* which require you to enter a keyword and click search before a list of options is generated for example (note CI refers to Chief Investigator):

Enter CI’s surname (or the beginning of surname) (required):

**Keywords:**
Type one or more keywords separated by spaces.

![Search Form](image)

**Choice:**
- Smith, Annabel Lisa
- Smith, Benjamin Richard
- Smith, Cobi Allison
- Smith, Jeremy Ingle
- Smith, Julie Patricia
- Smith, Michael Harrison
- Smith, Paul Nathaniel
- Smith, Thomas Martin
- Smith, Wayne Trevor
- Smithson, Michael James

• **Multi-Tier Cascading search prompts**

These may either automatically cascade or they may require you to click on a button in order to generate a second set of options dependent on the selection in the first. Two examples are shown below:

**Example 1**

Cascading Drop Down List prompts. The selection of periods in the second drop down list is dependent on the selection in the first:

Select Year (required):

Select Period (required):
Example 2

A search prompt has been used to find a list of Chief Investigators (CI’s). When a CI is selected the user hits the generate project list button to generate a project list for the chosen CI.

Tree Prompt

Where a user is given a tree hierarchy and may select to run the reports at different levels of the hierarchy, for example for the whole ANU, for a College, for a School or for an Individual Account.
Prompt values can be either Optional or Required. If a prompt value is Required you will not be allowed to run the report until a value has been entered. Prompt values which are Required can be differentiated in a number of different ways:

1. The word (required) in brackets may show after the instructions
2. The red * will appear next to the prompt box
3. A red broken line ---------------- will appear under the prompt until a valid value is entered

**Prompt Navigation**

Some reports may have a single or multiple prompt pages, but all will have a prompt navigation menu at the bottom of the page.

The available buttons on this menu will appear as either:

- greyed out (not able to be clicked)
  ```
  < Back
  ```

  or

- black writing (can be clicked)
  ```
  Cancel
  ```

There are four available options:

- **Cancel** cancels the running of the report and will return you to the prompt page
- **Back** allows you to go back and change prompt values on a previous prompt page
- **Next** allows you to skip a prompt page
- **Finish** must be pressed before the report is run

**Important**

The Prompt Finish Button must be pressed before a report can be run and will remain greyed out until all required prompts have valid values selected.

After you press Finish you will see a report is running dialog box as shown following.
This box will display while the system retrieves the data from the database and generates the report.

The ANU Insight team aim for most reports to run in under 5 seconds, with a few complex reports taking a little longer. If you do not wish to wait for the report to be generated you can left click once on Select a delivery method, which will give you the option to email the report to yourself when it has finished running.

When a report generates it will have a header and a footer which contain some options for a user.

**Report Viewer Header**

The *Report Viewer Header* appears on every report which runs inside the web browser. It includes the:

- report name

- details of the user running the report and the ability for the user to Log Off the system
• home button to return to the ANU Insight Portal Home page

• about link

The About link will simply provide some basic version information on the system the ANU uses to deliver the self service reports called IBM Cognos.

The Report Action Menu

The Report Action Menu can be found on the upper right of the screen under the Report Viewer Header

Each potential action will be explained below:

Keep This Version
The keep this version menu allows a user to keep a version of the report. A user has two options to either email the report or to save a report view.
Option 1: Email the Report

When a user selects the *Email Report* option the following dialog box will appear.

The first option is to choose the recipients of the email. The dialog box will default to the user in the To: box as shown below:

![Email dialog box](image)

Despite the To: field not showing an email address, if you leave this as the default it will successfully email.

A user can add additional recipients into the email by typing in an address. However, please be aware that if you choose to do so you need to ensure that they are authorised to receive the information otherwise you could be in breach of the University’s policy’s in relation to privacy, confidentiality, use of information systems and code of conduct.

The *Select the recipients…* option on the left under the CC box should NOT be used.

![Select the recipients](image)

This requires the user to navigate through the Cognos security environment which is difficult and time consuming. It is much simpler to enter an email address.
The next section is the Subject and Body of the email:

What is entered here will show up in the email as shown below:

The final option is to select whether the report will be attached, included as a link or both:

- **Include a link to the report**

  Warning: If you select the *Include a link to the report* option the link will appear in the email as per the below which is not intuitive:

  HTML

  In addition, if the recipient clicks on this link then they must be an authorised user of the ANU Insight environment to be allowed to run the report. If they are not then they will receive an error message. Also, if they are a user then they will be able to run the report but they will not know what prompt values you had entered in order to replicate what you have sent them unless you specify this in the text.

- **Attach the report**

  If you select the *Attach the report* option the report will not attach as an email attachment but rather the HTML will embed in the email. However, the user will be able to see all the report content just as you could see it before you send it so this is the preferred option.
Option 2: Save as Report View

If you select the *Save as Report View* option from the menu the following dialog box will appear:

Add a meaningful name for your report

Please remember to change the name of the report to something relevant.

Most users will only have authorisation to save the report view into their *My Folders* so please *left click once* on *Select My Folders* under the location selection.

Click OK to save the report

If you now return to the *ANU Insight Portal* and select the *My Folders* tab.
You will be able to see the report you saved.

![Image of report]

**Warning:** This report is simply a link to the report available in the reporting pages. If you run the report as is, your specific report view will not be saved and you will need to re-enter prompt values.

If you would like to set the prompt values for this report link so they do not need to be re-entered and it always defaults to the same content you need to select the Properties icon:

This icon can be found on the right hand side of the screen under the **Action** section.

When you click on the Properties icon the following dialog box will appear:
Select the **Report View** tab.

![Set properties - Richelle's Report View of Portfolio Report](image)

This will give you the options you need to change.

