

**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.

University Reporting Dashboard

The screenshot shows a web browser window titled "Multi-page" with the URL "http://myiit.edu/ReportingDashboard". The page has a navigation bar with tabs for "Welcome Page", "Finance Operating Reports", "Research Reports", and "Payroll Reports". The main content area features the "Illinois Institute of Technology REPORTING DASHBOARD" header. On the left, a red box titled "REPORT CATEGORIES" lists "FINANCIAL OPERATIONS REPORTS: Fund Type 10 (Unrestricted) and 20 (Donor-restricted)" and "RESEARCH REPORTS: Fund Type 30 (Grant and Contract)". On the right, an "INFORMATION" box provides instructions on how to read reports and request access, listing contact emails: "Financial Operations Reports: Controller@iit.edu" and "Research Reports: nptak@iit.edu".

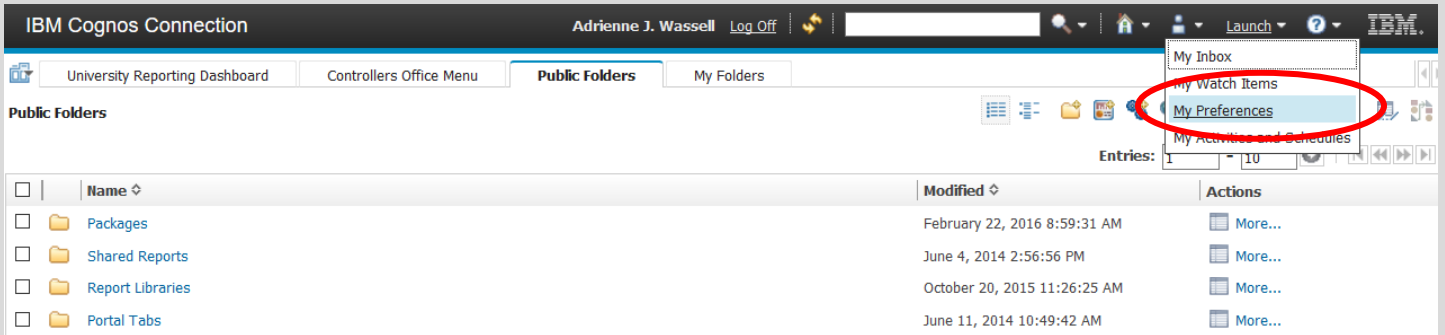
Use the [Finance Access Request Form](#) to request access to the dashboard or to modify the organizations, funds and reports to which you have access.

The University Reporting Dashboard is available through the Cognos icon on the top right of the myIIT portal

