Powerplay – Fit Cube

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It is a helpful tutorial on creating reports for your unit. In order to get a better understanding, please attend the training course **PST117 Reporting: PowerPlay** offered by HR.

There are also helpful instruction guides and web simulations offered by HR on their website:
http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/powerplay.

Let's begin. Log onto myUFL, and use the following navigation: **Main Menu > Enterprise Reporting > Access Reporting.** A new window will open for Enterprise Reporting also known as PowerPlay Web Explorer.
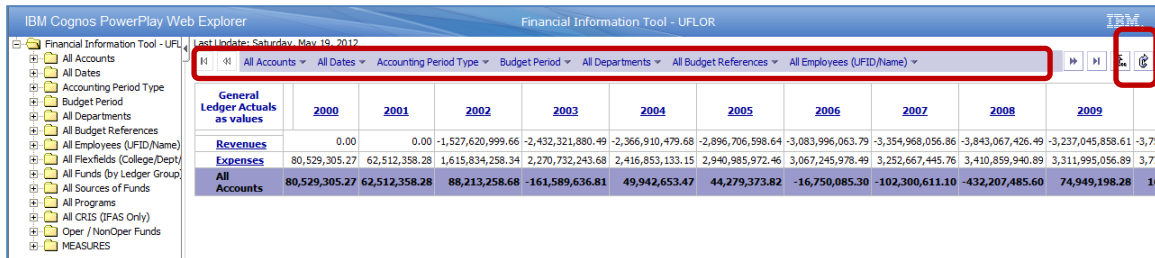
Use the following navigation: **Public Folders > Financial Information > Financial Information Tool > UFLOR** to access Financial Information Tool
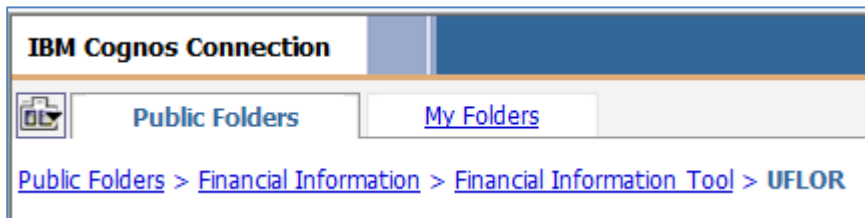
Click on Financial Information Tool - UFLOR

The PowerPlay Web Explorer window will open. Throughout this helpful tutorial, you will notice the Dimension line at the top of the page. This is the blue shaded area. Click on the "Wrapping On" icon to expand the information listed on the Dimension line.

Listed below, you will see the information currently listed on the Dimension line prior to searching for the specific financial information for your Department.

Last Update: Tuesday, May 22, 2012

| All Accounts ▾ | All Dates ▾ | Accounting Period Type ▾ | Budget Period ▾ | All Departments ▾ | All Budget References ▾ | All Employees (UFID/Name) ▾ |
| All Flexfields (College/Dept/Flex) ▾ | All Funds (by Ledger Group) ▾ | All Sources of Funds ▾ | All Programs ▾ | All CRIS (IFAS Only) ▾ | Oper / NonOper Funds ▾ | MEASURES ▾ |

| General Ledger Actuals as values	2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	
Revenues	0.00	0.00	-1,527,620,999.66	-2,432,321,880.49	-2,366,910,479.68	-2,896,706,598.64	-3,083,996,063.79	-3,354,968,056.86	-3,843,067,426.49	-3,237,045,858.61	-3,75
Expenses	80,529,305.27	62,512,358.28	1,615,834,258.34	2,270,732,243.68	2,416,853,133.15	2,940,985,972.46	3,067,245,978.49	3,252,667,445.76	3,410,859,940.89	3,311,995,056.89	3,77
All Accounts	**80,529,305.27**	**62,512,358.28**	**88,213,258.68**	**-161,589,636.81**	**49,942,653.47**	**44,279,373.82**	**-16,750,085.30**	**-102,300,611.10**	**-432,207,485.60**	**74,949,198.28**	**1(**

To specify your chartfield or other specific data for the report, click on the arrow next to the question mark "?" at the bottom of the page.


