Insight Reporting Service

Accessing Reports

Business Process Guide

Direct questions to Financial Accounting and Reporting, x5103
Access Insight Reporting

Internet Explorer is the preferred browser, however, Chrome, Safari and Firefox can also be used.

- Type //Insight in the browser URL and press the Enter key.
- Enter Username and Password on the Login page.
- Click OK.

*Note: Username and Password are the same as the Domain.*
Access Insight Reporting (cont.)

- Open the **Financials** folder.

- Click the **Financials Reports** to open the folder.

- Click the financial report you would like to process.
Access Insight Reporting (cont.)

- Click the report to be processed.
Setting Report Parameters

- Once a report is open, use the down arrow to open the box and select parameters for each category. The categories will vary with the report selected.

Note: When setting the Deptid parameter there are two options:

- Select from the list;  
  OR
- Select N/A and select the Deptid.
Processing a Report & Accessing Results

Process a Report
• Once the parameters have been selected, click the View Report button to process the report.

Results
• The first page of the results will display below the parameters.
• The page number and number of pages in the report are listed on the left side of the tool bar.
• Use the arrows to move through the report.
**Searching the Results**

Use the box to search the report for specific information.

Type specific information in the box and click **Find**.

If the information is contained in the report it will be located and highlighted. Click **Next** to find other occurrences.
Exporting to Excel

• Click the down arrow in the **Save As** box.

• Select **Excel**.

• Click **Open**.
Exporting to Excel (cont.)

- An Excel document will open containing the information from the Insight report.
Printing a Report

• Do not use the printer icon in Insight to print the document.

• Use the **File** button on the Excel Worksheet to access the print function.

• Select **Print**.