

Step by Step Instructions

Running the EFTSL by funding group - detail report

The EFTSL by Funding Group – detail Report

- Contains individual student records for those students who are enrolled in a course taught by the selected teaching organisational unit for the selected year and the selected funding group
- Only includes students who have an active course enrolment, i.e. have a status of 'enrolled' recorded against at least one course.

Logging into Insight

The **EFTSL by funding group - detail 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:

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

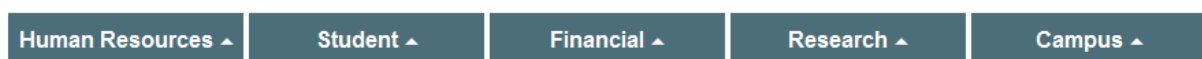
The screenshot shows the ANU Insight portal home page. At the top left is the Australian National University logo and the word 'Insight'. Below this is a navigation bar with 'Insight Home' and 'My Folders'. A main navigation menu consists of five buttons: 'Human Resources', 'Student', 'Financial', 'Research',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

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. 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

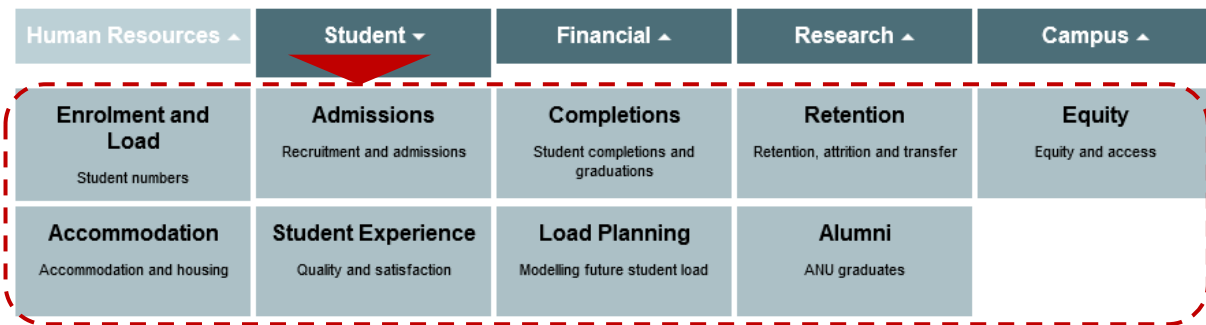
The Navigation menu shown below is how you navigate to report content.



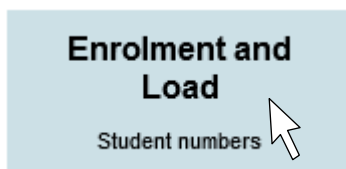
To access the **EFTSL by funding group - detail report** first *left click once* on the Navigation menu on the Student Menu Header as shown below.



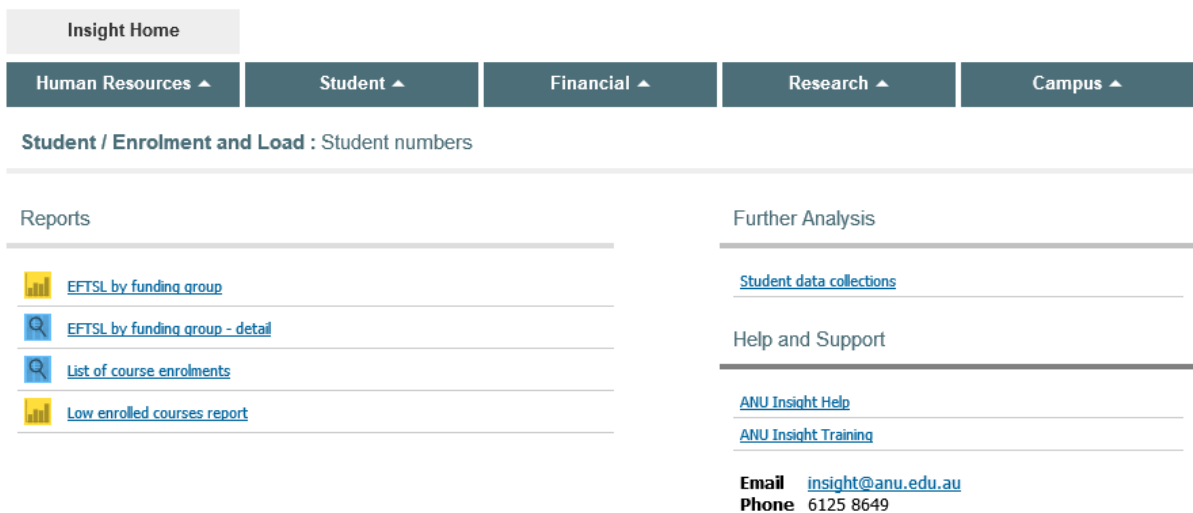
This would then open and display the Student sub menu:



