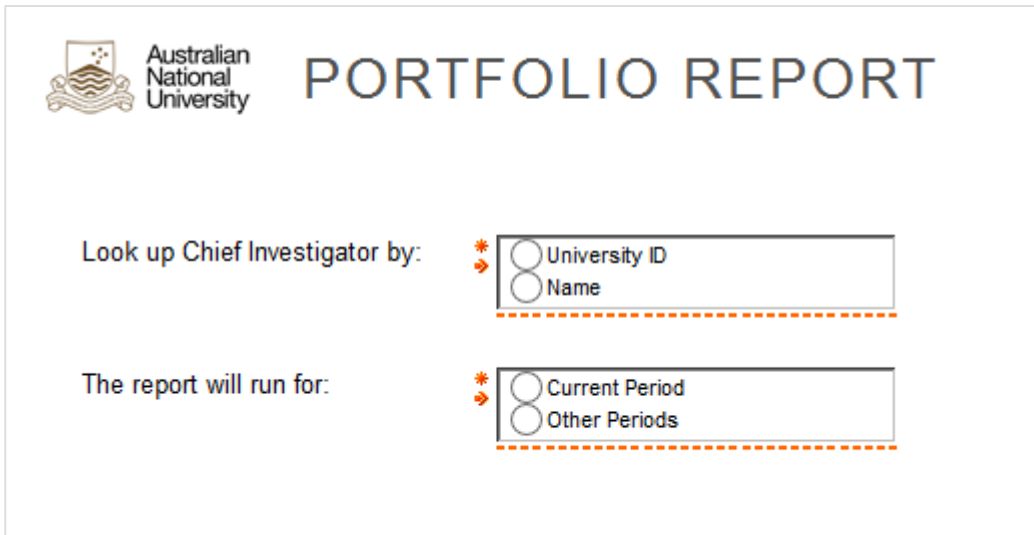


How to run a report in the ANU Insight Portal

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

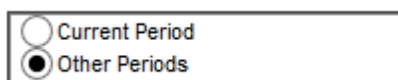
If the report has a prompt page it will display. An example is this prompt page for a Chief Investigator Report.



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 Menus:** 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



- **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.

Smith

[Options](#) ▾

*** Choice:**

- Smith, Annabel Lisa
- Smith, Benjamin Richard
- Smith, Cobi Alison
- 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.

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

Keywords:
Type one or more keywords separated by spaces.

[Options](#) ▾

*** Choice:**

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

Select the Project you would like to run (required):

*** Choice:**

- Q30510T2 - Inactive
- Q30510T6 - Inactive
- Q30510T9 - Inactive
- S3010033 - Active
- S30510H7 - Inactive
- S30510I2 - Inactive

- **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.

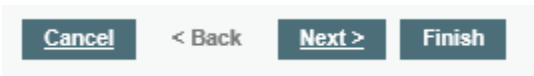
- All
- <<Unknown L1>>
- ANU
 - <<Unknown L2>>
 - Academic Support
 - Administrative Support
 - ANU
 - Colleges
 - College of Arts & Social Sciences
 - College of Asia & the Pacific
 - College of Business & Economics

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

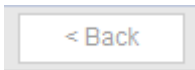
Prompt Navigation

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



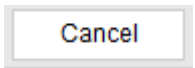
The available buttons on this menu will appear as either:

- greyed out (not able to be clicked)



or

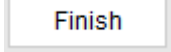
- black writing (can be clicked)



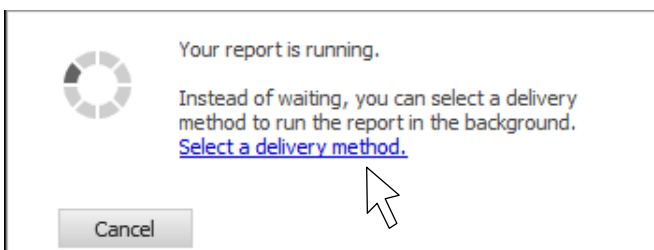
There are four available options:

- 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

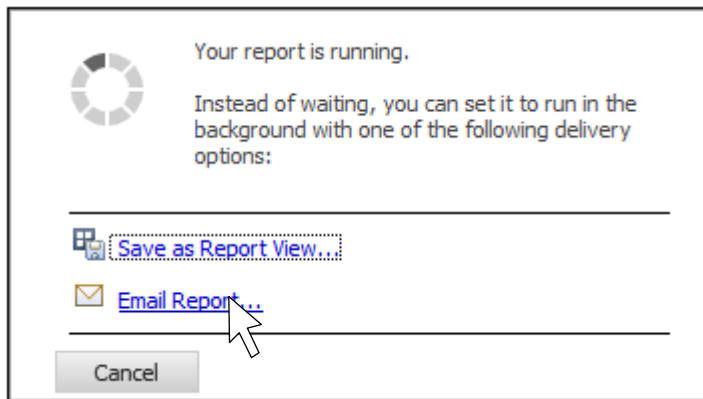
The Prompt Finish Button  must be pressed before a report can be run and will remain greyed out until all required prompts have valid values selected.

