PST910 Enterprise Reporting Basics

Classroom Handout

For updated Instruction Guides visit the

myuflToolkits

http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits

Overall Goals

- To make your job easier!
- To demonstrate the reports in myUFL you can use to analyze your operation and make better business decisions

Learning Objectives

By the end of class, you should be able to:

- Explain UF's overall data/reporting framework
- Recognize the various reporting tools available to you
- Define key reporting-related terms
- Organize reports using folders, portal tabs, and the reorder list button
- Execute delivered and prompted reports for finance and HR
- Export reports in various formats (excel, csv., pdf, and html)
- Send automated reports by setting prompts and scheduling email delivery
- Identify the necessary security roles for accessing the reports you need
- Employee best practices for running reports in Enterprise Reporting
- Leverage available help resources for reporting

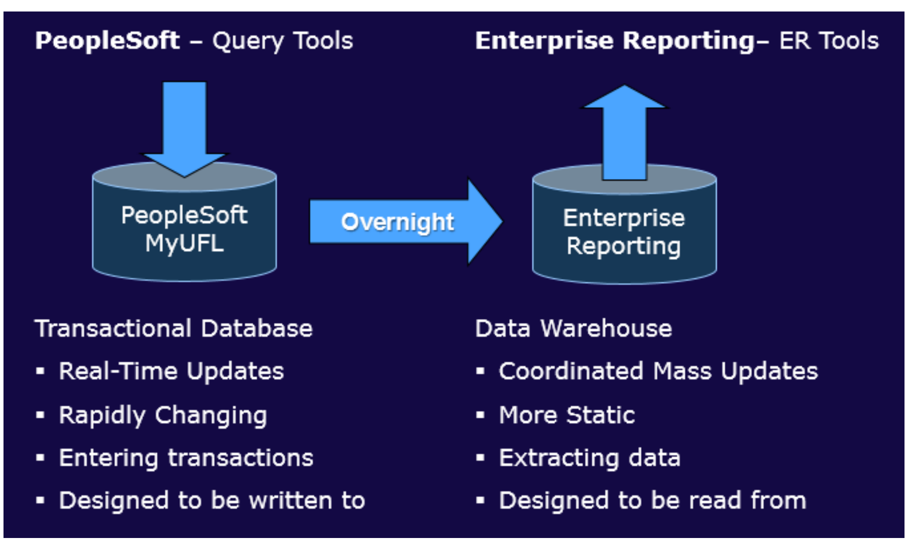
Data In = Data Out

Examples of data entry:

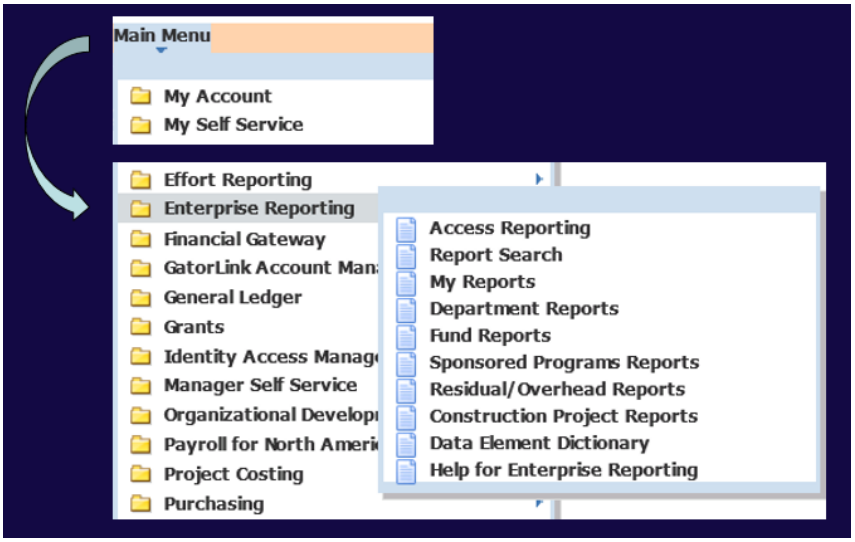
- PCard Charges
- Purchase Orders
- Vouchers
- Journal Entries
- Travel Authorizations and Expense Reports
- ePAF
- Pay Cycle Information
- Payroll Distribution Information

Enterprise Reporting reflects whatever data is entered in myUFL. It does not fix mistakes.

