

Welcome to the new DEMIS portal!!

Important Information on using the new DEMIS web portal:

Please read this document all the way through. Many of your questions will be answered here.

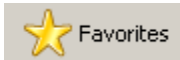
The new DEMIS environment is a portal, and therefore each user will have his/her own customizable environment. So when you log on for the first time, it might take awhile for your environment to establish itself if a large group of users are doing it at the same time. Please be patient. We will refer to the new DEMIS environment as the **DEMIS portal**, and the old DEMIS site (<https://demis.ku.edu>) as DEMIS. The old DEMIS site will continue to stay up and functional for the next several months, although no new financial data will show up there.

Access:

Users will access the system via the web at the URL = <https://demisweb.ku.edu/Portal>

A link to the system will also be on the Comptroller's Home Page in the Financial System Administration area; the Comptroller's home page address is <http://www.comptroller.ku.edu/>.

The URL can be saved as one of your internet favorites



ID and Password:


Your KU Online ID (the same used to access Exchange email and Kyou Portal) will be your ID and password to the upgraded DEMIS Portal. The ID is not case sensitive (upper and lower case allowed). The password is case sensitive.


What is available now?


From the Financial reporting perspective, financial transactions (not related to grants) for both business units can now be queried under the **Financials** subject area. Related query systems are grouped into "portlets," and the new FY 2009 financial data will be found in the "Financials 9.0" portlet (see below).

Financials 9.0 Shared: DEMIS_General

[Click here to refresh collection.](#)

 [Financials FY 2009](#)
Financials (non-grant) datamart last refreshed on 07/25/08 at 6:34:50 AM

 [Financial conversion mapping info](#)
Chart of accounts mapping crosswalks from PeopleSoft 7.5 to PeopleSoft 9.0

In addition, data and query systems for past fiscal years have also been migrated to the new portal. If you see this image, , the link associated with it will take you to a query page. For past KUFS queries, look for the portlet called Historical 7.5 KUFS UKANS Reports for past CRINCFS queries, look for the portlet called Historical 7.5 CRINCFS Reports.

THINGS TO BE AWARE OF...

Browser requirement. The software that runs the new reporting environment works best with Internet Explorer 6 or higher. In fact, we would **strongly encourage** users to make an effort to use IE with the current version. Although the system will usually work with Firefox, some features might not look or function correctly. An upgrade to a newer version of the software is planned for later this year and it will officially support Firefox 2.0 or higher.

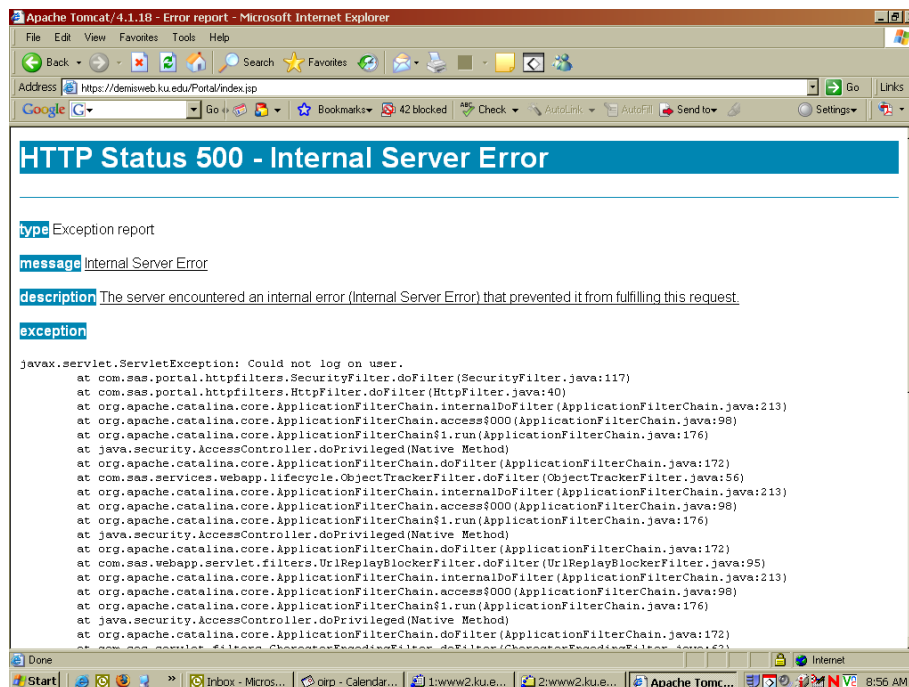
Results window pop-up.

