University Reporting Dashboard

User Guide

The University Reporting Dashboard is a repository of reports that can be run across the institution. The data is secured by organization so that users only see data that pertains to the organizational units to which they have been granted access.

Mozilla Firefox is the preferred browser for accessing reports on the dashboard. Other browsers have known issues and reports may not render properly or at all.
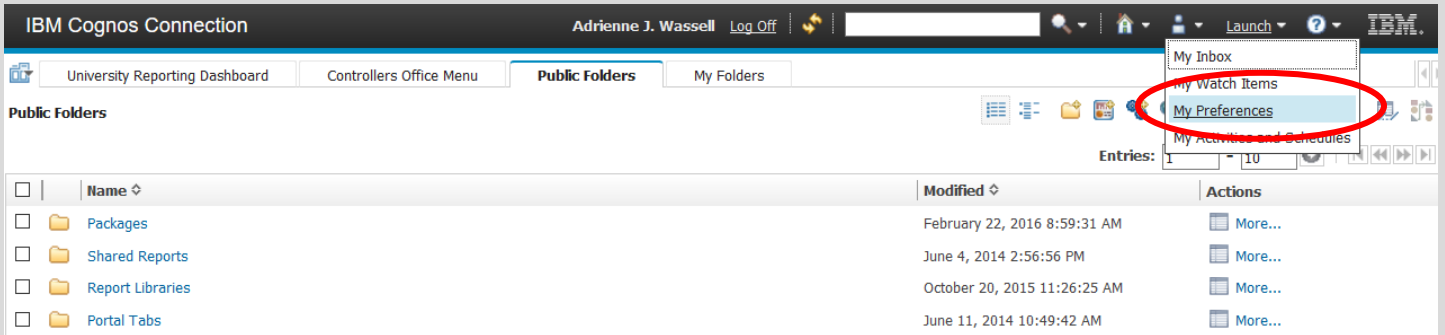

Use the Finance Access Request Form to request access to the dashboard or to modify the organizations, funds and reports to which you have access.

The University Reporting Dashboard is available through the Cognos icon on the top right of the myIIT portal
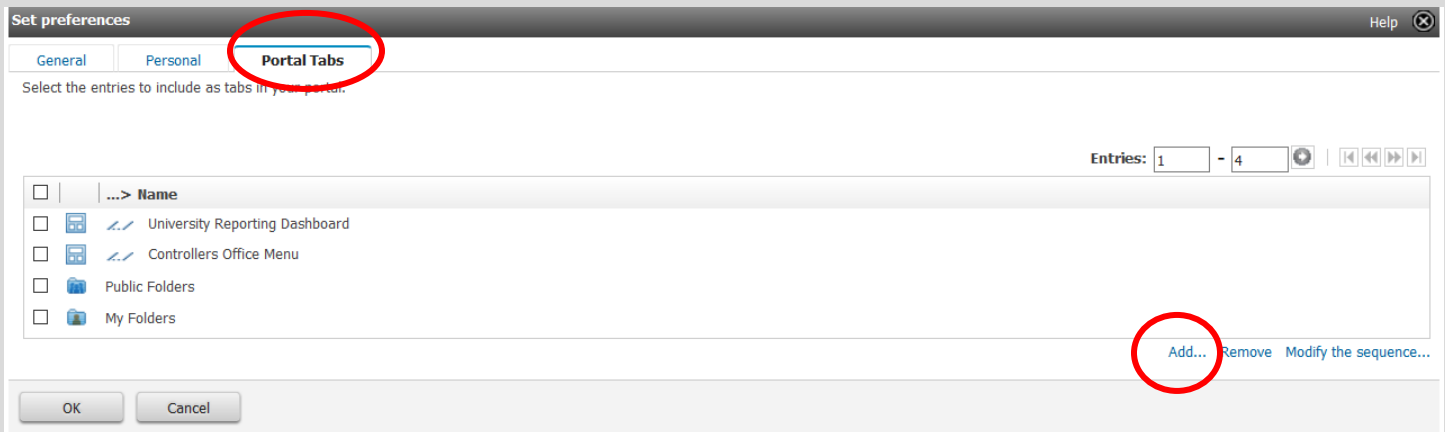
First Time Use Steps to Configure Dashboard