Framework



Enterprise Reporting Navigation



Department Reports – MFR – Prompted

- Delivered (pre-built) for prior months
- Prompted – you choose the filters

myufl

Appropriations Summary
PH-PHARMTHERAPY TRNSL RSCH
For Month Ending: December 31, 2014

Run Date: 01/09/2015

	YTD Budget	Open Encumbrances	YTD Expenses	Available Balance	MTD Budget	MTD Expenses
Cost Center: 32060000~101~CRRNT (Department~Fund~Budget Reference)						
Personnel Expenses						
600000 SALARY EXP (4) - BUDGET ONLY		0.00	0.00		$0.00	$0.00
Subtotal Salary Budget		$0.00	$0.00		$0.00	$0.00
Subtotal Salary Expenses	$572.00	$0.00	$0.00	$572.00	$0.00	$0.00
Subtotal Personnel Expenses	$572.00	$0.00	$0.00	$572.00	$0.00	$0.00
Other Operating Expenses						
700000 OTHER EXP (4) - BUDGET ONLY		0.00	0.00		$0.00	$0.00
Subtotal All Expense Budget		$0.00	$0.00		$0.00	$0.00
Subtotal Other Operating Expenses	$500.00	$0.00	$0.00	$500.00	$0.00	$0.00
Subtotal Other Operating Expenses	$500.00	$0.00	$0.00	$500.00	$0.00	$0.00
Total 32060000~101~CRRNT (Department~Fund~Budget Reference)	$1,072.00	$0.00	$0.00	$1,072.00	$0.00	$0.00

Exercises: Running Department Reports

1. **Main Menu > Enterprise Reporting > Department Reports >**
   19000000 COLLEGE-ENGINEERING > 19010000 EG-ENGINEERING ADMINISTRATION

   Run an Appropriations Summary report for March 2015. (Use the PDF option.) What is the available balance for other operating expenses?

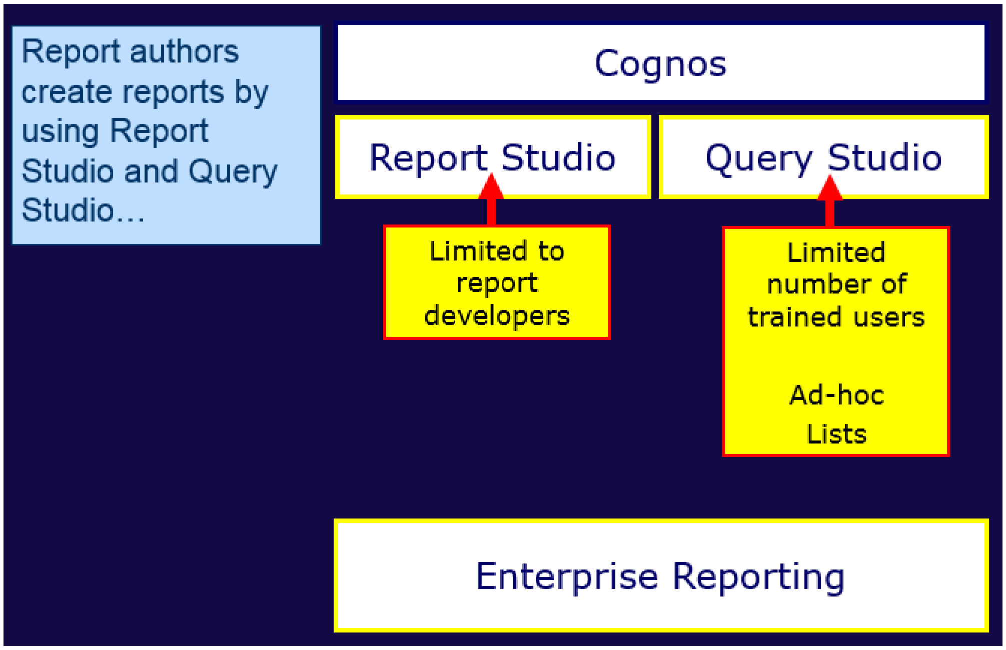
2. **Main Menu > Enterprise Reporting > Department Reports >**
   28000000 COLLEGE-VETERINARY MED > 28010000 VM-DEAN S OFFICE

