

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/>

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 screenshot displays the ANU Insight portal home page. On the left is a dark sidebar with navigation options: Home, Search, My content, Team content, and Recent. The main content area is titled 'Insight Home' and includes a top navigation bar with 'ANU Insight' and 'ANU Portal'. Below this is a grid of five categories: Student, Research, Financial, Human Resources, and Campus, each with a list of links. A 'News' section follows, containing three items with dates and titles. At the bottom, there are four columns: 'Recently accessed' (with search icons), 'Frequently accessed' (with bar chart icons), 'Recommended reports' (with bar chart icons), and 'My Insight' (with links to help and training). An 'Insight Service Desk' section at the bottom right provides contact information: Email: insight@anu.edu.au and Phone: 6125 8649.

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.

Student	Research	Financial	Human Resources	Campus
Enrolment and load	Grants	Financial reporting	WHS	IT
Student experience	Publications	CI financial reporting	Academic activity	Functions on Campus
Load planning (TM1)	Publication validation	Travel reporting	eForms	
eForms	CPA		PCA	

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:

Student	Research	Financial
Enrolment and load	Grants	Financial reporting
Student experience	Publications	CI financial reporting
Load planning (TM1)	Publication validation	Travel reporting
eForms	CPA	

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

Student	Research	Financial	Human Resources	Campus
Enrolment and load	Grants	Financial reporting	WHS	IT
Student experience	Publications	CI financial reporting	Academic activity	Functions on Campus
Load planning (TM1)	Publication validation	Travel reporting	eForms	
eForms	CPA		PCA	

Report packs	Exception reports
<ul style="list-style-type: none"> Portfolio report pack Subproject report pack Project report pack 	<ul style="list-style-type: none"> Exception Report Exception dashboard: Issue type and count crosstab for colleges (printer-friendly) Exception dashboard: Issue type and count crosstab for schools (printer-friendly) Exception dashboard: Q account issue type and count column chart (printer-friendly) Exception dashboard: S account issue type and count column chart (printer-friendly)

Help and Support	Further Analysis
<ul style="list-style-type: none"> CI Reporting Help ANU Insight Help ANU Insight Training <p>Email insight@anu.edu.au Phone 6125 8649</p>	<ul style="list-style-type: none"> Finance and Business Services

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

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

Student	Research	Financial	Human Resources	Campus
Enrolment and load	Grants	Financial reporting	WHS	IT
Student experience	Publications	CI financial reporting	Academic activity	Functions on Campus
Load planning (TMI)	Publication validation	Travel reporting	eForms	
eForms	CPA		PCA	

3 The Breadcrumb reference

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

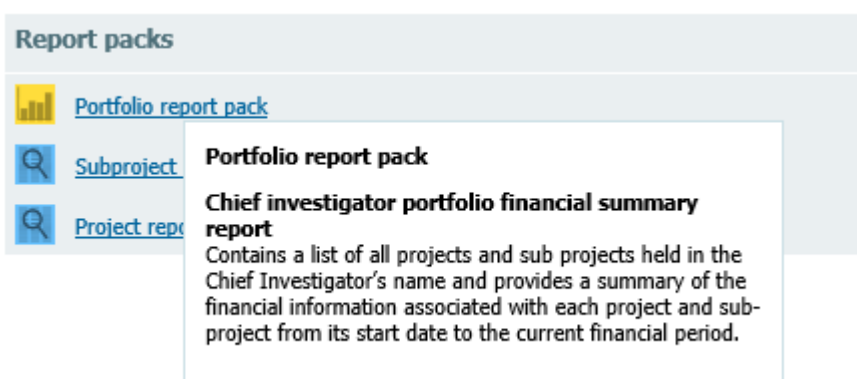
The Breadcrumb reference is designed to provide you with a trail of ‘breadcrumbs’ to help you understand where you have navigated to and from.

The Reports List



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.



This description will provide some basic details on the report without the need to open and run the report.

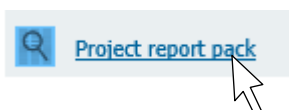
If the report description displays the term (*Secured*) after the report title this means additional security access is required before you can run the report. If you believe you require access to this report please contact the ANU Insight Service Desk via email on insight@anu.edu.au or phone on +61 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 General Insight information web page at <https://services.anu.edu.au/information-technology/software-systems/insight/general-insight-information>

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

Further Analysis

[Finance and Business Services](#)

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

Help and Support

[ANU Insight Help](#)

[ANU Insight Training](#)

Email insight@anu.edu.au

Phone 6125 8649

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

My Insight

[ANU Insight Help](#)
[ANU Insight Training](#)

Insight Service Desk

Email: insight@anu.edu.au
 Phone: 6125 8649

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

News		
03/10/2017	ANU Insight has been upgraded	The ANU Insight portal has gotten a new look
12/09/2017	New income statement report	A new income statement report is available
12/09/2017	Research costing and pricing reports	Research costing and pricing reports have been released

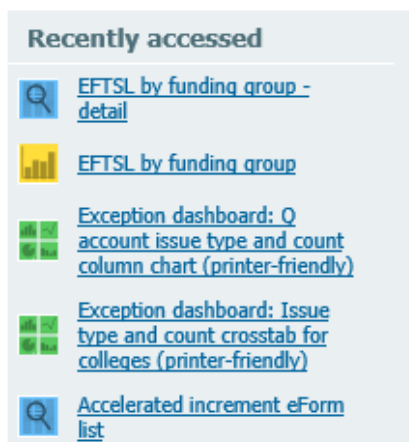
The *News* section provides a quick snapshot of important information for our users. Common news items you should expect to see advertised here include:

- 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.