- **Under Default action** change the property from *View most recent report* to *Run the report*.

![Default action: View most recent report Run the report](image)

This will ensure that you always get the most recent version of the data, this is especially important if you are setting a dynamic prompt value such as current period.

- **Under the Prompt values section** uncheck *Prompt for values* and then select *Set*:

![Prompt values: No values saved Set... Prompt for values](image)

This will run the report prompt screens. Set your required values. From this point on you will be able to run this report view and the prompt values will be saved and will not need to be re-entered.

**Warning** – Due to the complicated nature of a number of the Chief Investigator Reports this process requires administrator intervention. If you are unable to complete the process please contact the ANU Insight team at insight@anu.edu.au.

**Run Report Button**

The Run Report button ![Run Report Button](image) allows the user to re-run the report. The report will still prompt the user in the prompt pages but the most recent selection will be the default.

**Drill Up and Down Buttons**

The Drill Up and Down buttons ![Drill Up and Down Buttons](image) allows a user to drill up and down on data if this has been enabled in the report. If this has not been enabled it will appear grey as shown.
Report Output Button

The Report Output button allows a report user to change the output format of the report. The report can be run in HTML, PDF, XML or Excel. On most computers there will be 4 alternative Excel output formats.

HTML
The default format for the report when run inside the web portal.

XML
The XML output format is used for administrators and other advanced content developers. It will display the portable web code underneath the report and is best avoided by the average user.

```xml
<metadata>
  <item name="GLC" type="xs:string" length="502"/>
  <item name="Aires ID" type="xs:string" length="502"/>
  <item name="Donor Ref#" type="xs:string" length="502"/>
  <item name="Project Name" type="xs:string" length="502"/>
  <item name="Project Start Date" type="xs:dateTime"/>
  <item name="Project End Date" type="xs:dateTime"/>
  <item name="Original Funds Awarded" type="xs:decimal" scale="3" precision="45"/>
  <item name="Income Received to Date" type="xs:decimal" scale="3" precision="45"/>
  <item name="Income to be Received" type="xs:decimal" scale="3" precision="46"/>
  <item name="Original Funding Allocation" type="xs:decimal" scale="3" precision="40"/>
  <item name="Current Available Funds" type="xs:decimal" scale="3" precision="40"/>
  <item name="Projected Available Funds" type="xs:decimal" scale="3" precision="46"/>
  <item name="Total(A Budgeted Amount (Original Funding Allocation))" type="xs:decimal" scale="3" precision="46"/>
  <item name="Total(B Actuals Posted Amount)" type="xs:decimal" scale="3" precision="46"/>
  <item name="Total(C Income to be Received)" type="xs:decimal" scale="3" precision="44"/>
  <item name="Total(D Budgeted Amount (Original Funding Allocation))" type="xs:decimal" scale="3" precision="41"/>
  <item name="Total(E Actuals Posted Amount)" type="xs:decimal" scale="3" precision="41"/>
  <item name="Total(F Encumbrances Amount)" type="xs:decimal" scale="3" precision="47"/>
  <item name="Total(G Current Available Funds)" type="xs:decimal" scale="3" precision="47"/>
  <item name="Total(H Projected Available Funds)" type="xs:decimal" scale="3" precision="47"/>
</metadata>
```

PDF

PDF is the preferred output format for distribution, saving and printing. Once the report has been generated as a PDF it is pre-formatted for printing, pagination is handled correctly and it can be distributed without risk of numbers being easily over-ridden.
Excel 2002 should be used for users with older computers.

Excel 2007 Data & CSV extracts the data from the reports but does not export the formatting.

Excel 2007 format extracts the report into Excel but retains the report formatting.

Add this Report Button

The Add this report button allows you to create shortcuts to the report.

- The first option, Add to My Folders, will create a shortcut to the report into your My Folders tab. A shortcut differs from a report view because the prompt values are set but is a useful option for users who wish to place a shortcut to their favourite reports in their My Folders environment and reduce their navigation needs.

When this option is selected the following dialog box will appear, giving you options to rename and add descriptions to ensure it is meaningful to a user.
• The Add to Bookmarks option will save a bookmark into your web browser bookmark. If you are using Internet Explorer the dialog box will resemble the one below. Other browsers will differ slightly.

![Add to Bookmarks dialog box](image)

**Edit Report Button**

This Edit Report button provides an administrator or report developer access to open the report in development mode for editing. Most users will not have this functionality.

**Report Footer**

All reports in the ANU Insight portal contain a standard footer which explains a variety of information about the report.

- **Page** - you will note the Page 1 of ?. The ? displays when the report is generated in HTML. HTML does not have a sense of pages being a standard screen with a scroll. Once the report is re-generated in PDF and Excel the number of pages will be known and the ? updated.

- **Report run at** date and by indicates the date and time the report is run and by which users. This helps both the user understand versions as well as the ANU Insight team troubleshoot any issues.

- **Data as at** date and time provides information on when the data warehouse was last updated from the source system.

The ANU Insight systems draws data from the University’s core administrative system into a separate database. This prevents the volume of users running reports impacting the performance of core systems which are running business critical processes such as payroll, enrolments, student self-service and accounts payable and receivable.

Data is scheduled to load into the data warehouse on different levels of frequency, depending on the data source, it could be daily, weekly, fortnightly, monthly or yearly. Information on how often each data set updates can be found at the ANU Insight website [https://services.anu.edu.au/information-technology/software-systems/insight](https://services.anu.edu.au/information-technology/software-systems/insight).
• **Source** indicates if the report, as in most cases, is running from the IMIS data warehouse or occasionally over a different database.

• The last item is contact details for help should you experience any challenges with the report.