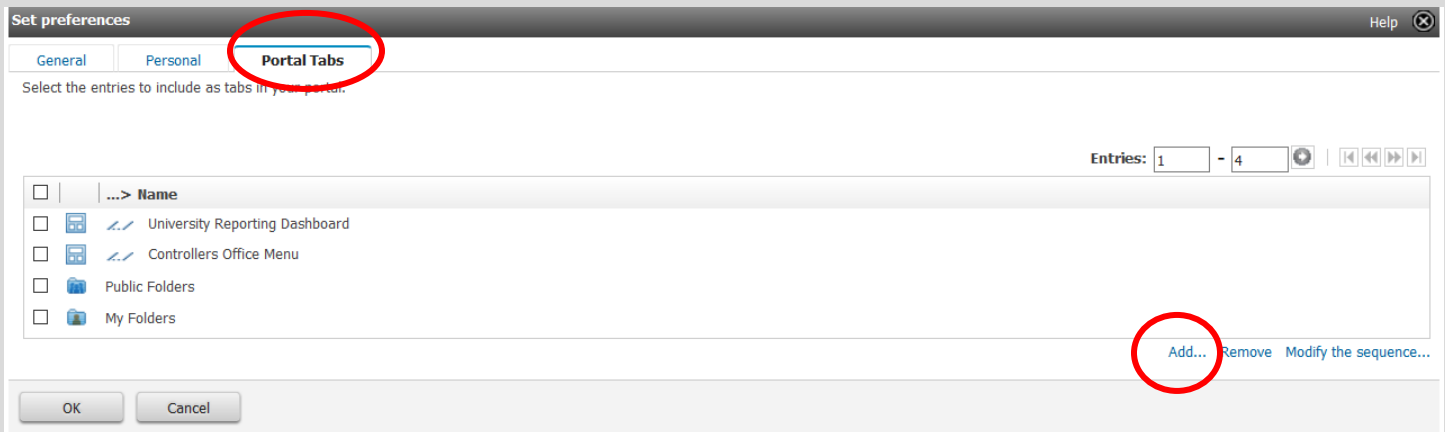
The screenshot shows the myIIT portal navigation bar. At the top, it says "ILLINOIS INSTITUTE OF TECHNOLOGY" and "myiit". Below this is a row of icons for various services: "My Account Content Layout", "Welcome Adrienne J. Wassell You are currently logged in.", "Manage My Account", "VCL", "Google Apps for Students", "Google Apps for Faculty and Staff", "Blackboard", "HawkLink", "PeopleAdmin 5.8", "PeopleAdmin Performance and Recruiting", "ots support", "library e-resources", "cognos 10" (circled in red), "Presidential Dashboard", "Center for Disability Resources", and "Logout". Below the navigation bar is a horizontal menu with tabs for "Welcome", "Academics", "Student Life", "Finances", "Athletics", "Work", "Banner Finance", "Library", "Research", "My Stuff", and "Training and Support". The date "March 2" is displayed on the right. Below the navigation bar are three main content areas: "IIT Events" with a link to "View the University Calendar Here", "IIT Today" with news items like "Ludwig Mies van der Rohe's 131st Birthday Party to Feature Architects Tod Williams and Billie Tsien" and "Residential Express Now Available in The Commons", and "Public Safety" with "EMERGENCY PHONE NUMBERS" for Mies (Main) Campus, Downtown Campus, Moffett Campus, and Rice Campus.

First Time Use Steps to Configure Dashboard

1. Select My Preferences on the main menu

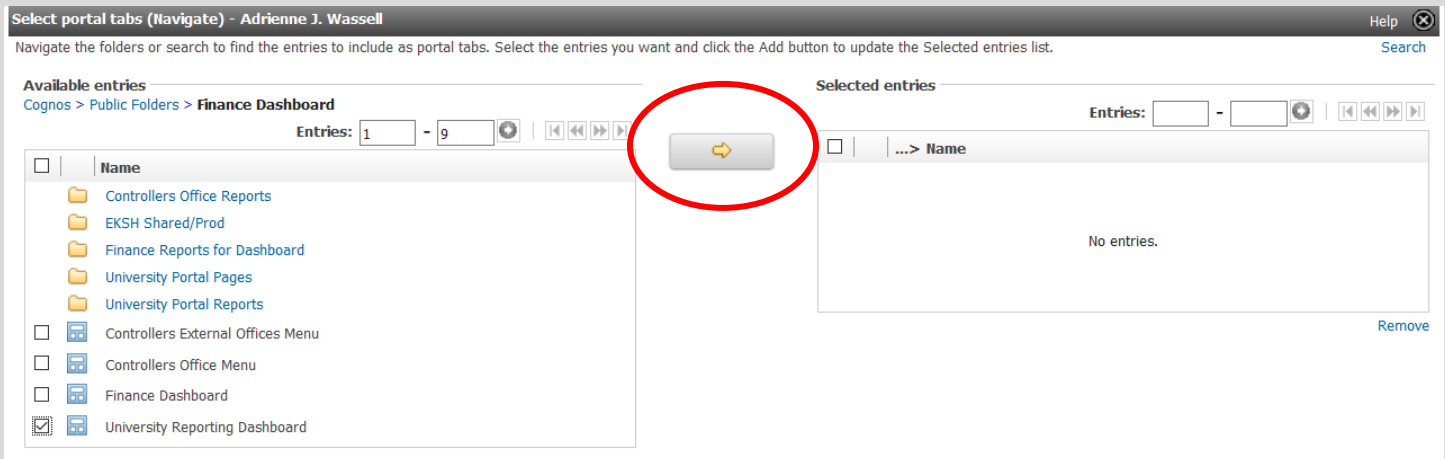


2. Click the Portal Tabs tab and click Add (bottom right)



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

Set preferences Help

General Personal **Portal Tabs**

Select the entries to include as tabs in your portal.