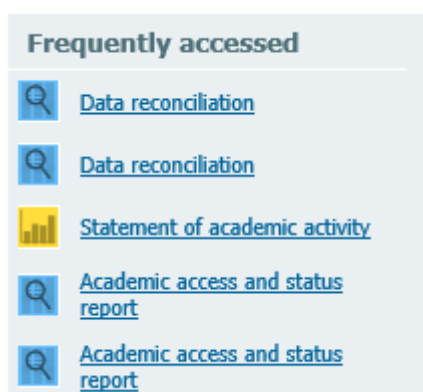
You can run the reports by *clicking once* on the name as in other parts of the ANU Insight portal.

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.



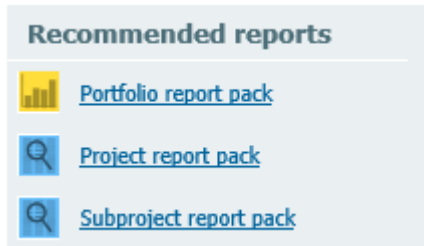
You can run the reports by *clicking once* on the name as in other parts of the ANU Insight portal.

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.

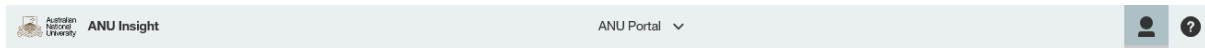


You can run the reports by *clicking once* on the name as in other parts of the ANU Insight portal.

If you do not have any *Recommended Reports* the following message will display:

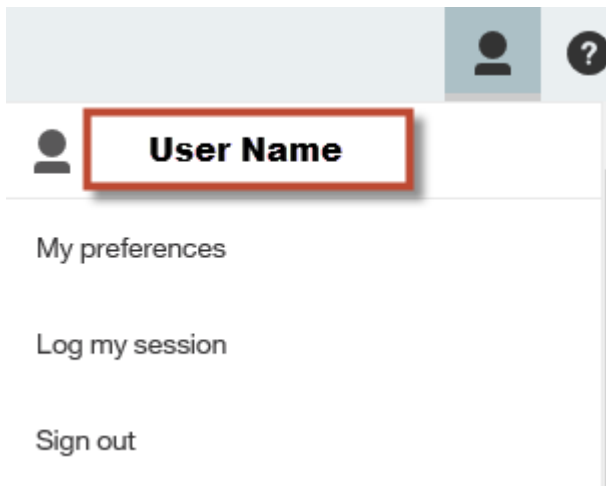
You don't have any personalised recommendations yet. Watch this space!

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

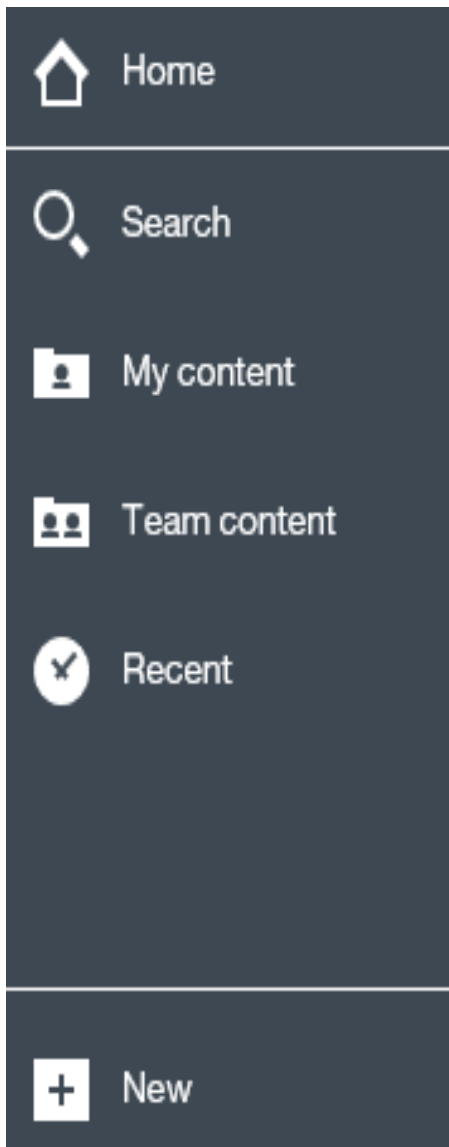


The first section provides the name of the user logged into the system and provides a link to allow a user to log off.

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.

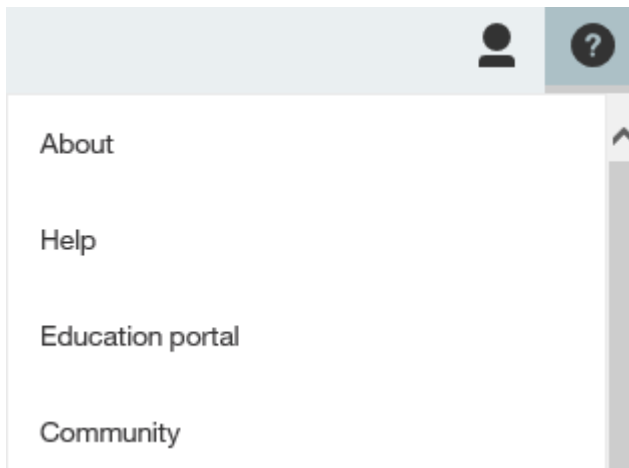
Recent

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.

Help 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 General Insight information web page at <https://services.anu.edu.au/information-technology/software-systems/insight/general-insight-information> rather than using this generic assistance.