

# Step by Step Instructions

## Running the EFTSL by funding group report

### The EFTSL by Funding Group Report

- Contains a summary view of the distribution of the EFTSL by funding group for the selected year and teaching organisational unit
- Drills-through to individual student records for students enrolled in courses for the selected year and teaching organisational unit, grouped by the funding group.

### Logging into Insight

The **EFTSL by funding group report** is accessed via the University's Information Management System known as ANU Insight.

The ANU Insight portal from where the reports can be accessed can be found below:

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

Single sign-on has been enabled so most users will be automatically directed to the portal 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.

If you are one of the few users affected, please log in with your UDS/HORUS user ID and password in the format:

<b>User Name:</b> UDS\User ID (e.g. UDS\u1234566)
<b>Password:</b> 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 via:

Email: [insight@anu.edu.au](mailto:insight@anu.edu.au)

Phone: +61 2 6125 8649

## Insight home page

When you first access the portal you will be directed to the **ANU Insight** portal home page as shown below:

The screenshot shows the ANU Insight portal home page. At the top left is the Australian National University logo and the word 'Insight'. Below this is a navigation bar with 'Insight Home' and 'My Folders'. A main navigation menu consists of five buttons: 'Human Resources', 'Student', 'Financial', 'Research', and 'Campus'. Below the navigation menu are two sections: 'Help and support' and 'News'. The 'Help and support' section includes 'Contact' and 'Documentation and training'. The 'News' section includes 'New Chief Investigator Financial Reporting', 'New ANU Insight Portal', and 'Seeking student report testers'. Below the news section are three columns of report packs: 'Recently accessed reports', 'My frequently accessed reports', and 'Recommended reports'. Each column contains a list of report packs with icons and titles.

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 renders or functions, please contact us on [insight@anu.edu.au](mailto:insight@anu.edu.au). For a full list of supported web browsers, please refer to the frequently asked questions in the [FAQ ANU Insight](#) document.

Detailed information on how to navigate all the functionalities available to ANU Insight users is available at: <https://services.anu.edu.au/information-technology/software-systems/insight>.

## Navigating the portal

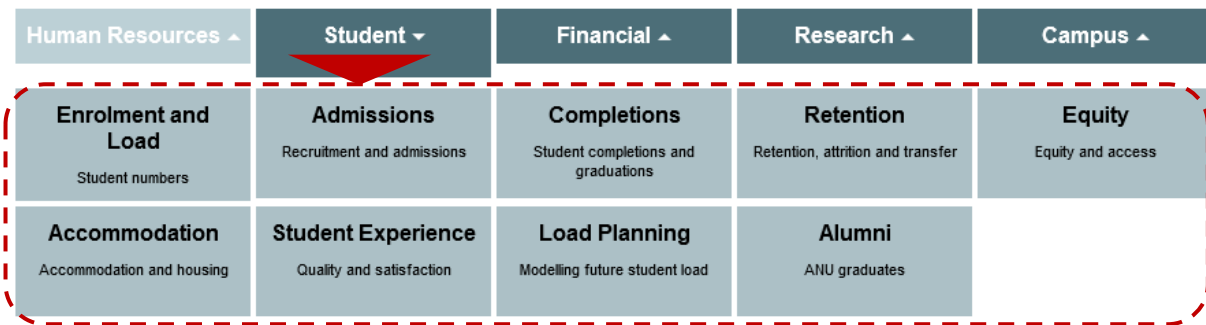
The Navigation menu shown below is how you navigate to report content.



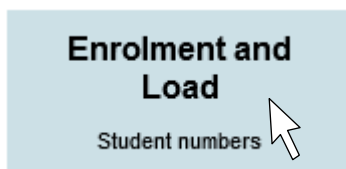
To access the **EFTSL by funding group report** first *left click once* on the Navigation menu on the Student Menu Header as shown below.



