Business Reporting Portal

We have moved your business reports from PlanIT to the new business reporting portal.

You will now access your reports at http://insight.cpit.ac.nz/reports/Pages/Default.aspx

A refresher on what the reports are for:

These reports are part of the CPIT performance monitoring framework and provide a whole of organisation view of performance to budget.

Ultimately these reports are about tracking resource utilisation:

- Revenue
- Staffing expenditure/commitment
- Enrolment activity
- OPEX (Operating Expenditure)

How can the information help me?

- Look for any variances to budget – particularly the red ones which show you are spending more than you budgeted.
- Follow up on the variances and make sure you understand them. Don't necessarily ignore the green ones – work out what is working for you in that area and see if you can't apply that elsewhere.
- Pro-actively manage your spend – if you're only at 80% of your student numbers plan to spend only 80% of your budget.

What has changed?

The information is still the same. Only how you access it has changed. There are also a couple of little tricks to navigating your way through the new portal. These are outlined in more detail in the following pages.

Why the change?

With the move to a Microsoft centric infrastructure in 2011, the PlanIt implementation was no longer necessary. PlanIt did not easily integrate with the reporting backend systems and thus some features could not be leveraged and some that were e.g. printing, did not work well.

The new reporting portal is based on Microsoft SharePoint which has built-in integration with the backend, Microsoft based, reporting systems. This provides much more flexibility and reliability in the reports, their presentation and things like printing and export to Excel.

The ability to manage security of the reports has also been greatly simplified. With restrictions now only enforced where personal information might be exposed. You should also notice you don't need to login. SharePoint uses your already verified credentials from your PC.

Things that have changed

Logging In

Previously the reports were accessed via Strategic Planning on the InfoWeb now, with their separation from PlanIT, they will be access via the Business Reporting link, or you can go directly via http://insight.cpit.ac.nz/reports/Pages/Default.aspx

My Reports

All the reports previously accessed via My Reports are now found under the new headings of Academic Reports, Work Instruction & Other Reports. The information is all still there but the way you navigate to it has changed.
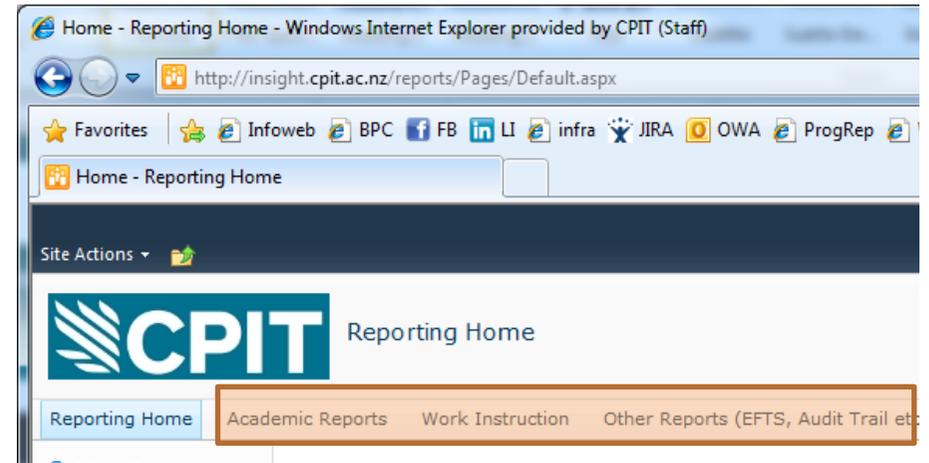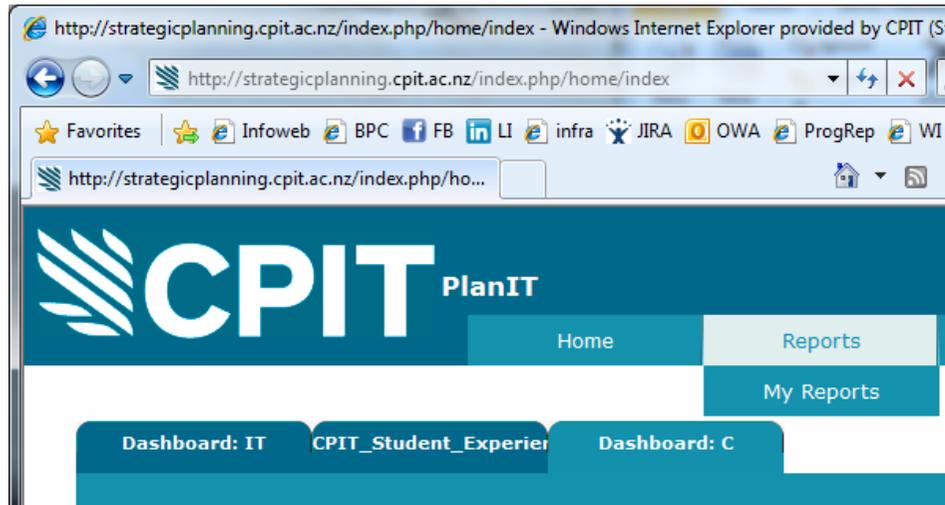
Drill Down

Clicking on the detailed rows of the table on the dashboard homepage will no longer drill down into more detailed information. To drill down in the new portal either click on the column titles or Surplus line or use the departmental links on the left hand side.

Printing & Exporting

There are no Print, Export or Save As buttons in the new portal. Print & Export are now found under the Actions Menu on the dashboard itself.