By system default, most queries will display results in a new browser window. We cannot change this default setting with the current version. So for users who use pop-up blockers, the settings for their browser should be set to allow for pop-ups from <https://demisweb.ku.edu>.

When in a query (📌), a user can go to the “Execution Options” link, and set the “Display results in a new window?” option to “No,” but that setting only lasts as long as the current usage of the query form.

Another item to be aware of is that the report results window will get “re-used” so that if the user leaves the results window opened, goes back to the query options, and changes the selections, and executes the new query, the new output will go to the opened results window and replace what is already there, and not create another pop-up window.

User access. We have loaded the following cohort of active employees: 1) those individuals who are currently DEMIS users with an individual signon (e.g., not a DEPTID number); 2) PeopleSoft 9 Financials users who did not have a DEMIS individual signon; and 3) PI's associated with active grants in PeopleSoft 9 Financials. If for some reason, you get a screen that looks like the following when signing on, it means your userid has not been loaded into our system:



If the user is primarily involved with financial reporting, they should first contact Jennifer Hanson (jjhanson@ku.edu). Jennifer will forward to University Management Information any new users who are approved for Financial query access. Financial query access will be the primary focus for

the new DEMIS portal system for this month. If a user's DEMIS access needs are not related to financial reporting, please wait until August before contacting Ryan Cherland (ryan-cherland@ku.edu).

Security enhancements. Your DEMIS session will now timeout with inactivity. It is best to make sure you log-off and close your browser after you are done with your queries. If your session does time out from inactivity, you might get redirected to the KU Online Id sign on page or see a message similar to what you see below. If you get redirected to the KU Online Id sign on page, and sign in, you will also probably see the same message as listed below:

A serious error occurred. Contact the portal administrator.



The best thing to do whenever your session logs you out is to close your web browser windows completely and sign back in.

Running a query

The first time within a DEMIS portal session that you start a query, the web form will take a bit longer than one would expect. This is because the system is establishing that service with your userid and creating a query environment. After the first query selection things will pick up, however the new environment is more data base intensive (the forms do not exist as web pages but are defined in a data base system), and so will seem a bit slower than what you might be use to. However, the advantage to this architecture is that in the future it will allow users to save and reuse queries and reports.

The Financials FY 2009 query

All DEMIS portal queries, including the new Financials FY 2009 query, will have a different look. When you first open it up the query, the query form will have a navigation panel on the left side of the screen.

Query Options
Primary Restrictions
Other Restrictions
Report Breaks
Report options
Output options
Execution Options

The options for the query are now divided into groups on the form, and when you click on a given group link, such as “**Primary restrictions,**” the form displays the query options related to that section. Below is a table which contains which query options you will find with each query group option setting.

Query Options group	Query selections that can be set:
Primary Restrictions	Business Unit: Budget Year: Organizational Unit or specific Cost Centers Fund Codes

Query Options group	Query selections that can be set:
	Account Categories or Account numbers
Other Restrictions	Chartfield1 codes Program Codes Beginning and Ending Date for Transactions Posted and/or Pending Posted Transaction status
Report breaks	Budget Category Cost Center and/or Cost Center #+Descr Account and/or Account #+Descr Chartfield 1 Date Range break Transaction Date (MM-DD-YYYY) Transaction Month (MMYYYY) Pending/Posted Vendor Program Code Primary ARSP Secondary ARSP
Report options	Include detail transactions in report Location of query restriction selections Your own additional title text Your own additional footnote text
Output options	Output format type Page orientation for Word/PDF output Paper size for Word/PDF output Print margins for Word/PDF output Font size for Word/PDF output
Execution options (usually left as defaults)	Display results in a new window? HTTP method Process blank parameter values

When all selections are set as desired, click the “Execute” button to run your query. A video demonstrating the new query and its options can be found in the “General” page in the Help and Training Information portlet.

General Training information and Help ...

Under the General subject area, there is a portlet called Help and Training Information. There you will find some web videos that will lead you through the basics of using the new DEMIS portal. Additional training videos and resource documents will appear in that portlet as they become available.

General reference information that is specific to a given area will be found in the query portlet with the queries. These will contain files in various formats for either printing or loading into Excel.

If you have specific problems using the portal, please send an email to umi_dl@mail.ku.edu or phone us at 4-4412. If the questions are related to what you are finding in your financials queries and reports, please contact Jennifer Hanson (jjhanson@ku.edu).