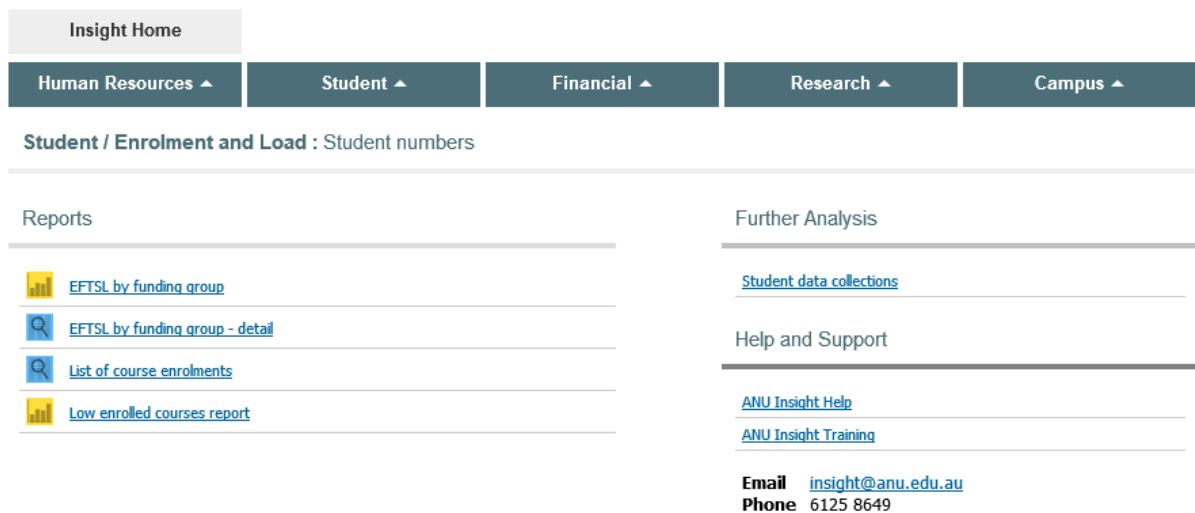
This would then open and display the Student sub menu:



The **EFTSL by funding report** can be found on the Enrolment and Load page. *Left click once* on the sub menu item called **Enrolment and Load** as shown below.

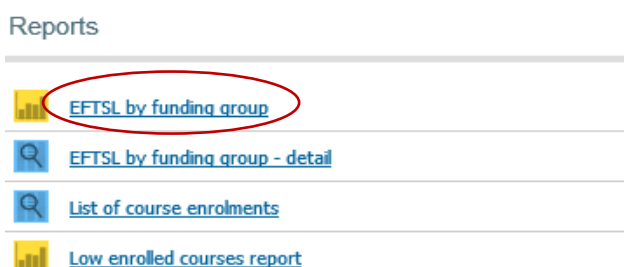


This would then access the **Student/Enrolment and Load Page**, as shown below.



## Running a report

The **EFTSL by funding group report** can be seen at the top of the **Reports** list on the left hand side of the screen.



To run the **EFTSL by funding group report** *left click once* on the report name.

The first thing which will run is the **EFTSL by funding group report prompt** page.

Australian National University

# EFTSL BY FUNDING GROUP

Please select a value for each of the prompts below:

**Academic Year:** \*  
2009  
2010  
2011  
2012  
2013  
2014

[Select all](#) [Deselect all](#)

