RUNNING AND SCHEDULING THE DEPARTMENT TERMINATIONS AND TRANSFERS REPORT

INTRODUCTION TO ENTERPRISE ANALYTICS

RUNNING THE REPORT

The following instructions will walk you through the processes of running a report, creating a report view, setting prompts and scheduling the report view for email delivery.

NAVIGATION

Login into myUFL and navigate to:

Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics

1. To open the report, click on the Team Content folder.
   - The Team Content folder is used for reports shared by you and other members of your team. The My Content folder is used for your personal reports.
2. Navigation to the **Department Terminations and Transfers** is Team Content > Campus General Reports

3. To run the report, click the blue title of the report.

4. Select the **options** you would like to use to filter your report. You may search on DeptID and select individual departments to include or check the **Select All** check box then click the **Add selected items to your choices** arrow to have options added to the **Choices** box on the right. Click **Finish** to run the report.
5. To search based on Department Name, change the options from \textit{Starts with any of these keywords} to \textit{Contains any of these keywords}. Enter your search criteria in the \textit{Input keywords here} text box then click \textit{search}. Add your choices to the \textit{Choices} box. Click \textit{Finish} to run the report.
6. The report loads filtered by the options you selected.

7. To run the report with different Prompt criteria, click the play icon.

8. The prompt page will reload with your previous search criteria. To remove the selects, click Select All beneath the Choices box, then click the Remove from the list of selections arrow. Add new search criteria by repeating steps 1 – 5.

9. You can interact with your data and refine your results by clicking on one of the column headers. Filtering, Sorting, and Grouping are frequently used options.

10. Sorting Data
11. Select your sort options: Ascending, Descending or Don’t Sort (remove existing sort)

12. Filtering follows a similar process. To filter, click on the column header. Then, click the filter icon.

13. Click Create Custom Filter.

14. Select the options you would like to filter by. Then, click OK.
15. To export a report, click the **arrow** icon next to the **play** button.

16. Select the **output type** you would like for the exported report.

17. Select any **prompts** you want applied to the exported report. Refer to steps 1 - 5 if needed. Then, click **Next**.

18. The exported report opens in the requested format.
SCHEDULING THE REPORT FOR EMAIL DELIVERY
The following instructions will walk you through the process of scheduling a report.

NAVIGATION
Login into myUFL and navigate to: Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics

1. To open the report, click on the Team Content folder.
   - The Team Content folder is used for reports shared by you and other members of your team. The My Content folder is used for your personal reports.

2. Navigation to the Department Terminations and Transfers is Team Content > Campus General Reports
3. Click the **more** options (ellipses).

4. Select **Create report view**.
5. Name the report as desired and save to your My Content folder:

![Save as dialog box](image)

6. Navigate to the saved report view and click the more icon.

![More menu](image)

7. Click Properties.
8. Click Schedule.

9. Click the New icon.
10. Select how frequently you would like to schedule the report.

11. Select when and how often you’d like to receive the report.
12. Use the format section to select the type of format you would like to receive the report in. Click the arrow icon next to format type.

![Image of format selection](myUFL_Enterprise_Analytics.png)

13. Check the box next to format type you would like to receive.

![Image of format choice](myUFL_Enterprise_Analytics.png)
14. Click **Done**.

![Image of myUFL Enterprise Analytics interface showing the Create schedule and Delivery sections]

15. Use the Delivery section to select the how you would like to receive the report in. Click the **arrow icon** next to delivery.
16. To receive your report via email, click box the next to Send report by email.

17. Enter the recipient’s email address.
18. **A best practice is to send the report as a link** rather than as an attachment to ensure that the recipient has permissions to view the data. The recipient will have to log into Enterprise Analytics. Gatorlink will authenticate their permissions.

19. If you have prompts in the report, click **Set values** to set the prompts for the recipient.
20. Click Set.

21. Click Create.

22. The schedule confirmation message displays. Make sure that Schedule is set to enable.