Things that are new

Navigation

Instead of using the back arrow in your Internet Browser to go back to the previous layer of the report you were looking at you need to use the back arrow in the dashboard itself.
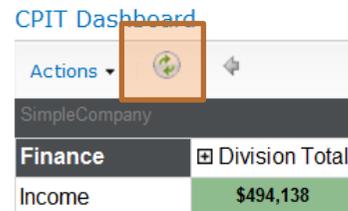
Drill Down

To drill down to a cost centre level you will need to enter 'parameters'.
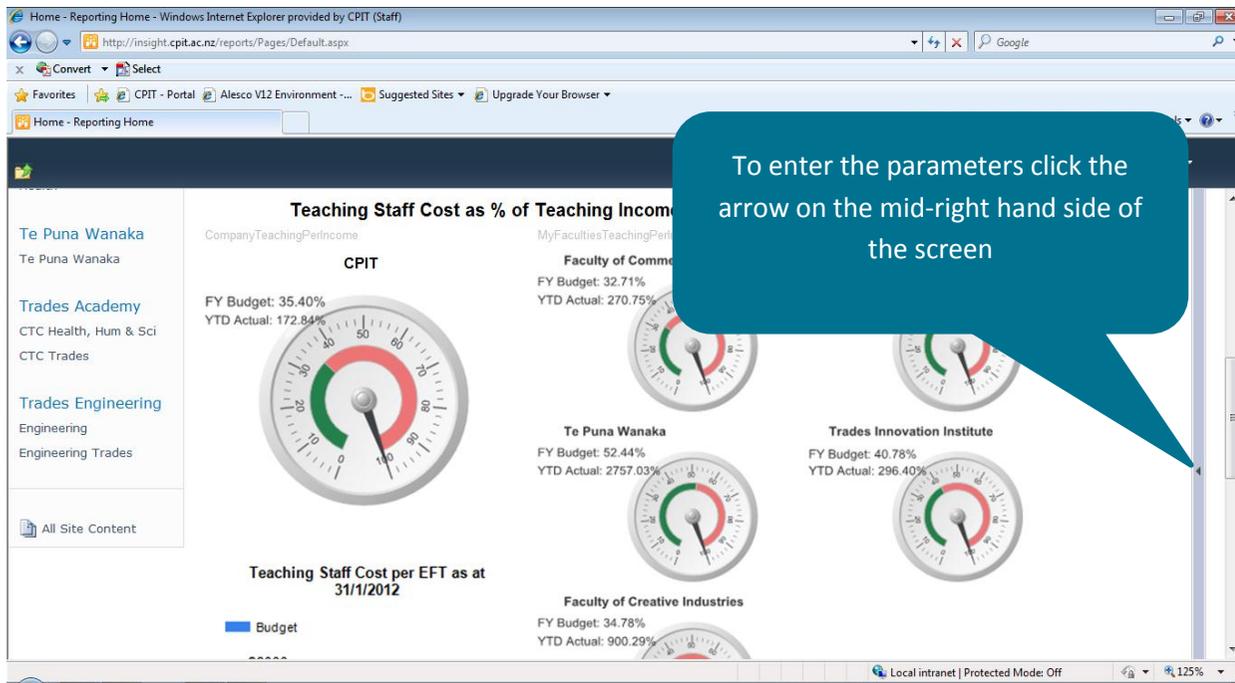
Enter the parameters you wish to report on, then scroll down and press the Apply button.

To enter the parameters click the arrow on the mid-right hand side of the screen

Tips & Tricks

You can still click on the images on the dashboard homepage to drill down to a department level. Notice how the table heading changes so you know what level of the report you are at.

CPIT Dashboard

Actions ▾

SimpleCompany	CPIT			
Finance	⊞ Division Total	⊞ Faculty Total	CPIT Total	CPIT Budget
Income	$494,138	$501,604	$995,741	$2,874,313
Staffing	$1,187,405	$1,783,305	$2,970,710	$3,018,002
GEG	$1,077,066	$-3,565	$1,073,501	$2,577,033
Depreciation	$72,625		$72,625	$44,244
Surplus	-$1,842,958	-$1,278,136	-$3,121,094	-$2,764,966

Dashboard

CPIT Dashboard

Actions ▾

SimpleFaculty			Faculty of Commerce				
Finance	FCA	FCB	FCC	FCF	FCN	FCR	Total
Income	$0	$11,868	$168	$68,592	-$1,604	$27,508	$106,533
Staffing	$61,932	$80,484	$87,365	$117,833	$27,936	$32,082	$407,633
GEG	$1,287	$1,102	$1,421	$24,441	$812	$10,362	$39,426
Expenditure	$63,219	$81,586	$88,786	$142,275	$28,748	$42,444	$447,058
Surplus	-$63,219	-$69,718	-$88,618	-$73,683	-$30,352	-$14,936	-$340,525

Dashboard

The current system reflects the old organisational structure. This may take some time to resolve and could lead to some confusion. The reports reflect structures in other systems and will need to be updated as changes in those systems occur. This will happen gradually over time. If you notice distinctly confusing structural issues please log a job with the ICT Service Desk so that they can be investigated.

Where do I go if I need more information?

For help on interpreting the reports and understanding the numbers	David Kerby Management Accountant	David.Kerby@cpit.ac.nz Ext.8258
For help on using and navigating through the new portal	Karen Thomas Corporate Trainer	Karen.Thomas@cpit.ac.nz Ext. 8092
For any technical issues in accessing the new portal	ICT Service Desk	ICTServiceDesk@cpit.ac.nz Ext. 8800