1. Select My Preferences on the main menu

2. Click the Portal Tabs tab and click Add (bottom right)

3. Navigate to the menu -Public Folders->Finance Dashboard and select University Reporting Dashboard

Use the yellow arrow to select the entry and click OK
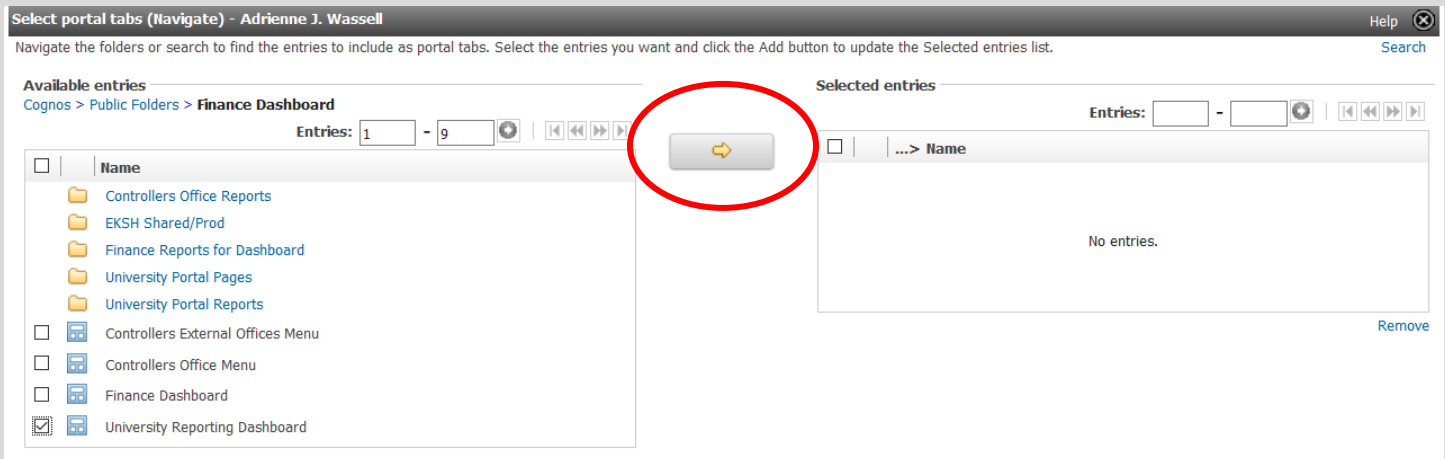
Select Modify the Sequence

Select the University Reporting Dashboard and click "Up" until it is at the top. Click OK to exit

Close the Preferences Window

The University Reporting Dashboard will now appear each time you log in.

Types of Reports

Finance Operating Reports

These non-research reports provide information about Year-To-Date budgets, actuals and transaction-level information.

Research Reports

The Research Reports library contains reports related to research grants. Use these reports to see high-level information about grant budget and actual activity and to drill down into more detailed transaction and payroll level data. Your access is determined by grant and organization. **If a transaction is erroneously recorded in an organization code belonging to another unit you may not see that transaction in your data. Please contact Grant and Contract Accounting to resolve any discrepancies.**