Click the "Find" button next to the binocular to open the dialog box.
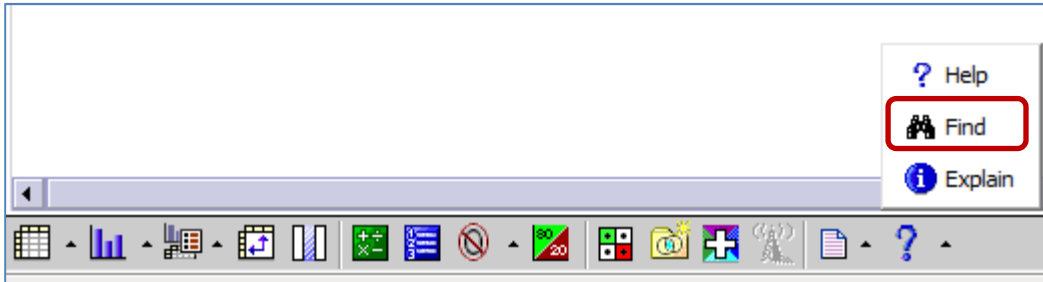
In the "Find" dialog box, you will be able to search for the specific Department ID. For this example, you are going to search for the financial activity of the GBAS Shared Services Center. In the field next to the "Contains", enter the Department ID for the GBAS Shared Services Center, 64300100. {Remember, you can search for financial information for your department.} Pay special attention to the category title "Position" for this next step.
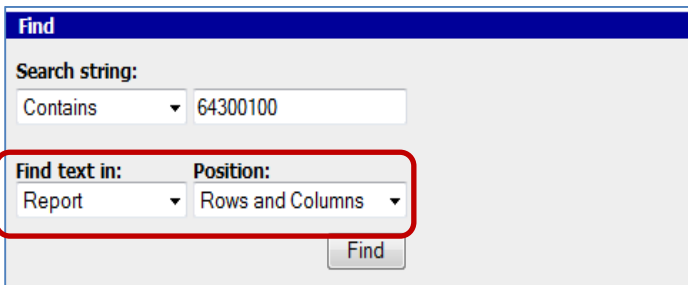

