

Management Reporting Training Guides

One-on-One Training

½Getting Started: Read "*Navigating Management Reporting's Waters*". Click on this link or the Help button to access this document.

½[Section 1 Logging in and Using the "My Page" Section](#)

½[Section 2 Using the "Working" Section](#)

½[Section 3 Using the "Learning" Sections](#)

½[Section 4 Using the "Searching" Section](#)

½[Section 5 Using the "Bookmarks" Section](#)

½"*Frequently Asked Questions/User Problems*"

Self-Paced Training Guide for Internet Explorer

Section 1: Logging In and Using the "My Page" Section

Goal:	Learn about Management Reporting's log-in procedure and each user's personalized homepage.
Learning:	The user enters Management Reporting by double-clicking the Internet Explorer icon on the desktop, then completes the log-in process by entering X.500 username and password. The log-in page carries constantly rotating tips to enlarge your general computer knowledge, provides a link to personalize your settings and update as necessary, and includes an e-mail link to report "bugs" to Management Reporting staff.
Action:	Double-click on the Internet Explorer icon. If your homepage is not set to Management Reporting, type in its URL: http://www.umreports.umn.edu and press "Enter" (the return button). The log-in page appears. ½Log-in by entering your X.500 username and password, then clicking on the "User Login" button. When you click on "Login", another window appears. It needs to be maximized to see all information. Click the square in the upper right-hand corner to maximize, then click on "Continue" to reach your personal page.

The "Log in" screens are illustrated below.

Click on "Personalize" to update your account information, then click on "Account Information". Notice the information that appears at the bottom of this final screen - your current browser, IP address, operating system, and screen resolution. You may be asked about this information if you call the Management Reporting User Support Line so that we can better focus on the source of your problem. This part of the personalization screen also tracks the last time you logged in and how many times you've logged in.

Make changes in the information boxes, then click on "Update". A screen appears with your new information and you're asked to confirm it; click "Confirm". Then, click on the link at the bottom of the screen to return to your personal page.

The "Personalizing Account Information" screens are illustrated below:

To update bookmarks, return to "My Page". Click on "personalize", then on "bookmarks" to add or delete bookmarks. (To learn more about bookmarks, skip to Section 5 for procedure and practice.) **NOTE: Section 5 is under construction at this time.** The great thing about placing your bookmarks in Management Reporting is that they travel with you. If you access Management Reporting through someone else's computer or your home computer, your bookmarks will be there for you ½ what a convenience!

To report a bug within Management Reporting or request an enhancement you'd like to see, return to "My Page" and click on "Bug Report". You'll be able to send an e-mail to the development staff at Management Reporting; you'll generally receive a response within 48 hours.

[Return to top of page.](#)

Self-Paced Training Guide for Internet Explorer

Section 2: Logging In and Using the "Working" Section

Goal:	Learn to use the different modules available to work inside the Management Reporting environment.
Learning:	Management Reporting has developed four modules to facilitate your information and decision support needs. Working with "Finances" is a great way to keep everything in balance when you let Management Reporting work with you. Navigate right to the places where attention is required and download the data directly into your spreadsheet when further analysis is required. You'll be able to quickly find various University resources to assist you in managing your "Human Resources" and future plans for helping you manage your personnel processes. Working with "Assets" doesn't have to be treasure hunt for lost equipment. You no longer have to head into inventory from scratch, nor do you have to scratch your head when Inventory Services staff come knocking. Working with "Instruction" is less of an assignment with Management Reporting. Check out the types of features and functionality we plan on releasing to assist you with the management of our most important resource - Instruction. (Need to know more? The "Help" button at the top right of each screen will take you to "Navigating Management Reporting's Waters", a brief overview of the Management Reporting site.)
Action:	<p>Click on "Working", then on "Finances". You can access the entire component by clicking on "Not sure? Click here for All" and reading through the report descriptions. What financial reports do you need? At what level? Are you working with sponsored or non-sponsored funds? Do you need ICR data? Do you need to go to the CUFS screen? To BASIS? To Forms Nirvana? To ORTTA? It's all here in one place! Suppose you want to check out the expenditures for the month of August in a non-sponsored account? Here's what to do:</p> <p>Click on "Financial Reports - Non Sponsored", then on "Account Transactions Report", then on the appropriate fiscal year, then on period 02. Voile! How easy can it get?</p>

When you click on "Working", then on "Finances", the following screen appears:

You're able to access your particular area by drilling down; try this by clicking on "Financial Reports-Non Sponsored", then on "Account Transactions Report" or another category, then on desired year as illustrated below.