   Run an Open Encumbrance Summary for March 2015. (Use the PDF option.) What is the subtotal for 734260 ELECTRONIC DATA/SUBSCRIPTIONS?

3. **Main Menu > Enterprise Reporting > Department Reports >**
   Use your own department. Pick your own date range.

   Run an appropriations summary for your own department and record an interesting piece of information below.

How Reports Get Built



Enterprise Reporting Tools

- **Published Reports (Pre-made by Data Services)**
  - Types: Delivered vs. Prompted
    - Delivered: Already generated and retrieved quickly
    - Prompted: You specify what you want to see
      - Prompted for information
      - Must fill in the blanks BEFORE running the report
  - Examples: Monthly Financial Reports, Payroll reports, etc.

- **Ad-hoc Reporting**
  - You build your own from raw data
  - Query Studio: make your own report

- **FIT (Financial Information Tool) Cubes**
  - Can view Life-to-Date, Year-to-Date, and Month-to-Date easily
  - Allows year over year analysis and trending

- **myinvestiGator**
  - User friendly view of research data for Sponsored Researchers ("PIs") and research staff

- **ODBC "warehouse"**
  - Warning! Highly tech skills needed!
  - Low-level access to "raw" data

Published (or "Premade") Reports

- Department Reports for prior month
  - Summary
  - Transaction Detail
  - Projected Payroll
  - Payroll Recon
  - KK to GL
  - Grants and PI Summary
  - Open Encumbrance

Ad-hoc Reporting

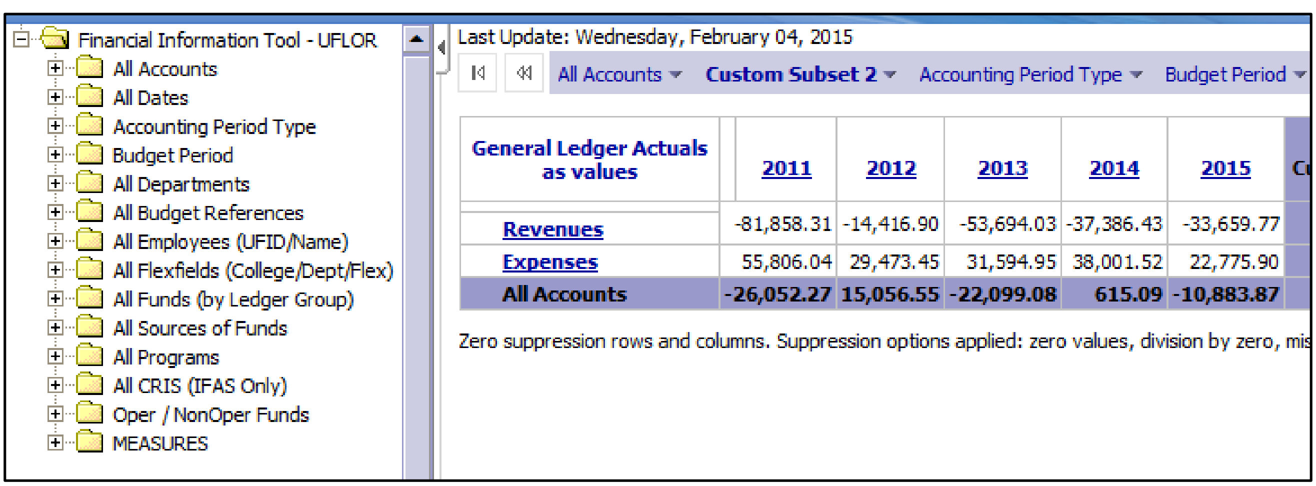
- You build your own from raw data
- Have it your way!
- You pick only the categories you want
- Query Studio