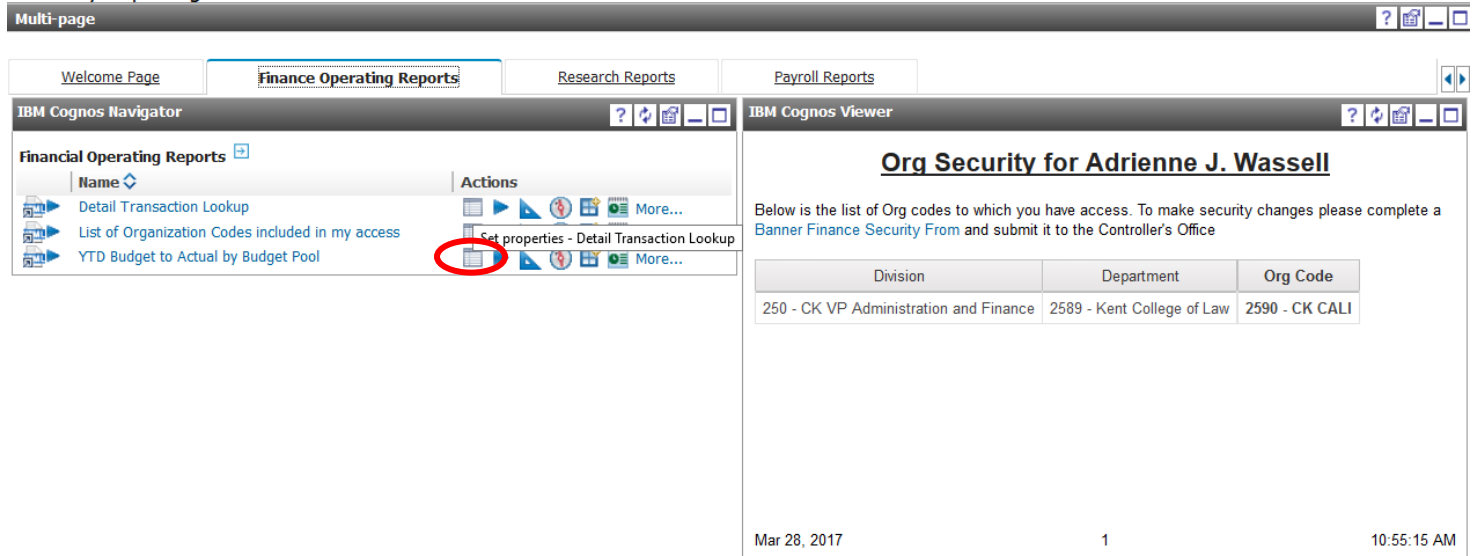### Payroll Reports

This section contains labor distribution and payroll transaction detail reports. You will only be authorized to run these reports if your finance security form included access to payroll detail information.

Understanding Individual Reports

The report library will change over time. To read about a specific report, click the Set Properties icon and review the Report Description.

Running Reports

There are several ways to run reports

1. **To view the report on screen, click the report name.**

University Reporting Dashboard

Multi-page

| Welcome Page | **Finance Operating Reports** | Research Reports |

IBM Cognos Navigator

Financial Operating Reports

Name ◇	Actions
Detail Transaction Lookup	More...
List of Organization Codes included in my access	More...
YTD Budget to Actual by Budget Pool	More...

Once you are viewing the report on-screen, you can choose to export it into excel or PDF by clicking the export dropdown on the top right of the screen

Keep this version ▼ | ▶ | 🎛 | 🎛 📧 ▼ | 📝 Add this report ▼

View in HTML Format
View in PDF Format
View in XML Format
View in Excel Options ▶

YTD Budget to Actual by Account Pool - Fiscal Year 2017

FUND	ORGANIZATION_CODE	ACCOUNT	ACCOUNT_DESC	Account Pool	Pool Name	Budget	YTD Activity	Encumbrances	Rem
		6215	Professional Exempt Salaries	6200	Other Salaries	401,369.00	289,847.67	0.00	
		6220	Administrative Non Exempt Salaries			0.00	37,500.06	0.00	-37,500.06
		6200 - Total				401,369.00	327,347.73	0.00	74,021.27
		6307	Student Salaries Non FWS	6300	PT Salaries	5,000.00	0.00	0.00	5,000.00
		6300 - Total				5,000.00	0.00	0.00	5,000.00
		6508	Other Employee benefits	6500	Benefits	92,315.00	0.00	0.00	92,315.00
		6514	Benefits			0.00	61,253.15	0.00	-61,253.15
		6500 - Total				92,315.00	61,253.15	0.00	31,061.85
		7150	Supplies	7145	Supplies and Services	2,000.00	0.00	0.00	2,000.00
		7151	Office Supplies			0.00	140.40	0.00	-140.40
		7153	Paper Supplies			0.00	34.63	0.00	-34.63
		7170	Mailing Service Expense			4,900.00	0.00	0.00	4,900.00
		7171	Postage			0.00	4,027.55	0.00	-4,027.55
		7172	Shipping			0.00	135.29	0.00	-135.29
		7180	Telecommunications Pool			500.00	0.00	0.00	500.00

Excel Options

Excel 2007 Data: Export data with no formatting. Use if you plan to manipulate the data further (sort, filter etc).
Excel 2007 Format: Export the report with formatting (colors, merged cells etc). Use for presentation style.
Excel 2002 Format: To facilitate compatibility with earlier versions of Excel.
CSV: Raw data with no formatting. Column headers may be renamed.