The **EFTSL by funding group – detail 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.

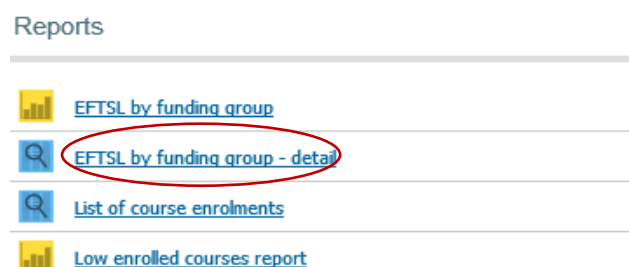


This would then access the **Student/Enrolment and Load Page**, as shown below.



Running a report

The **EFTSL by funding group - detail 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 – detail report** *left click once* on the report name.

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

 **EFTSL BY FUNDING GROUP - DETAIL**

Please select a value for each of the prompts below:

Course Owner: Course Owner L6 Current Description

<<Unknown L6>>
Accounting & Bus Info Systems
ADSRI
Animal Genomics and Evolution
ANU College of Law
ANU Colleges of Science
ANU Medical School
ANU Medical School Admin
ANU National Security College

Term Academic Year: Term Academic Year

2010
2011
2012
2013
2014
2015

Funding Group: Student Liability Group Description

<<Unknown Funding Group>>
<<Unknown Student Liability Group>>
Domestic - Commonwealth Grant Scheme
Domestic - Fee-paying
Domestic - Fee-paying - Overtime
Domestic - Other
Domestic - Research Training Scheme
International - Fee-paying
International - Not Fee-paying

The **EFTSL by funding group – detail report** can be run for a specific organisational unit, year, funding group and/or a combination of any of the above. If no selection is made, the report will run for all students enrolled in all courses owned by any organisational unit for all years.

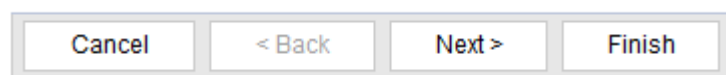
Retrieving such a large data set can take a long time and therefore, it is recommended that a user tell the report which year, funding group and/or organisational unit to run the report for. The prompt page is used to do this.

On the **Prompt** page, the user can make three selections before they 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 a 'Course Owner'. In this prompt box, the lowest level of the organisational structure has been used and therefore it contains every single academic organisational unit. If the intention is to select all course owners, not making any selection in this prompt box will achieve this.
- The next prompt asks the user to select the 'Academic Year'. This is the ANU academic year and consists of all six terms.
- The next prompt asks the user to select the 'Funding Group'. This is derived from the student status code.

Navigating the prompt page

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

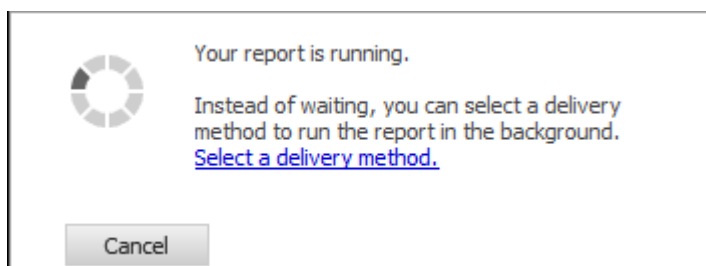


- Cancel** cancels the running of the report and will return you to the portal page
- Back** allows you to go back and change prompt values on a previous prompt page
- Next** allows you to skip a prompt page
- Finish** must be pressed to run the report

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.