DeptID: 32060000 AND Apprv Date: On or after Jan 1, 2015

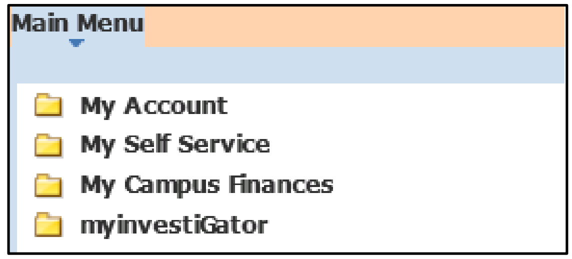
DeptID	Cardholder UFID	Approved by UFID	PCard Transaction Amount
32060000	10461854	50213550	308
32060000	11024310	50213550	1,191.89
32060000	15548090	50213550	686.5
32060000	19179049	50213550	9.8
32060000	33335650	50213550	186.28
32060000	54342290	50213550	190
32060000	55100174	50213550	332.55
32060000	56714186	50213550	477.04
32060000	57292630	50213550	65.98
32060000	59622840	50213550	1,211.86
32060000	70962580	50213550	2,224.93
32060000	85407396	50213550	724.11
32060000	88135330	50213550	230.37
32060000	96886060	50213550	89.76
Summary			**7,929.07**

Cubes (FIT Cubes – Powerplay)

- Extremely powerful and flexible!
- Have it your way!
- You pick only the level of detail you want

