Brio Portal:
Electronic Reporting Distribution (ERD)

The Brio Portal is an interface that users log into in order to access either the ERD and/or Data Warehouse systems.

Electronic Reporting Distribution (ERD) is a system that will allow the viewing and printing of Banner Finance Month-End reports (initially) by financial managers who have access to specific fund and organization codes in the Banner Finance system. Report files can be viewed and/or printed in HTML or PDF (Adobe Acrobat) format.

Logging In To the Portal

Accessing the Portal is accomplished by entering a URL in your web browser. A login screen will be presented, asking for the user’s unique username and password.

1. To access the Brio Portal login screen enter the following URL and press Enter.

   http://www.rpi.edu/datawarehouse/portal.html

   **NOTE:** If a cookie for Brio Portal does not exist, you will be presented with the “Welcome to Brio.Portal! Make a choice for Web browser”.
   In this case, select the first option and click **Save**.
2. If you intend on being an **ERD** and **Data Warehouse** user, please proceed to step 2a. If you intend on only using **ERD**, click Cancel when the **Brio Insight** plug-in installation window appears and proceed to step 3. Brio Insight is not required for **ERD** users.

2a. If you are an **ERD** and **Data Warehouse** user **Brio Insight** is required.

To start the process of installing **Brio Insight**, click **Begin**.
The information dialog box appears. Click **OK**.

Brio Insight has been successfully installed.

**Login Screen**

3. At the login screen, enter a valid

   - Username
   - Password

   You will be given a user-specific username and initial password. To change the password, refer to the section entitled Preferences Tab.

4. Click **Login**.
The report structure will appear in the navigation pane located on the Browse Tab.

1. Click on the RPI-Troy folder to view
   - Reports by Fund folder: currently one report entitled, Fund Statement, is available to view and/or print from this folder. Access to this report is determined by the fund codes the user has access to in the Banner Finance system.
• **Reports by Organization folder**: currently one report entitled, Organization Statement, is available to view and/or print from this folder. Access to this report is determined by the organization codes the user has access to in the Banner Finance system.

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**Reports by Organization: Folder Structure**

Click on folders by organization code that contain report information for organizations that user has access to.
II. Click on the **User Specific Reports** folder to view
   - **Specific Userid** folder: other month-end reports that will become available for viewing/printing that are ‘owned’ by a financial manager as identified on the fund or organization in Banner. Typically, the majority of reports available to the user will be located in this folder.
The output of a report is displayed in three output file formats – html, pdf and spf. If you happen to see the spf icon only, it means, the report generation is still going on and have to wait till all the three icons are displayed.

The resultant output can be viewed by clicking on anyone of the 3 icons.
Click on the web browser’s Back button to return to the Browse Tab
Changing Your Password

- Click on the Preferences Tab
- Click on Password
- Enter Current, New and Confirmed New Passwords
- Click Save
ERD Reports

Month End Reports Available via ERD

Data Warehouse
Brio Portal
Electronic Report Distribution
RPI - Troy
Reports By Fund
  Fund Type NIN
    fgrnfplis  X  Fund Statement
    fgrufp  - Fund Statement
    fgrufplis  X  Fund Statement For Grants With More Than 1 Fund
Reports By Org
  Orgs starting with NIN
    fgronplis  X  Organizational Statement
    fgrufplis  X  Fund Statement by Fund
User Specific Reports
  fgtilede.lst  X  List of Overexpend Restricted Funds Sponsored and Gift
  fgtilegl.lst  X  List of Grants with Overexpend Funds by Org
  fgtilepl.lst  X  List of Overexpend Restricted Funds Sponsored and Gift
  fgrboh2.lst  X  Budget Status by Organization Hierarchy Level 2
  fgrboh3.lst  X  Budget Status by Organization Hierarchy Level 3
  fgrboh4.lst  X  Budget Status by Organization Hierarchy Level 4
  fgrboh5.lst  IN  Budget Status by Organization Hierarchy Level 5
  fgrbudo2.lst  X  Budget Summary by Organization - Level 2
  fgrbudo3.lst  X  Budget Summary by Organization - Level 3
  fgrbudo4.lst  X  Budget Summary by Organization - Level 4
  fgrbudo5.lst  IN  Budget Summary by Organization - Level 5
  fglalbdlst  X  Labor Report - Detail
  fglalbdlo  X  Labor Report
  fglalbclo  X  Labor Report
  fglalblis  X  Labor Report - Summary
  fgrmoes2.lst  X  Expense Summary by Fund Type - Level 2
  fgrmoes3.lst  X  Expense Summary by Fund Type - Level 3
  fgrmoes4.lst  X  Expense Summary by Fund Type - Level 4
  fgrmoes5.lst  X  Expense Summary by Fund Type - Level 5
  fgrchb2.lst  X  Organization Budget Summary by Fund Type - Level 2
  fgrchb3.lst  X  Organization Budget Summary by Fund Type - Level 3
  fgrchb4.lst  X  Organization Budget Summary by Fund Type - Level 4
  fgrchb5.lst  X  Organization Budget Summary by Fund Type - Level 5
  fgrbmg.lst  X  Budget Summary by Fund Type
  fgrhral.lst  X  Budget Summary by Fund Type - Level 2
  fgrhral3.lst  X  Budget Summary by Fund Type - Level 3
  fgrhral4.lst  X  Budget Summary by Fund Type - Level 4
  fgrbdge_sss.lst  X  Budget Status (Current Period) - School of Science
  fgrbdge_sals.lst  X  Budget Status (Current Period) - Student Life
  fgrbdge_huls.lst  X  Budget Status (Current Period) - School of Humanities
  fgrpodss.lst  X  Organization Detail Activity Report - School of Science

X = Published
IN = Available if Needed