In the "Find text in", always select Cube. You will notice the category title "Position" has changed to the category title "Dimension". In the dropdown menu under the category title "Dimensions", select "All Departments" and click Find.
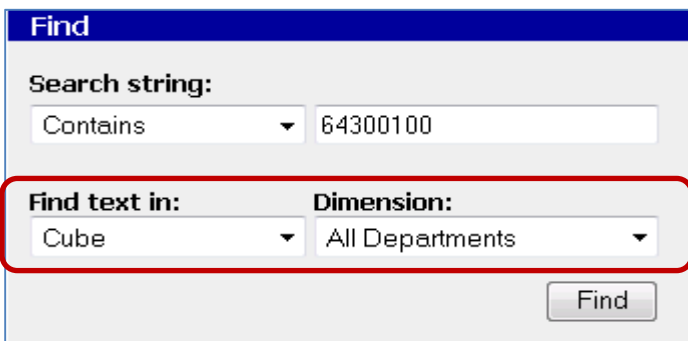
In the dialog box, the Department and path or navigation to the department will be listed in yellow on the right side. Select Filter. You will notice on the Dimension line, the GBAS Shared Services Center Department ID is listed.
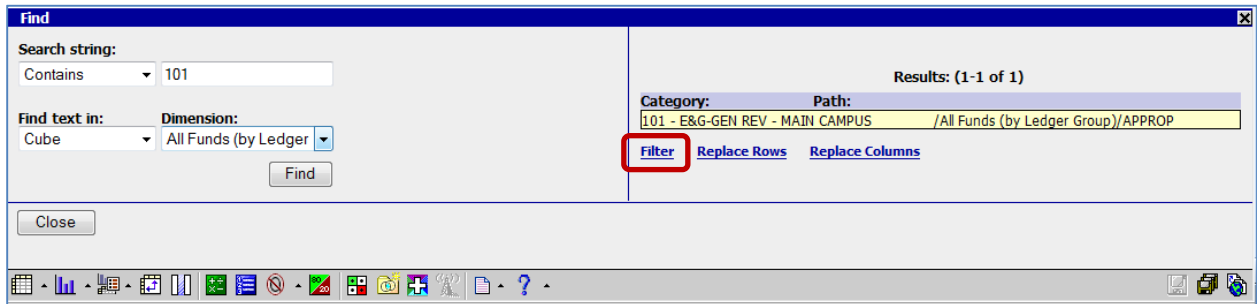
Results in Yellow
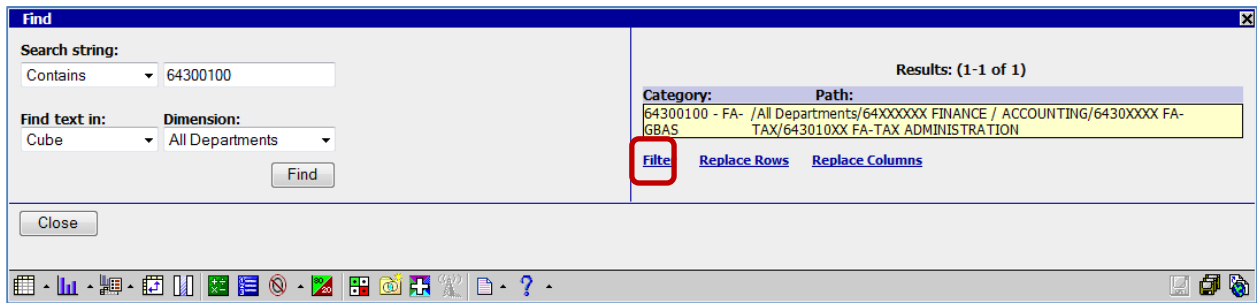
Dimension line lists the search results after "filter" is selected, confirming the selection
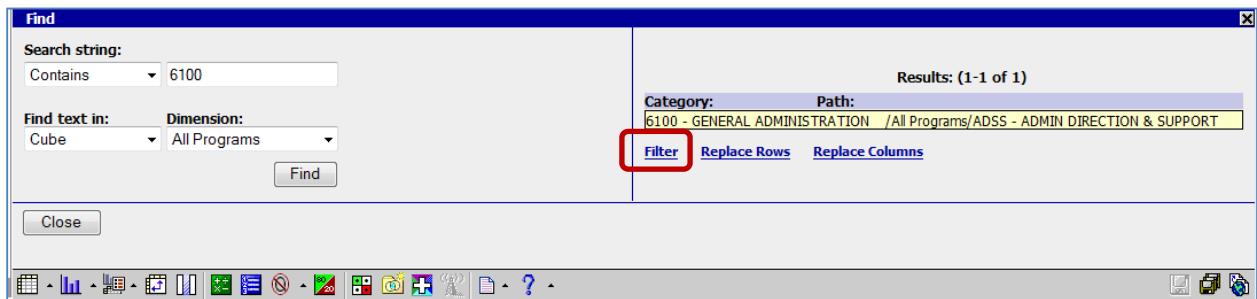

Next, enter the Fund code for the Department. For this example, enter 101 in the field next to Contains in the Find dialog box. In the dropdown menu under the category title "Dimensions", select "All Funds (by Ledger Group)" and click Find.

Again, in the dialog box, the Fund code and path or navigation will be listed in yellow on the right side. Select Filter. On the Dimension line, the Department ID and Fund code are listed.
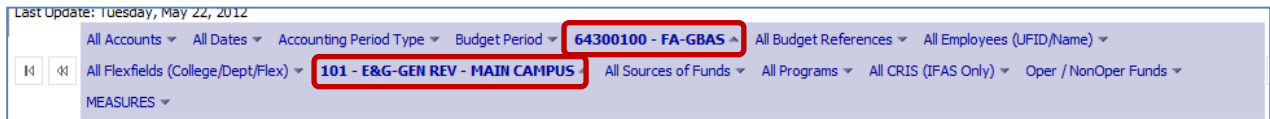
Finally, enter the Program code for the Department. For this example, enter 6100 in the field next to Contains in the Find dialog box. In the dropdown menu under the category title "Dimensions", select "All Programs" and click Find.

You will notice in the dialog box, the Program code and path or navigation will be listed in yellow on the right side. Select Filter.

On the Dimension line, the Department ID, Fund code and Program Code are listed.

Click the X or icon to close the Find dialog box.

Select the **_date range_** for the report. This report will capture all data year to date for the fiscal year. On the Dimension line shaded in blue at the top, click the dropdown menu next to "All Dates" and scroll down to "YTD" (or year to date).

This is the skeleton template so the report can be run at any time to retrieve year to date data. To save this report template, in the bottom right hand corner on the taskbar, click the Save As icon (or icon with the multiple floppy disks).