2. To email the report to yourself, click the Play button and select from options

University Reporting Dashboard

Multi-page

| Welcome Page | Finance Operating Reports | Research Reports |

IBM Cognos Navigator

Financial Operating Reports

Name ◇	Actions
Detail Transaction Lookup	▤ ▶ ◣ ⊙ ⊞ ⊟ More...
List of Organization Codes included in my access	▤ ▶ ◣ ⊙ ⊞ ⊟ More...
YTD Budget to Actual by Budget Pool	▤ ▶ ◣ ⊙ ⊞ ⊟ More...

Select Format (HTML-on screen, Excel, CSV or PDF

Select Delivery (view report now, save report, print report or **Send me the report by email (MOST COMMON).**

File   Edit   View   History   Bookmarks   Tools   Help

MyIIT | University Reporting Dashboar... | Run with options - YTD Budge...   +

https://cognos10.iit.edu/cognosprod/cgi-bin/cognosisapi.dll?b_action=xts.run&m=portal/runWithOptions/re   120%   C   Q Search

Corporate & Institutio...   Cognos Test   Log In to Canvas   Banner Test   Banner Dev   Cognos Dev

Run with options - YTD Budget to Actual by Account Pool (Budget Checking)   Help ⊗

Select how you want to run and receive your report.

Format:
HTML

To specify a time to run the report, or for additional formats, languages, or delivery options, use advanced options.

Accessibility:
☐ Enable accessibility support

Language:
English (United States)

Delivery:
◉ View the report now
○ Save the report
○ Print the report:
   Printer location:
   [   ]   Select a printer...
○ Send me the report by email

Prompt values:
No values saved
☑ Prompt for values

Run   Cancel

3. To Email the report to someone else or a group of people used the Advanced Options

Once you check Send the report by email, you can visit the Advanced Options section (top right) and select Edit Options under Delivery to configure an email to accompany your report

○ View the report now
● Run in the background:
    ● Now
    ○ Later:

       Mar 28, 2017

       11 : 16 AM

Options

Formats:
☑ HTML
    Number of rows per Web page:
    20
    ☑ Enable selection-based interactivity
☐ PDF
    No options saved
    Set...
☐ Excel 2007
☐ Excel 2007 Data
☐ Excel 2002
☐ Delimited text (CSV)
☐ XML

Accessibility:
☐ Enable accessibility support

Languages:
English (United States) Select the languages...

Prompt values

No values saved
☑ Prompt for values

Delivery:
Select at least one delivery method. For burst reports, the email recipients are determined by the burst specification.
☐ Save:
    ● Save the report
    ○ Save the report as a report view Edit the options...
       ✎ Report View of YTD Budget to Actual by Account Pool (Budget Checking)
☐ Print the report
    Printer location:

                                 Select a printer...
☑ Send the report by email Edit the options...
    Adrienne J. Wassell (awassell)

Run   Cancel

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.
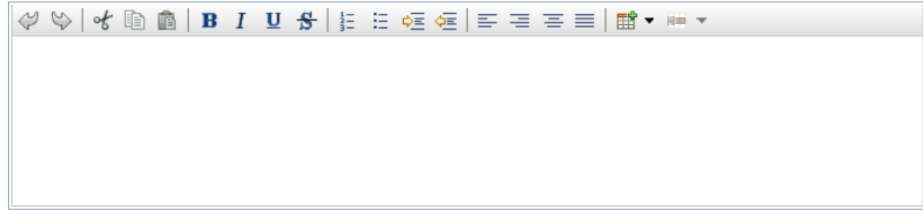
To:

Adrienne J. Wassell (awassell);

Cc:

Select the recipients...   Show Bcc

Subject:

Report: YTD Budget to Actual by Account Pool (Budget Checking)

Body: Change to plain text »

☐ Include a link to the report
☑ Attach the report

OK   Cancel