Entries: 1 - 4

<input type="checkbox"/>	...	Name
<input type="checkbox"/>		University Reporting Dashboard
<input type="checkbox"/>		Controllers Office Menu
<input type="checkbox"/>		Public Folders
<input type="checkbox"/>		My Folders

Add... Remove **Modify the sequence...**

OK Cancel

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

Modify the sequence of tabs Help

Specify the order you want your tabs to follow.

Tabs:

Controllers Office Menu
Public Folders
My Folders
University Reporting Dashboard
Finance Dashboard

Up Down To top To bottom

OK Cancel

Close the Preferences Window

Set preferences Help

General Personal **Portal Tabs**

Select the entries to include as tabs in your portal.

Entries: 1 - 5

<input type="checkbox"/>	...	Name
<input type="checkbox"/>		University Reporting Dashboard
<input type="checkbox"/>		Controllers Office Menu
<input type="checkbox"/>		Public Folders
<input type="checkbox"/>		My Folders
<input type="checkbox"/>		Finance Dashboard

Add... Remove Modify the sequence...

OK Cancel

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.**

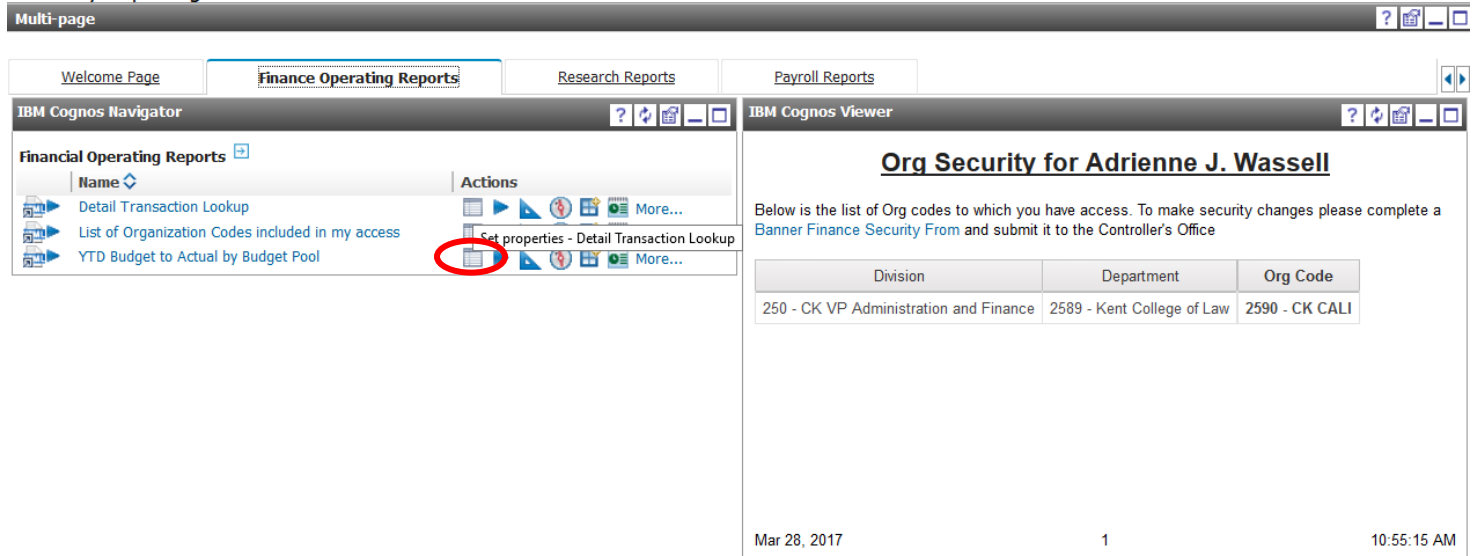
Payroll Reports

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.

University Reporting Dashboard



Multi-page

Welcome Page **Finance Operating Reports** Research Reports Payroll 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...