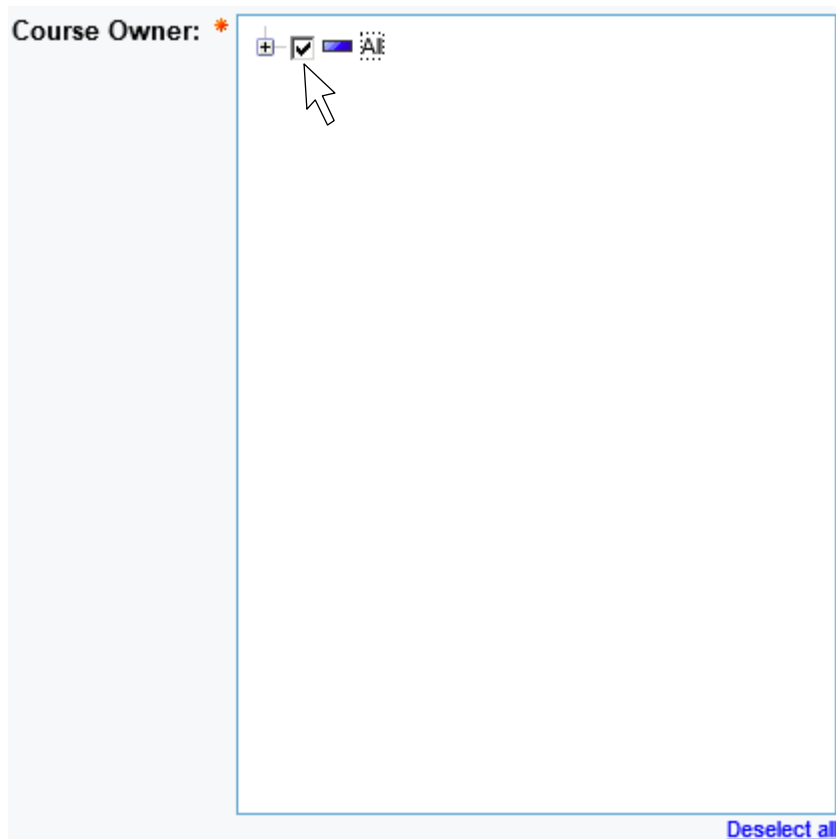
**Course Owner:** \*  
+ - All

[Deselect all](#)

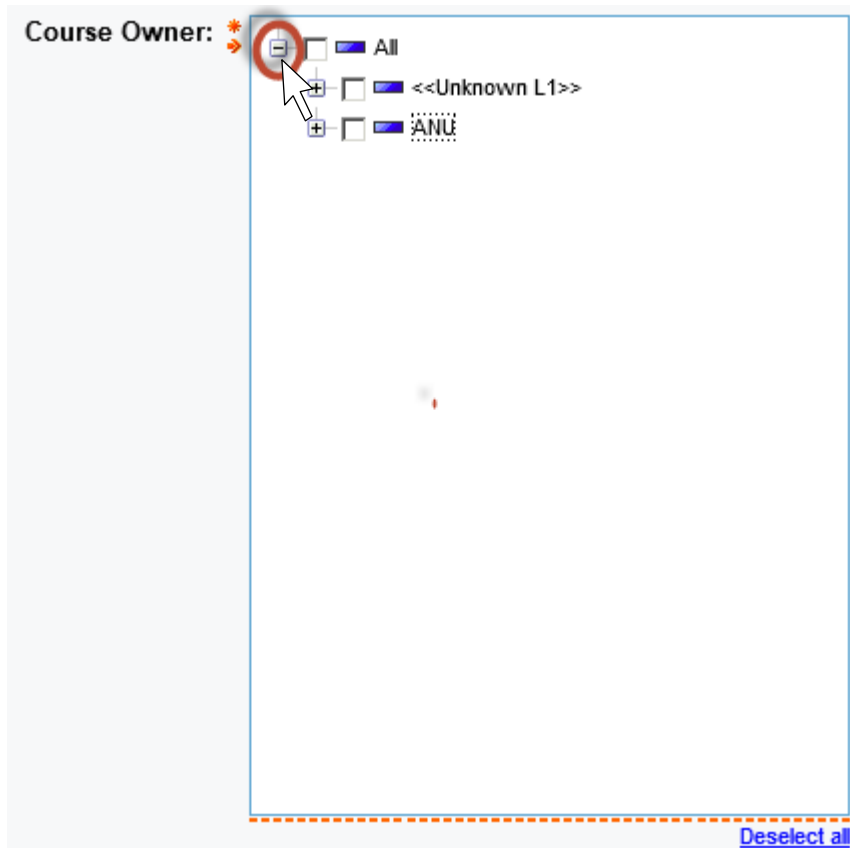
The **EFTSL by funding group report** is run for a specific year and organisational unit. Therefore, a user must tell the report which year and which organisational unit to run the report for. The prompt page is used to do this.