Continue drilling down by clicking on your Area, then on "All".

Notice the information in the top bar of the report. It tells you the year you're currently viewing, the area and org, and various other information. Note that you can view other years by clicking on "these fiscal years" and selecting the appropriate time period.

This screen is illustrated below.

Once you've reached a report, you may want to bookmark it so that you can access it more quickly without going through the drill-down process. Just click on the "Add to Bookmarks" button and follow the prompts. Read through "learn how" (beneath the "Add to Bookmarks" button) for a good overview on the process.

If you need to modify this report for a meeting, for example, click on "save to Excel" button and follow the prompts. Read through "learn how" (beneath the "Excel" button) for a good overview on the process.

Click on "Working" in the toolbar, then on "with Human Resources". Access the entire component by clicking on "Not sure? Click here for All". You'll find an Excel template for Faculty Salary Merit that's designed to help a college and department through the faculty merit salary review process. "Human Resources Information" provides information from other University web pages and phone numbers that are relevant to your work. Please note that these pages are not maintained by us, so we cannot guarantee their availability, accuracy, or content.

Suppose you needed a generic job description?
Click on "Human Resources Information", then on "OHR Position Classification Database", and follow the prompts.

The "Working with Human Resources" screens are illustrated below.

Click on "Working", then on "with Assets". Access the entire component by clicking on "⌵Not sure? Click here for All". Checking out "Space Reports - Space Management", you'll notice that this data is extracted from the University SPAM database. This data is believed to reflect University space currently assigned to your area. Any corrections or changes to the data need to be reported to the University Budget Office in order to ensure final correction to the SPAM Database.

Suppose you wanted to view data for your College or Department?
⌵Click on "Space Management Data".

The "Working with Assets" screen is illustrated below.



Click on "Working", then on "with Instruction". Access the entire component by clicking on "⌵Not sure? Click here for All". If you're working with the University IMG tuition model, the information contained here is enlightening. Decide on type of report in which you're interested, say "Tuition Attribution Course Reports". These reports are designed to demonstrate NET tuition generated by course instruction. Information presented here shows 100% of the tuition and student credit hours (SCH) generated by courses currently mapped back to a department, college, provost or campus. Note that the University IMG tuition model attributes only 75% of actual instructional level to a college.

⌵Click on appropriate level. Please be patient. These reports contain lots of data and take time to appear. If you print one of these reports, change the "Page Setup" to "Landscape" to accommodate the width of the report.

The "Working with Instruction" screen is illustrated below.



For an overview of Instruction, the IMG Tuition Attribution process, and an explanation of how information is reflected on the reports, drill down to any instructional report, then click on the "Help" button.

The "Help" document screen is illustrated below.



[Return to top of page.](#)



Self-Paced Training Guide for Internet Explorer

Section 3: Using the "Learning" Section

Goal:	Learn about various information resources available within the Management Reporting environment.
Learning:	This section provides links to bring helpful information to your desktop. You'll find information about Management Reporting, the UM, Higher Education, and Other/Global. These areas can be accessed by clicking on "Learning", then on one of the four areas on the drop-down menu. You can reach separate sections within each site, or access the entire component by clicking on "⌵Not sure? Click here for All". (Need to know more? The "Help" button at the top right of the screen will take you to "Navigating Management Reporting's Waters", a brief overview of the Management Reporting site.)
Action:	<p>Click on "Learning", then on the one of the four areas on the drop-down menu. Here's a guide for each one:</p> <p>⌵ about Management Reporting</p> <p>⌵Click on "Learning about Management Reporting - Main Page". You can learn about Management Reporting in several ways, depending on your interest, duties, and time. The links on this page contain information that will help you with getting started and getting the most out of Management Reporting, while providing information on where to go for further assistance and training. Some good areas to check out include "Management Reporting-Frequently Asked Questions" and "Navigating Management Reporting's Waters".</p> <p>⌵Open any report under Finances or Instruction. Learn how to open a report in Excel by clicking on "learn how" under the Excel button at the top right. You'll reach a help document entitled, "Opening Excel Versions of Management Reporting Documents."</p> <p>⌵Reach "Navigating Management Reporting's Waters" by clicking on the Help button; this is a great place for new users to become familiar with Management Reporting.</p> <p>⌵Click on "⌵Not sure? Click here for All" and receive a listing of all the links contained in this section.</p>

The "Learning about Management Reporting" screen is illustrated below. Notice how easily you can jump to other sections by clicking on one of the links on the Toolbar (My Page, Working, Learning, Searching, Bookmarks, Exit) or on the Buttons (about Management Reporting, about the UM, about Higher

Education, about Other/Global).



