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.

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.

1. 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.

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)).
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.

- **Options**
  - Formats:
    - HTML
    - PDF
    - 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. Wossell (awossell)
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:

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

Body:

☐ Include a link to the report
☐ Attach the report

[Email editor interface]