On the **Prompt** page, the user must make two selections before they can move to the next page. The prompts that are mandatory are denoted by a red star located on the left hand side of the prompt box above the red arrow.

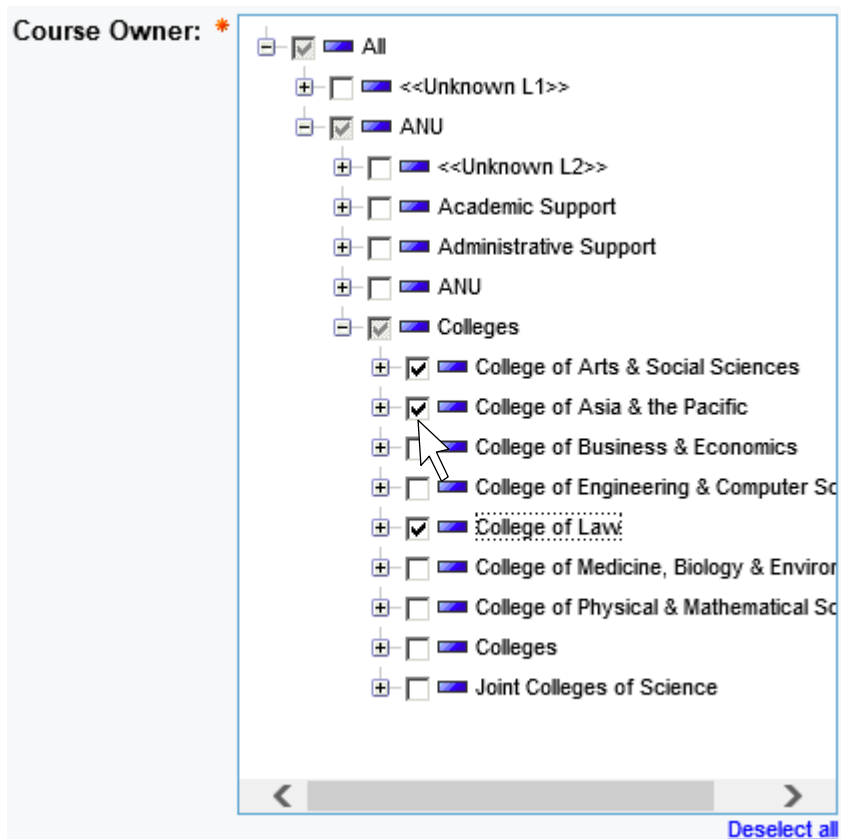
- The first prompt asks the user to select the 'Academic Year'. This is the ANU academic year and consists of all six terms. You may select more than one year by holding down your Ctrl key to view time-series data in the report.
- Next, the user is required to select a 'Course Owner'. This is a hierarchical structure representation of the organisational unit that owns the course. This type of prompt is referred to as a 'tree prompt'. The tree prompt returns a set of members from one or more levels within a single hierarchy. For example, All ANU is at the top of the hierarchy for the course owner organisation structure.
- If you would like to look at the aggregate information for all courses owned by all organisational units, select the 'All' checkbox as shown below:



- You can view organisational units below the 'All' level in the hierarchy and make selections accordingly by *left clicking once* on the plus button to expand the hierarchy, as shown below:



- You may select more than one organisational unit in the hierarchy by *left clicking once* on the checkbox next to the unit you would like to select, as shown below:

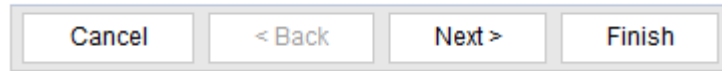


- If you would like to clear your selection, you can uncheck the checkboxes or use the 'deselect all' option located at the bottom of the tree prompt:



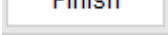
### Navigating the prompt page

At all times at the very bottom of the prompt page, the prompt navigation buttons will show.