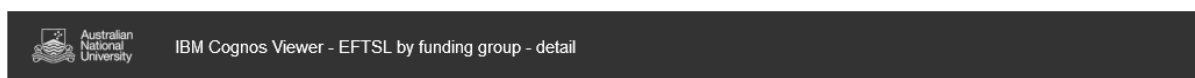
After you press *Finish* you will see a report is running dialog box as shown following:



Once the system has retrieved the data, the **EFTSL by funding group - detail 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 - DETAIL

Academic Year: 2014

Selected Course Owner: Research School of Engineering

Funding group: Domestic - Commonwealth Grant Scheme

Course Owner	Student ID	Full Name	Student Liability Group Description	Student Liability Description	EFTSL
Research School of Engineering	U2548687	Talent,Mishka Alexander	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4528663	Hattley,Andrew Joseph	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4528663	Hattley,Andrew Joseph	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.375
	U4529285	Davis,Amelia Alice	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.375
	U4531935	Wallace,Thomas	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.625
	U4533117	McEvoy,Sean Callam	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.250
	U4665131	Jones,Neil	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4667984	Lieu,Anthony	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.125
	U4669040	Bond,Amanda Jane	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - With discount - From 2005	0.000
	U4673000	Denny,Michael Christopher	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - With discount - From 2005	0.000
	U4673277	Robinson,Joanna Claire	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4673327	Tapper,Christopher John	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.625
	U4675308	Woolley,Daniel	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4681553	Blessington,Louise	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - No discount - From 2005	0.125
	U4685133	Hall,Edmund Greer	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - No discount - From 2005	0.125
	U4843494	Jayawardana,Delapolage Haridra Koshali	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.750
	U4843621	Griffin,Benjamin Tony	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.875
	U4844534	Layton,Michael James	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Liable - Deferred - From 2005	0.750
	U4844751	Byrne,Liam Gabriel	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000
	U4844763	van der Spek,Christopher William	Domestic - Commonwealth Grant Scheme	Domestic - Contribution Exempt - Work experience - From 2005	0.000

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: 2014

Selected Course Owner: Research School of Engineering

Funding group: Domestic - Commonwealth Grant Scheme

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.

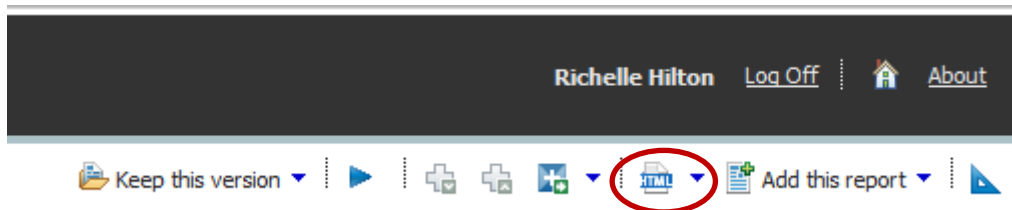
Save, Print, Annotate & Send

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:



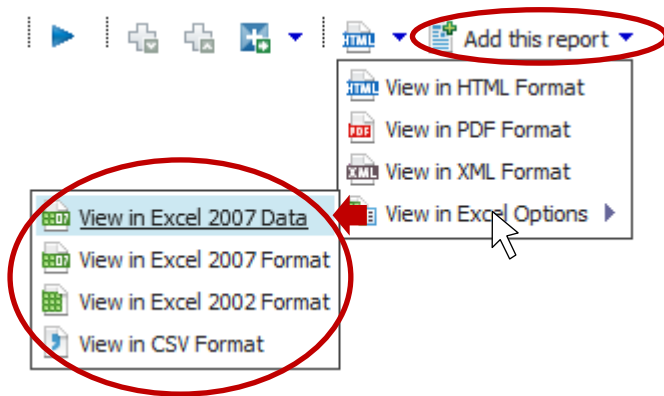
The report action menu can be found on the upper right of the screen under the Report Viewer header.



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.