

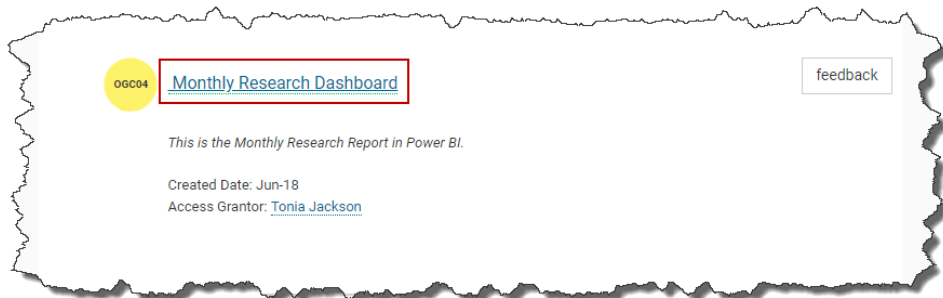
Monthly Research Dashboard

Navigation & Export

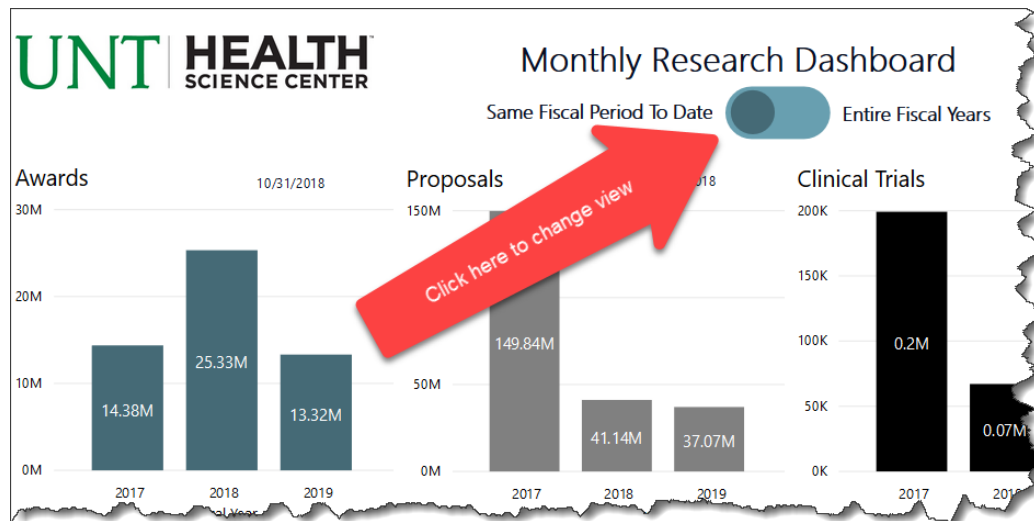
1. Go to the [Reporting page](#) on Insite, and scroll down to the HSC Research section and click to expand



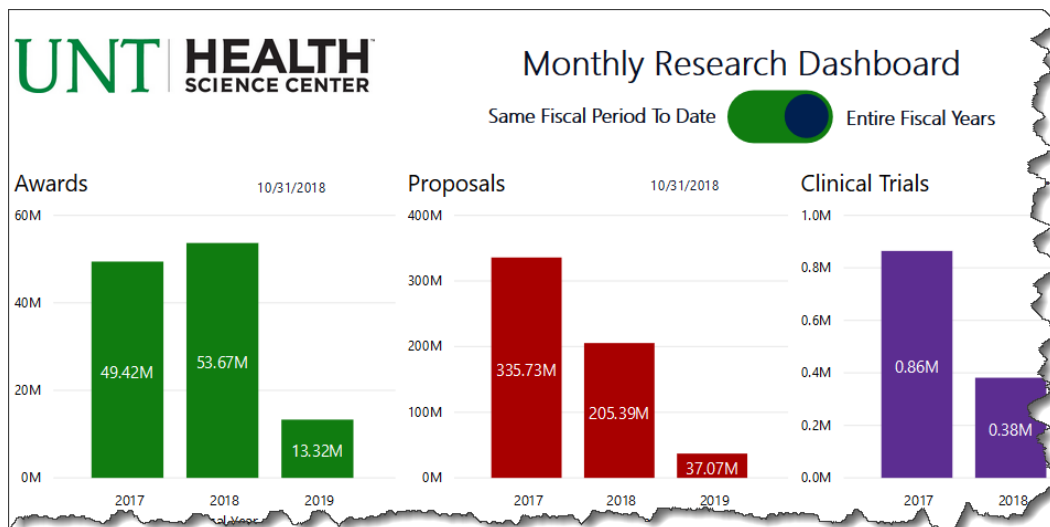
2. Select "Monthly Research Dashboard" to open a new tab for Power BI



3. If prompted, sign in using your UNTHSC email address (ending in @unthsc.edu)
4. Once signed in, you should see something like the screen below



5. Clicking the toggle switch at the top will switch between the default view of showing year to date values as of the same period in the prior two fiscal years, to showing the entire prior two fiscal years' totals



6. From here, you can navigate the report using the tabs at the bottom, similar to Excel

7. Starting with the 5th tab called “All Monthly Report Data” you will see slicers/filters at the top that can be used to filter the report

The screenshot shows the 'All Monthly Report Data' dashboard. At the top, there are filters for 'College' (with a search bar and a list of options), 'Award' (CTCR, Proposal), and 'Fiscal Year' (2017, 2018, 2019). A red box highlights the search bar with the text 'Start typing here to narrow the choices'. A green arrow points to the 'Fiscal Year' filter with the text 'Click to change or remove the Filters'. Below the filters is a table with columns: Fiscal Year, Report ID, PI Name, Funding Category, and Sponsor.

Fiscal Year	Report ID	PI Name	Funding Category	Sponsor
2019	HP00009991001644	Acharya, Suchismita	F-All other sources	Glaucoma Research Foundation
2019	RC00073	Al-Faraj, Sherif T	F-Business	GlaxoSmithKline

8. Once the table displays the records you need, simply click the ellipsis (...) at the top right of the table and choose Export data

The screenshot shows a table with columns: IDC Base, IDC%, Indirect Amount, Direct, and Total Amount. The table contains several rows of data. An ellipsis menu (...) is open at the top right of the table, showing options: 'Export data', 'Show Data', 'Spotlight', 'Sort Descending', 'Sort Ascending', and 'Sort by'.

9. Finally, choose “Underlying Data” then click the Export button to download the data to Excel for further exploration

The screenshot shows the 'Export data' dialog box. It asks 'Which data would you like to export?' with two options: 'Summarized data' and 'Underlying data'. The 'Underlying data' option is selected and circled in red. Below the options, there is a 'File format' dropdown set to '.xlsx (Excel)'. There are also three informational notes: 'Data will export with applied filters', 'For large data models, there are limits on the number of rows that can be exported. [Learn more](#)', and 'At this time, we only support exporting underlying data to Excel format (.xlsx)'. At the bottom, there are 'Export' and 'Cancel' buttons.