½ about the UM

No more calling around ½ we've brought it together for you! Here are links for different information at the UM, i.e., Departments, Publications/Facts, Policies, Calendars, or Services. Click on each area below and find out what's available:

½Click on "U Policies" to reach links to collections of U policies: Regents, General Policies Homepage, and Research Policies.

½Click on "U Departments" to reach various non-educational departments at the U, including Bookstore, Computer Store, Food Services, etc. Scroll down to see more.

½Click on other areas to see what's available.

The "Learning about UM" screen is illustrated below.



½ about Higher Education

Here are links to access information outside the University. What do you need? There are databases for peer comparison or institution classification, links to other higher education colleges or institutions, agencies or organizations that support higher education, higher education publications, and reference services. Find out more by clicking on the areas below.

½Click on each link to access this information: "Databases", "Organizations", "Publications", and "Services".

The "Learning about Higher Education" screen is illustrated below.



½ about Other/Global

Here are links to different news sources, computer support, an encyclopedia, the Federal Consumer Education Center, and electronic magazines. Look them over!

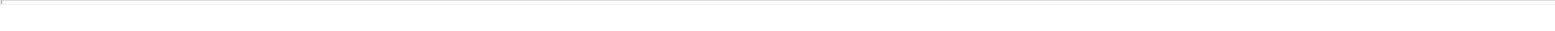
½Click on "News - Local" and reach local newspapers and television stations.

½Click on "Electronic Magazine"; what's available? Read the current issue before it reaches your home!

The "Other/Global" screen is illustrated below.



[Return to top of page.](#)



Self-Paced Training Guide for Internet Explorer

Section 4: Logging In and Using the "Searching" Section

Goal:	Learn to utilize and locate resources inside and outside of the Management Reporting environment.
Learning:	Management Reporting has been designed to provide you with a consistent and intuitive interface to navigating around the site. This has been done by using frames to define unique areas on each page. These different areas are separated by a thin blue horizontal line running the full width of your browser window. This two-frame approach was created to allow you to navigate around the site while retaining the toolbar top frame and its functionality. Our goal is to help you learn how to get to the content you desire quickly and we've provided search capabilities to do that. In this section, you can search within the ½Management Reporting" environment, at the "U of M", or on the "Internet". (Need to know more? The "Help" button at the top right of each screen will take you to

	"Navigating Management Reporting's Waters", a brief overview of the Management Reporting site.)
Action:	Click on "Searching", then on one of the selections in the drop-down window: Management Reporting, the U of M, or the Internet. In this exercise, click on Management Reporting. To search within Management Reporting, type what you're searching for in the box and click on the "Search" button.

The "Searching" menu screen is illustrated below.

The "Searching Management Reporting" screen is illustrated below.

Click on "Searching", then on "the U of M". Clicking on "Search for a Department's Home Page" takes you to a search page to find departmental home pages on the Twin Cities Campus.

The "Searching the University" screen is illustrated below.

Self-Paced Training Guide for Internet Explorer

Section 5: Personalizing Management Reporting with Bookmarks

When you're done reading this, you can return to the [Management Reporting User's Guide](#)
[Personalizing Bookmark Training Guide \(.doc\)](#)

What are Bookmarks?

Bookmarks or favorites, as Internet Explorer calls them, are a method of saving addresses of pages or sites that you would like to revisit. Bookmarks act as an address book by keeping a record of important internet addresses (or URL's). While your browser can keep a directory of your favorites on your computer, this can be a problem when you are away from that computer and browser, or if you need a certain address while you are at home or on the road. Bookmarks stored in Favorites will be inaccessible. However, this is not the case if you store bookmarks in Management Reporting!

With Management Reporting's personal bookmarks, you can store important bookmarks on our server. This is a handy way to collect URL's to access regardless of which browser or computer you happen to be using. Your bookmarks will be attached to your username and password; all you have to do to access them is to log into Management Reporting.

With Management Reporting bookmarks, you have the ability to save the addresses of any of Management Reporting's dynamic reports and still always have the latest data without having to refresh or re-bookmark a site. An added feature of Management Reporting's bookmarks is the ability to edit & rename any and all of your URL's at any time; your important pages can always be given names that make sense to you.