After you press *Finish* you will see a report is running dialog box as shown following.



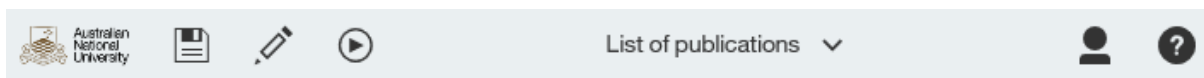
This box will display while the system retrieves the data from the database and generates the report.

The ANU Insight team aim for most reports to run in under five 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 *click once* on *Select a delivery method*, which will give you the option to email the report to yourself when it has finished running.

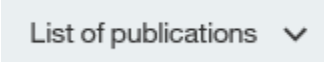






When a report generates it will have a header and a footer which contain some options for a user.

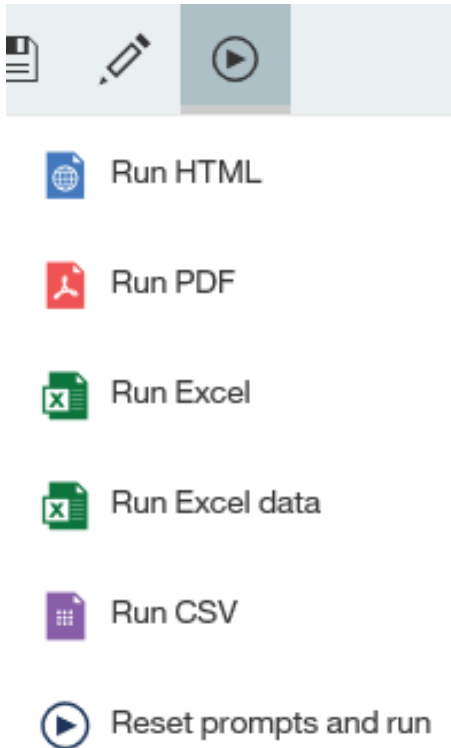
Report Viewer Header



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

-  Report name in the centre
-  Details of the user running the report and the ability for the user to Log Off the system and access help.
-  Save button to save the report as a report view
-  This Edit Report button provides an administrator or report developer access to open the report in development mode for editing.
-  The Run menu

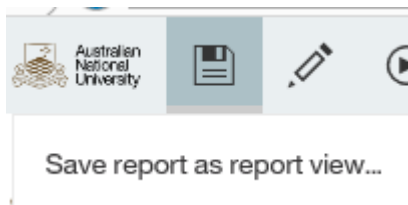
The Run Menu



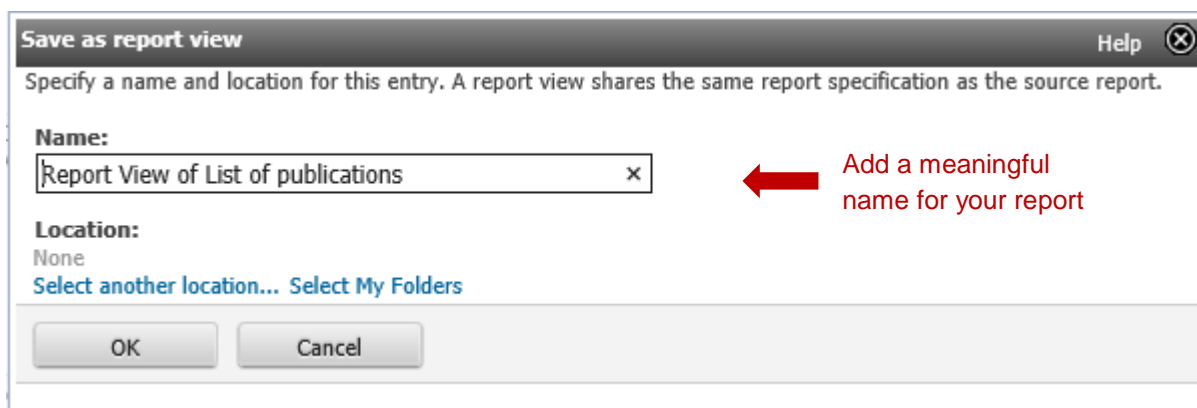
The *Run Menu* can be found on the upper left of the screen.

Some actions are explained below:

Save as Report View



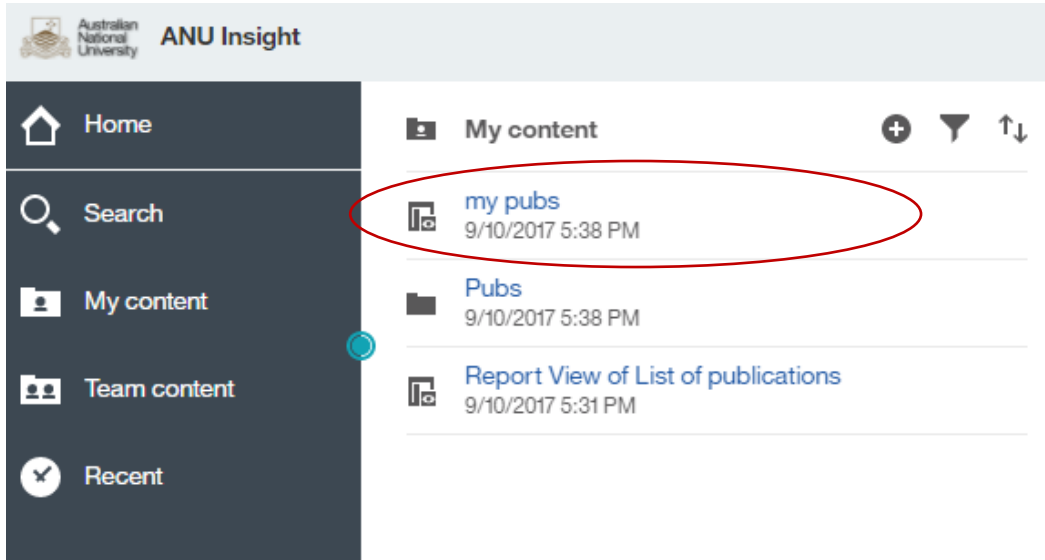
If you select the *Save as Report View* option from the menu the following dialog box will appear:



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 *click once* on [Select My Folders](#) under the location selection. This on the home page side menu and is also called *My Content*.

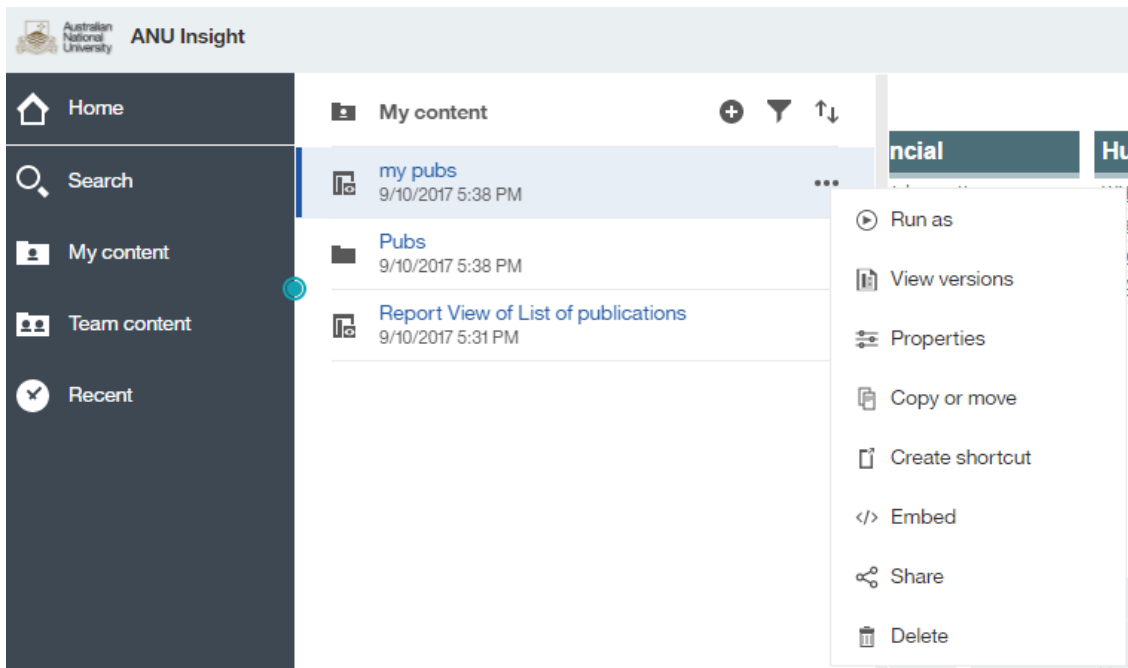
If you now return to the **ANU Insight Portal** and select the **My Content** and the reports will be displayed here. You may have to refresh to see them.



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:

You can access this from  on the right of your report



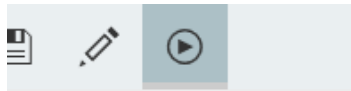
When you click on *Properties* you will be presented with various options.


Run Menu

The Run menu  allows the user to select report output options.


Report Output


From the run menu you are able to select the following:




 Run HTML

 Run PDF

 Run Excel

 Run Excel data

 Run CSV

 Reset prompts and run

HTML

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

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

Extracts the data from the report into Excel but retains the report formatting.

Excel Data

Extracts the data from the reports into Excel but does not export the formatting.

CSV

Extracts the data from the reports into Comma Separated Values for opening in a spreadsheet

Reset prompts and run

Restarts your report from the beginning with new prompts.

Report Footer

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

Page 1 of ?
Report run at 2017-10-10 8:04:33 AM by (U1038734)
Data as at 08/10/2017
Source ANU Insight Data Warehouse

For support please contact the ANU Insight team: insight@anu.edu.au

- **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 user. 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>.

- **Source** indicates if the report, as in most cases, is running from the data warehouse or occasionally over a different database.
- The last item is contact details for help should you experience any challenges with the report.