Enter the Name of your report. For this example, the Name of your report and Screen tip should be the same. _{Best Practice: Do not remove the Description that is auto-populated as recommended by Enterprise Reporting. Feel free to add to it.}_ Click the "Select My Folders" hyperlink as the Location and click OK. This report will be saved in your folder for future reference.

To view the report, you will return to the main PowerPlay Web Explorer menu by clicking on the "Return to Source" icon (or the globe icon listed on the bottom of the taskbar).

Click on "My Folder". You will see the report that you have created for this example.   You can set up as many report templates as you would like in My Folders, and then run them at any time. Because you have selected "YTD", each time you run a report you will have the most up to date "year to date" information.
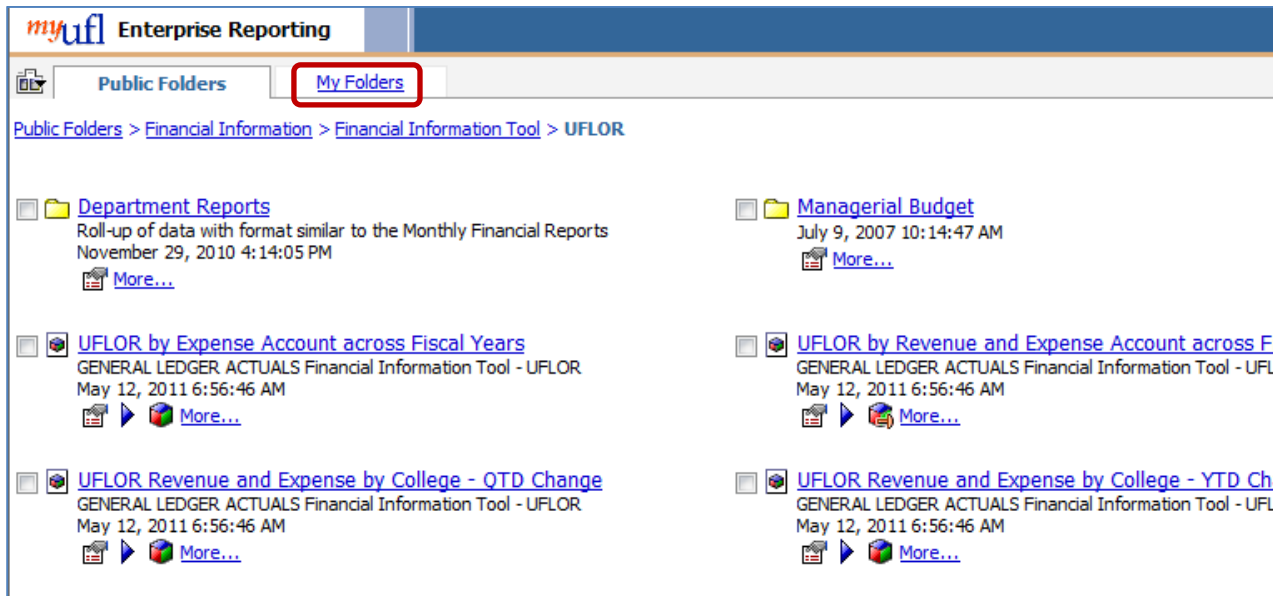
You can also create personal folders for your reports, by clicking on the "New Folder"icon. Make sure you are still on the "My Folders" tab.
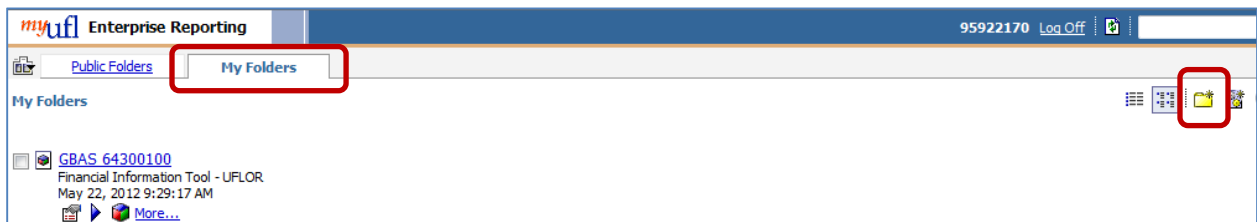
Enter the Name for the folder. For this example, enter "Reports for the SSC". Entering s Screen tip is optional and not required. Click Finish.