This page documents the following features of Management Reporting's bookmarks and explains how to best utilize them:

- [Navigating to One of Your Management Reporting Bookmarks](#)
- [Creating a Bookmark to a Management Reporting Report](#)
- [Creating a Bookmark to a Other Pages of Other Web Sites](#)
- [Editing or Deleting an Existing Bookmark](#)
- [Creating Bookmark Categories](#)

Navigating to One of Your Managment Reporting Bookmarks

- Log into Management Reporting or if already logged in, navigate to your home page by clicking on the **My Page** button on the toolbar.

Internet Explorer Users

- If you're using Internet Explorer 4.01 or above, go to the Management Reporting toolbar and click on the area called "Bookmarks". A dropdown menu will appear and you will be able to view a complete list of the bookmarks. Notice how they are organized into different categories (i.e., Colleges, Campuses, My Bookmarks, etc.). This screen is illustrated below:

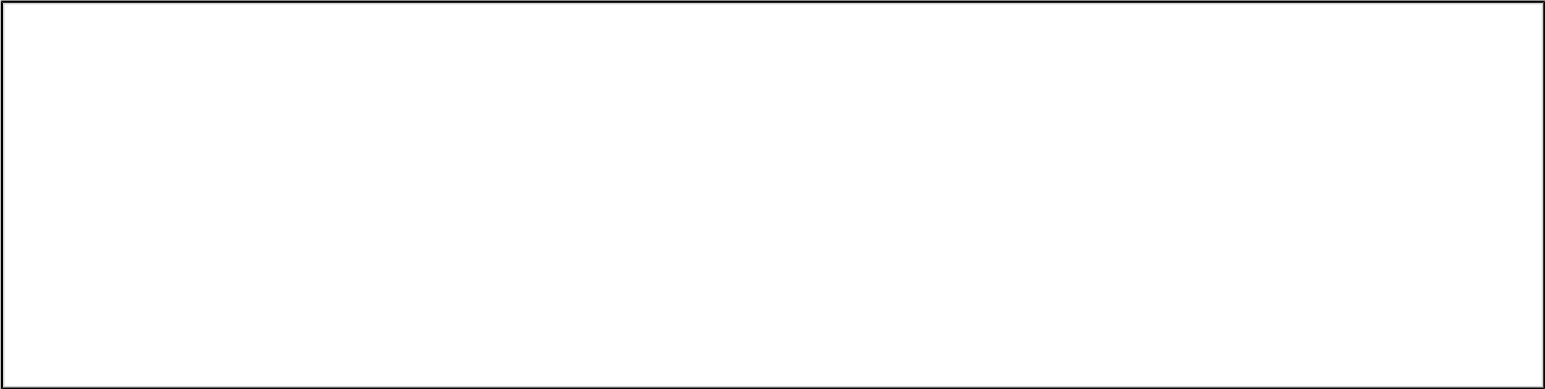


Netscape Users

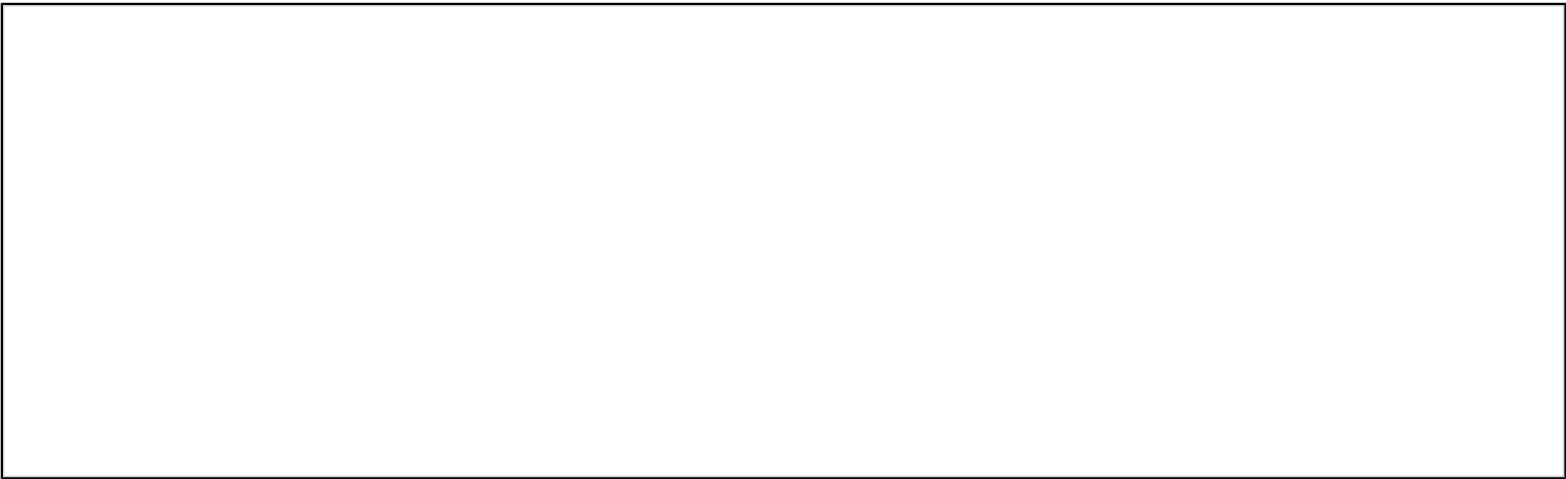
- If you're using Netscape Communicator/Navigator 4.6 or above, go to the Management Reporting toolbar and click on the down arrow next to words, "Administrative Units". If you do not have an arrow, just click and hold down on the words "Administrative Units". A drop-down menu will appear and you'll be able to view a complete list of the bookmarks. Note that they are organized into different categories (i.e., Colleges, Campuses, My Bookmarks, etc.). This screen is illustrated below:
- To jump to a specific bookmark, simply select the appropriate bookmark from the choices appearing in the drop-down list box.