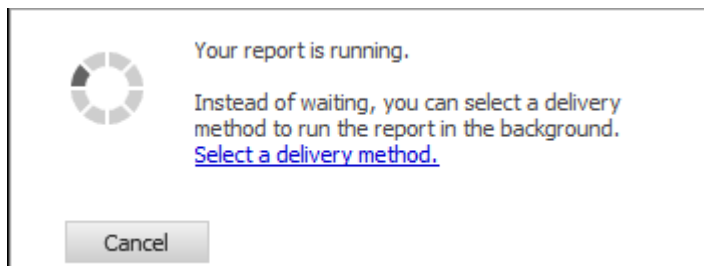


- Cancel** cancels the running of the report and will return you to the portal page
- Back** allows you to go back and change prompt values on a previous prompt page
- Next** allows you to skip a prompt page
- Finish** must be pressed to run the report

#### Important

The *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:



Once the system has retrieved the data, the **EFTSL by funding group report** will be displayed.

### Using the report

Once the report has been generated, you will get a layout such as the one shown below, depending on the selections that you make on the prompt page:

# EFTSL BY FUNDING GROUP

▼ Academic Year(s): 2014

▼ Term: All Terms

▼ Course Owner: College of Arts & Social Sciences, College of Asia & the Pacific

EFTSL			2014
<u>College of Arts &amp; Social Sciences</u>	Domestic	Domestic - Commonwealth Grant Scheme	<a href="#">2,081.1</a>
		Domestic - Fee-paying	<a href="#">184.6</a>
		Domestic - Fee-paying - Overtime	<a href="#">27.7</a>
		Domestic - Research Training Scheme	<a href="#">330.4</a>
		<b>Total(Student Liability Group)</b>	<b>2,623.9</b>
	International	International - Fee-paying	<a href="#">369.5</a>
		<b>Total(Student Liability Group)</b>	<b>369.5</b>
<u>College of Asia &amp; the Pacific</u>	Domestic	Domestic - Commonwealth Grant Scheme	<a href="#">466.4</a>
		Domestic - Fee-paying	<a href="#">474.3</a>
		Domestic - Fee-paying - Overtime	<a href="#">17.1</a>
		Domestic - Research Training Scheme	<a href="#">174.6</a>
		<b>Total(Student Liability Group)</b>	<b>1,132.3</b>
	International	International - Fee-paying	<a href="#">919.5</a>
		<b>Total(Student Liability Group)</b>	<b>919.5</b>
<b>Total(Course Owner)</b>			<b>5,045.2</b>

The fields next to the filter icons at the top of the report denote the selections made on the prompt page as well as the filters applied to the report:

▼ Academic Year(s): 2014

▼ Term: All Terms

▼ Course Owner: College of Arts & Social Sciences, College of Asia & the Pacific

You can explore the data further within the report by drilling up and down on the data hierarchies in the report. These hierarchies that can be drilled up and down on can be easily identified by the underlined text. For example, the hierarchies in the EFTSL by funding group report are course owner, student liability group and academic year, as shown in the screenshot below:



EFTSL			2014
College of Arts & Social Sciences	Domestic	<u>Domestic - Commonwealth Grant Scheme</u>	<u>2,081.1</u>
		<u>Domestic - Fee-paying</u>	<u>184.6</u>
		<u>Domestic - Fee-paying - Overtime</u>	<u>27.7</u>
		<u>Domestic - Research Training Scheme</u>	<u>330.4</u>
		<b>Total(Student Liability Group)</b>	<b>2,623.9</b>
	International	<u>International - Fee-paying</u>	<u>369.5</u>
		<b>Total(Student Liability Group)</b>	<b>369.5</b>
College of Asia & the Pacific	Domestic	<u>Domestic - Commonwealth Grant Scheme</u>	<u>466.4</u>
		<u>Domestic - Fee-paying</u>	<u>474.3</u>
		<u>Domestic - Fee-paying - Overtime</u>	<u>17.1</u>
		<u>Domestic - Research Training Scheme</u>	<u>174.6</u>
		<b>Total(Student Liability Group)</b>	<b>1,132.3</b>
	International	<u>International - Fee-paying</u>	<u>919.5</u>
		<b>Total(Student Liability Group)</b>	<b>919.5</b>
<b>Total(Course Owner)</b>			<b>5,045.2</b>

You can *left click once* on the 'members' of these hierarchies to navigate to the levels below and above them.

To navigate down to the next level, *left click once* on the underlined data item, referred to as the 'member'.



The next level down in the hierarchy, along with the corresponding data, will appear as follows:

EFTSL			2014
College of Arts & Social Sciences	Domestic	<u>Domestic - Commonwealth Grant Scheme</u>	<u>55.2</u>
		<u>Domestic - Fee-paying</u>	<u>0.6</u>
		<u>Domestic - Research Training Scheme</u>	<u>1.9</u>
		<b>Total(Student Liability Group)</b>	<b>57.7</b>
		International	<u>International - Fee-paying</u>
	<b>Total(Student Liability Group)</b>		<b>3.4</b>
	Research School of Humanities & the Arts	Domestic	<u>Domestic - Commonwealth Grant Scheme</u>
<u>Domestic - Fee-paying</u>			<u>143.4</u>
<u>Domestic - Fee-paying - Overtime</u>			<u>15.6</u>
<u>Domestic - Research Training Scheme</u>			<u>200.0</u>
<b>Total(Student Liability Group)</b>			<b>1,444.6</b>
International		<u>International - Fee-paying</u>	<u>194.0</u>
		<b>Total(Student Liability Group)</b>	<b>194.0</b>
Research School of Social Sciences	Domestic	<u>Domestic - Commonwealth Grant Scheme</u>	<u>940.3</u>
		<u>Domestic - Fee-paying</u>	<u>40.7</u>
		<u>Domestic - Fee-paying - Overtime</u>	<u>12.1</u>
		<u>Domestic - Research Training Scheme</u>	<u>128.5</u>
		<b>Total(Student Liability Group)</b>	<b>1,121.6</b>
	International	<u>International - Fee-paying</u>	<u>172.1</u>
		<b>Total(Student Liability Group)</b>	<b>172.1</b>

You can continue to navigate down in the hierarchy until you reach the last level. You will be able to identify the end of the hierarchy when the underline disappears and you can no longer click on the data items to drill down any further.

If you would like to drill up to the previous level in the hierarchy, *right click once* on the data item that you would like to drill up from and *left click once* on the 'drill up' option, as show below:

EFTSL			2014
Research School of Humanities & the Arts	Domestic	Domestic - Commonwealth Grant Scheme	<a href="#">1,085.6</a>
		... - Fee-paying	<a href="#">143.4</a>
		... - Fee-paying - Overtime	<a href="#">15.6</a>
		... - Research Training Scheme	<a href="#">200.4</a>
		... (Student Liability Group)	1,445.0
		... - Fee-paying	<a href="#">194.1</a>
		... (Student Liability Group)	194.1
<b>Total(Course Owner)</b>			<b>1,639.1</b>

You can continue to navigate up in the hierarchy until you reach the highest level. You will be able to identify the highest level of the hierarchy when the 'drill up' option becomes greyed out and you can no longer click on it to drill up any further, as shown below:

EFTSL			2014
All	Domestic	Domestic - Commonwealth Grant Scheme	<a href="#">6,971.4</a>
		... - Fee-paying	<a href="#">2,406.9</a>
		... - Fee-paying - Overtime	<a href="#">132.4</a>
		... - Research Training Scheme	<a href="#">1,203.7</a>
		... (Student Liability Group)	10,714.4
		... - Fee-paying	<a href="#">4,943.8</a>
		... (Student Liability Group)	4,943.8
			15,658.2

### Drill-through functionality

Another important feature of this report is the ability to 'drill-through' to the detail level data. Drill-through access lets users navigate from a source report to a target report to view related data. In the **EFTSL by funding group report** (source report), you can drill-through from the blue hyperlinked cells showing the aggregate EFTSL, to the **EFTSL by funding group - detail report** (target report) to view the breakdown of EFTSL by individual student records.

To drill through to the target report, *left click once* on the blue hyperlinked cells that you would like to see the detail data for, as shown below:

EFTSL			2014
All	Domestic	Domestic - Commonwealth Grant Scheme	<a href="#">6,971.4</a>
		Domestic - Fee-paying	<a href="#">2,406.9</a>
		Domestic - Fee-paying - Overtime	<a href="#">132.4</a>
		Domestic - Research Training Scheme	<a href="#">1,203.7</a>
	Total(Student Liability Group)		10,714.4
International	International - Fee-paying	<a href="#">4,943.8</a>	
	Total(Student Liability Group)		4,943.8
All			15,658.2

Clicking on this cell will open up the target report in a new tab or window in your browser. You can go back to the source report by switching over to the tab or window that the report was open in.

Please note that a maximum of 20 data rows are displayed on one page in the browser by default. A navigation footer, as shown below, is located at the bottom of your browser window, which will allow you to access the other pages of data.



- Top** takes you to the first page of the report
- Page up** allows you to scroll up to the previous page
- Page down** allows you to scroll down to the next page
- Bottom** takes you to the last page of the report

When the 'Top' and 'Page up' button are greyed out, it implies that you are already at the first page of the report and cannot scroll up any further.

When the 'Bottom' and 'Page down' button are greyed out, it implies that you are already at the last page of the report and cannot scroll down any further.

### Save, Print, Annotate & Send

Once the reports are generated, the most common thing users will want to do is Save, Print, Send or Annotate (change) the Report.

- If you wish to Save, Print or Send the report, it is best to export the report to PDF format.
- If you wish to change the Report or use part of the report information, it is best to export the report in Excel Format.
- To export the report into output formats like PDF or Excel you will need to access the *Report Output* button which can be found on the **Report Action Menu** shown below:



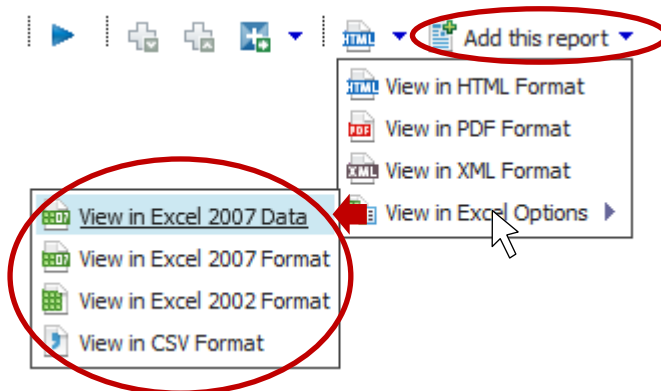
The report action menu can be found on the upper right of the screen under the Report Viewer header.



*Report Output* button will by default look like  but will change to show a PDF or Excel icon depending on the format chosen.

The *Report Output* button allows report users to change the output format of the report. If you *left click once* on the down facing arrow next to the report action button, the output format choice menu will appear.

The report can be run in HTML, PDF, XML or Excel. On most computers there will be 4 alternative Excel output formats.



- PDF is the preferred output format for email, 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-written.
- Excel is the best format if a user wants to make notes or incorporate additional data. There are four options to choose from explained below:

**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.