Under the My Folders tab, both the report name and the folder you created are listed or shown on the screen. To move the report in the folder, click the box next to the report.

Click the "Cut" icon.
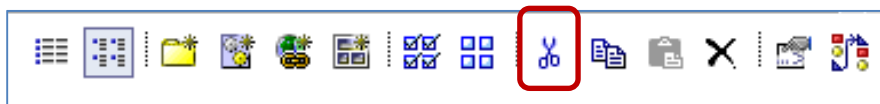
Click the folder. For this example, click the "Reports for the SSC" folder. Click the "Paste" icon.
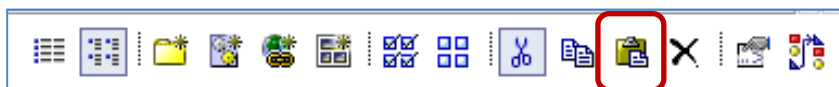
Now, the report is saved/moved within the "Reports for SSC" folder. You would repeat this procedures for other reports you would like to move in the folder.

If you want to view the information on this report, click on the report name. For this example, the report name is "GBAS 64300100". It will take you back to the PowerPlay Web Explorer window with the information for your department listed on the Dimension line.
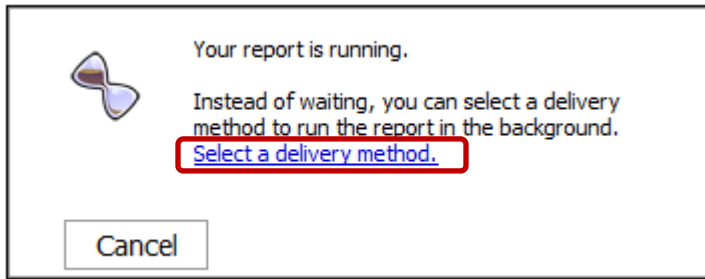

To retrieve data for the report

"Drill Through" retrieves the most up to date detail data for the report. On the bottom of the taskbar, click the "Drill Through" icon, which looks like a cross on a stain glass window.
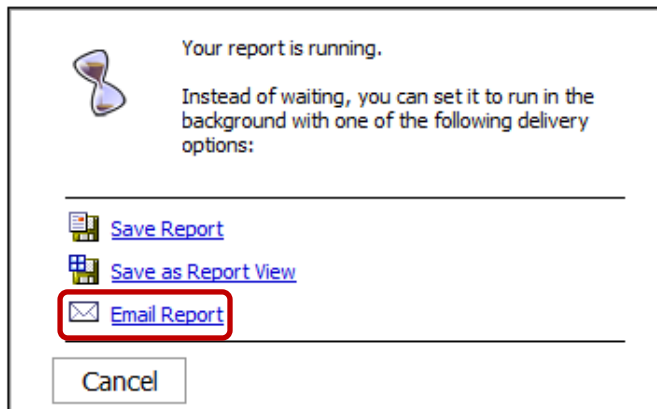

Click the "Source Transaction Detail – UFLOR" hyperlink (or whatever drill through category you need) and click OK on the next screen.

When you see the dialog box, click on "Select a delivery method" hyperlink. {For this example, again the report will be send via email.}

Your report is running.

Instead of waiting, you can select a delivery method to run the report in the background.
Select a delivery method.

Cancel

Click the "Email Report" hyperlink.

Your report is running.

Instead of waiting, you can set it to run in the background with one of the following delivery options:

Save Report

Save as Report View

Email Report

Cancel

Your UFID will auto-populate. This report can be emailed to multiple recipients by entering his/her email address or UFID. Click OK, and the report will be emailed to you in Excel format. You can then modify the report as needed.

Set the email options - Source Transaction Detail - UFLOR   Help   X

Specify the recipients and contents of the email. To add recipients, click Select the recipients or type the email addresses separated by semi-colons. To include an HTML report as the message body, leave the Body box empty and select the report as the only attachment.

To:
95922170 (95922170);hallc@ufl.edu

Cc:
ageiger0213@ufl.edu

Select the recipients...   Show Bcc

Subject:
Report: Source Transaction Detail - UFLOR

Body: Change to plain text »   B I U

This is a sample report for the instruction guide.

☑ Attach the report

OK   Cancel