Creating a Bookmark to a Management Reporting Report

- Log into Management Reporting and open any of the many reports. You'll notice an Add to Bookmarks icon (shown at right). To create a bookmark to the current report, simply click on this icon.
- You will be prompted to give your new bookmark a name (see below). You can use the URL name by using the "Copy" and "Paste" command. Or, give it an easily- remembered name by typing a title that makes sense to you.
- You can also change location of the bookmark in the "Group Name" just click on the down arrow to choose a location.
- Click the "Create" button.



- You'll see a screen with the message, "Record Inserted" -- see below:



- Click on the "Back to...(your report name)..." button to return to the report you just bookmarked. (See below)



- If you want to view your bookmark immediately, go to your browser toolbar located at top of the screen and click on the "Refresh" button (Internet Explorer users) or "Reload" (Netscape users). See below:



NOTE: Management Reporting will save your new bookmarks or changes automatically when you log off. Therefore, this step is only necessary if you wish to view your changes prior to logging off the system.

- Your new bookmark should now appear in the drop-down list under Bookmarks, in your chosen category, as seen below:



- To test the bookmark you have just created, select it and click

Creating a Bookmark to a Other Page or Other Web Sites

- Log into Management Reporting or if already logged in, navigate to your home page by clicking on the My Page button on the toolbar.
- The bookmark personalization screen can be accessed in two ways:
(1) On the toolbar, click on "Bookmarks" (IE users) or "Administrative Units (Netscape users)", then on "Management Reporting", then "Personalize My Bookmarks", OR to reach this screen more quickly,
(2) Navigate to your home page, then click "Add a Bookmark" in the left column
- These screens are illustrated below for both browsers:

Internet Explorer:

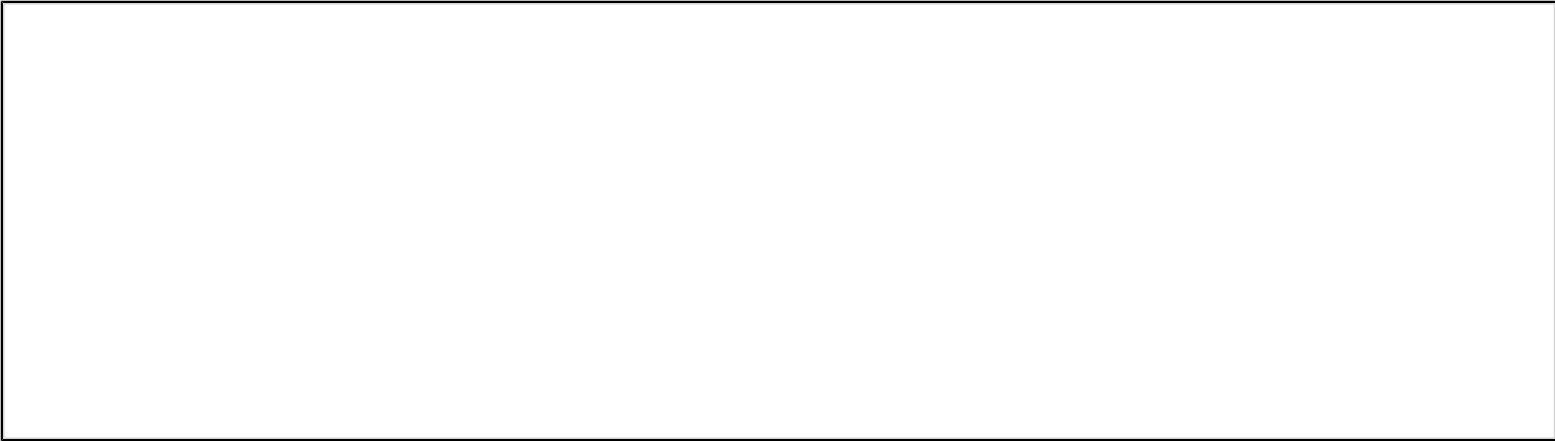
Netscape:

- To add your own bookmark, open up your browser to that web site and copy the URL from the address bar. Open up Bookmarks in one of the two ways discussed on the last page. Click on the "Make a New Record" button. You'll see a blank record; paste the URL address in the "URL" box. Type an easily-remembered name in the "Bookmark Name" box. Choose a group in the next box, for example, "My Bookmarks". Click on the "Create" button. Remember, it won't show up on the drop-down menus until you log out and restart Management Reporting OR you hit the "Refresh" (IE users) or "Reload" (Netscape users) button on the toolbar.

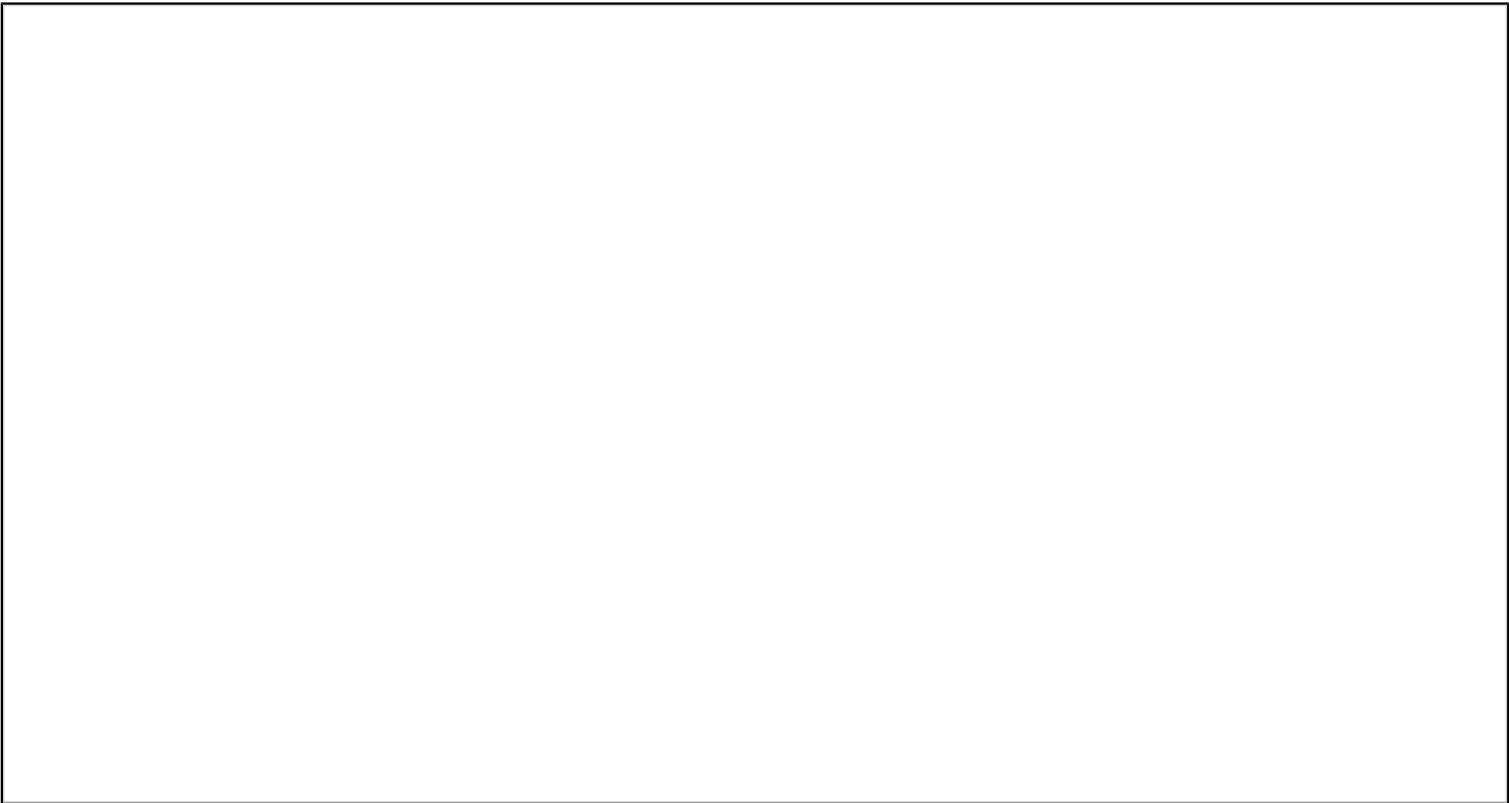


Editing or deleting an Existing Bookmark

- Open up Bookmarks in one of the two ways previously discussed. Click on the "Back to Bookmark List" link (see below).



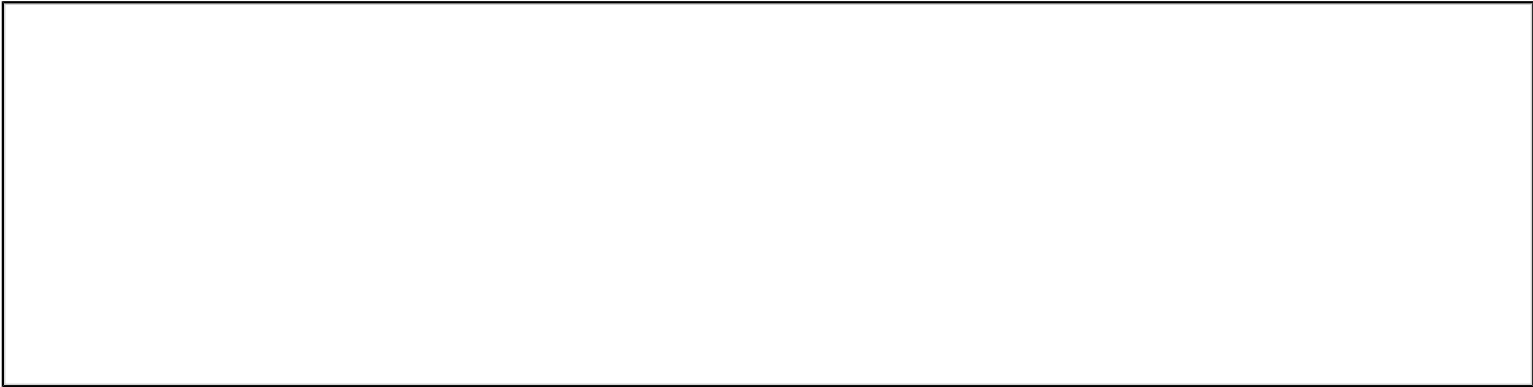
- Choose the file location by clicking on the down arrow and selecting one, "My Bookmarks" in this example. A table of all the URLs in that location appears. Scroll down until you find the URL you want to edit or delete, then click the "Edit" button.