Set properties - Detail Transaction Lookup

IBM Cognos Viewer

Org Security for Adrienne J. Wassell

Below is the list of Org codes to which you have access. To make security changes please complete a Banner Finance Security Form and submit it to the Controller's Office

Division	Department	Org Code
250 - CK VP Administration and Finance	2589 - Kent College of Law	2590 - CK CALI

Mar 28, 2017 1 10:55:15 AM

Running Reports

There are several ways to run reports

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

University Reporting Dashboard

The screenshot shows the University Reporting Dashboard with three tabs: 'Welcome Page', 'Finance Operating Reports', and 'Research Reports'. The 'Finance Operating Reports' tab is active. Below the tabs is the 'IBM Cognos Navigator' header with a search icon and a refresh icon. The main content area is titled 'Financial Operating Reports' and contains a table with two columns: 'Name' and 'Actions'. The 'Name' column lists three reports: 'Detail Transaction Lookup', 'List of Organization Codes included in my access', and 'YTD Budget to Actual by Budget Pool'. The 'YTD Budget to Actual by Budget Pool' report is circled in red. The 'Actions' column for each report contains icons for 'More...', 'Print', and 'Export'.

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

The screenshot shows the 'YTD Budget to Actual by Account Pool - Fiscal Year 2017' report. The report is a table with columns: FUND, ORGANIZATION_CODE, ACCOUNT, ACCOUNT_DESC, Account Pool, Pool Name, Budget, YTD Activity, Encumbrances, and Rem. The table is filtered by 'FUND' and shows data for various account pools. The 'View in Excel Options' menu item is circled in red.

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

The screenshot shows the 'University Reporting Dashboard' with a 'Multi-page' header. Below the header are three tabs: 'Welcome Page', 'Finance Operating Reports' (which is active), and 'Research Reports'. Underneath is the 'IBM Cognos Navigator' section. The main content area is titled 'Financial Operating Reports' and contains a table with two columns: 'Name' and 'Actions'. The table lists three reports: 'Detail Transaction Lookup', 'List of Organization Codes included in my access', and 'YTD Budget to Actual by Budget Pool'. The 'YTD Budget to Actual by Budget Pool' report is highlighted with a dashed border. In the 'Actions' column for this report, a play button icon is circled in red.

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)**).

The screenshot shows a web browser window displaying the 'Run with options - YTD Budget to Actual by Account Pool (Budget Checking)' dialog box. The browser's address bar shows the URL: https://cognos10.iit.edu/cognosprod/cgi-bin/cognosisapi.dll?b_action=xts.run&m=portal/runWithOptions/re. The dialog box has a title bar that says 'Run with options - YTD Budget to Actual by Account Pool (Budget Checking)'. Below the title bar, there is a message: 'Select how you want to run and receive your report.' The dialog box contains several sections: 'Format:' with a dropdown menu set to 'HTML'; 'Accessibility:' with a checkbox 'Enable accessibility support' which is unchecked; 'Language:' with a dropdown menu set to 'English (United States)'; 'Delivery:' with four radio button options: 'View the report now' (selected), 'Save the report', 'Print the report:', and 'Send me the report by email' (circled in red). Below the 'Send me the report by email' option is a text input field for 'Printer location:' with a 'Select a printer...' button. At the bottom of the dialog box, there are two buttons: 'Run' and 'Cancel'. There is also a 'Prompt values:' section at the bottom with a checkbox 'Prompt for values' which is checked.

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:

Options

Formats:

HTML
 Number of rows per Web page:
 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:

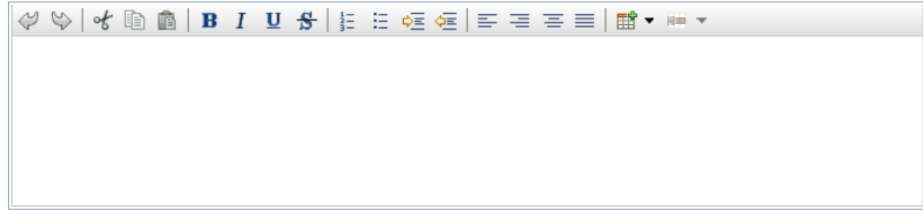
[Select the recipients...](#) [Show Bcc](#)

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