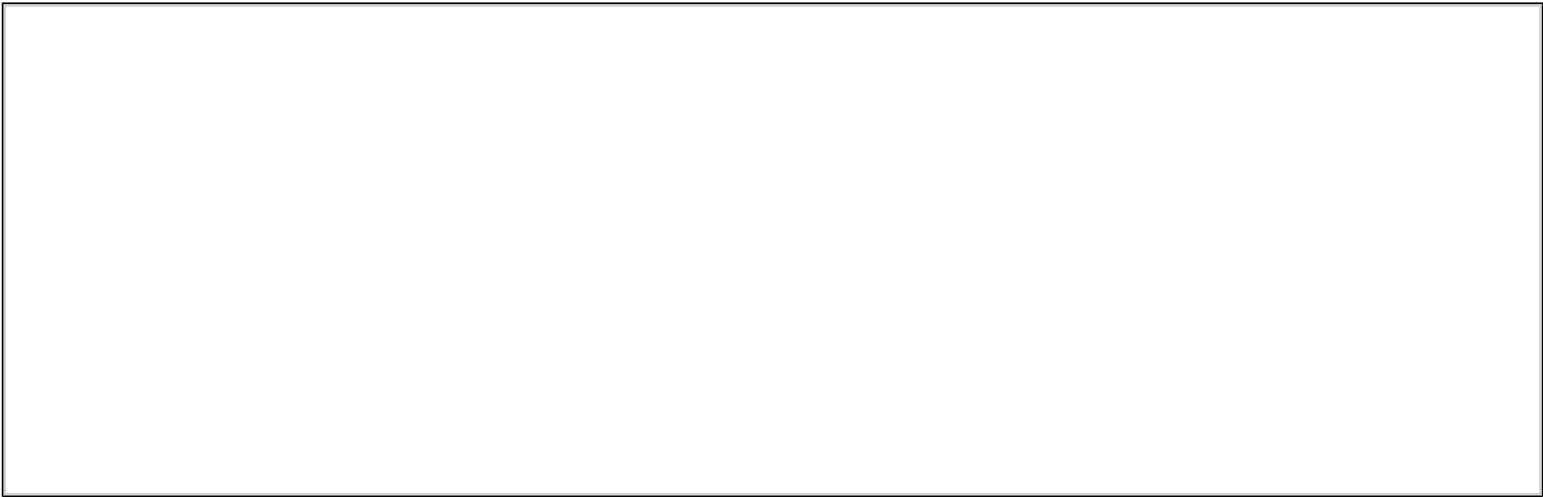


- Make any corrections you wish, to the URL, to the bookmark name, etc., then click on the "Update" button. You'll see another window that indicates record was updated (see below).



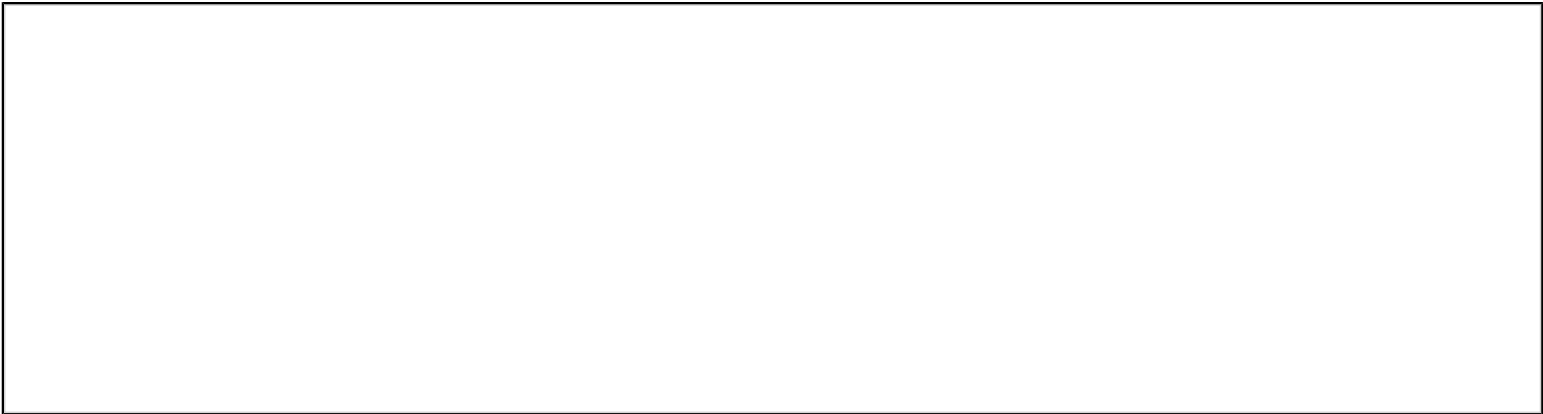
- If you wish to delete this URL instead, click on the "Delete" button. You'll receive a prompt asking you to confirm this delete. Click the "Confirm Delete" button. You'll see a screen indicating record was deleted (see below). Remember to click the "Refresh/Reload" button if you want to see effect immediately.





Creating Bookmark Categories

- Open Bookmarks in one of the two ways previously discussed. Click on the "Edit Groups" button; then, click on "Make a New Record". (See below)



- You'll see a new screen that prompts you for your new category name; type it in the box and click on the "Create" button. (See below) Remember to click the "Refresh/Reload" button to see effect immediately.

That's it! We hope you leave this document with a better understanding of Management Reporting's bookmark feature. If there is anything we can do to make Management Reporting better fit your needs, please do not hesitate to contact us at the:

IMS User Support Line: 626-8812

When you're done reading this, you can return to the [Management Reporting User's Guide](#)

[Personalizing Bookmark Training Guide \(.doc\)](#)

[Return to top of page.](#)