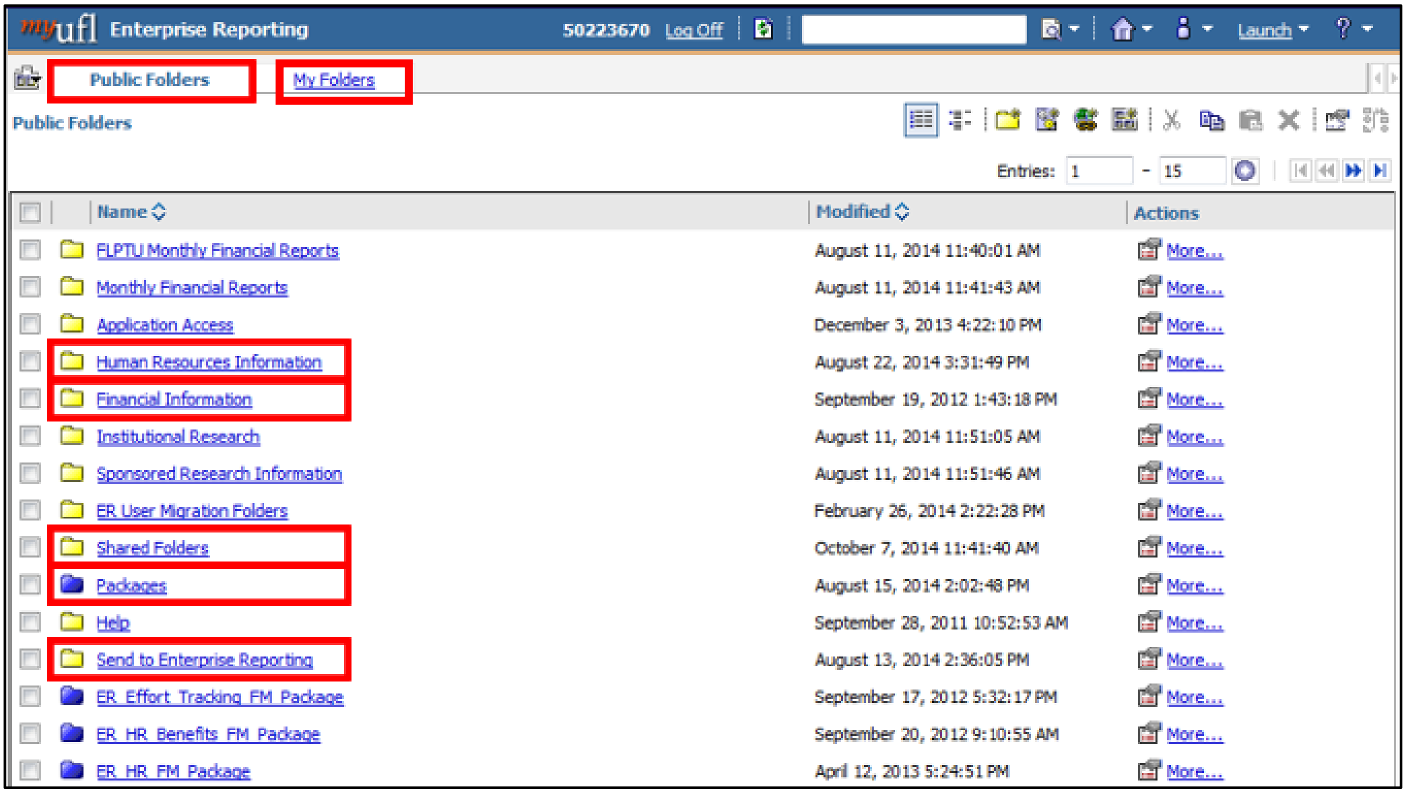


myInvestigator



- myInvestigator – same PeopleSoft data, just put in an easy to read format
- Shows transactions on grants and research related accounts
- Great for PIs, research staff, and anyone who reviews research data

Enterprise Reporting Interface



- **Public Folders:** This is the default home page within Enterprise Reporting (ER). This area includes various reports that are available to anyone who has access to ER. The content is grouped in various folders.
- **My Folders:** Use the My Folders tab to store and organize your favorite reporting content.
- **Human Resources Information:** Within this folder, you'll find various delivered (i.e. "already published") and prompted reports related to HR topics such as payroll, leave, affirmative action, effort reporting, effort tracking, letter of appointment waivers, payable time, etc.
- **Financial Information:** This folder contains delivered and prompted reports on financial topics such as annual financial reports, budget, direct support organizations (DSOs), expense/travel, purchasing, etc. This folder also contains the Financial Information Tool (or FIT Cube). Using the FIT Cube, you can "rotate" and analyze financial data from various perspectives such as life-to-date, year-to-date, month-to-date, etc.
- **Shared Folders:** If you create your own reports using Query Studio and want to share them with campus, you can do so via the Shared Folders area. NOTE: Only those who complete PST912 Query Studio can use the Query Studio

tool. Sharing your creations via this folder also requires completing the “Shared Folder Request Form” available on the Query Studio toolkit.

- **Packages:** All reporting objects within Enterprise Reporting use “data packages,” which tell Enterprise Reporting how the warehouse data is organized and enforce security rules to prevent unauthorized access.
- **Send to Enterprise Reporting:** Enterprise Systems often collaborates with other developers on campus or works with customers who are trying to build their own query studio report. This folder is designated for this type of collaboration/support.

Report Viewer Toolbar

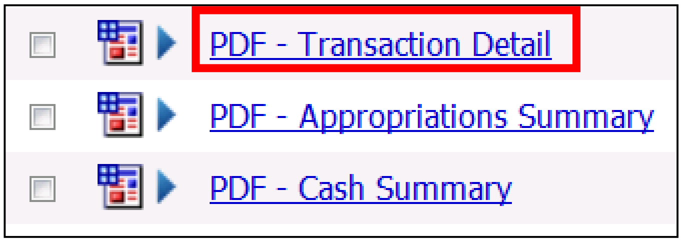
A B C D E F G H I J K L

A. **List View:** Show the entries in a list format
B. **Details View:** Shows the details for entries in the folder
C. **Create a New Folder:** Create folders to organize shortcuts, report views and URLs
D. **Create a New Job:** You can set the same schedule for multiple entries by creating a job. A job identifies a collection of reports, report views, and other jobs that are scheduled together and share the same schedule settings. When a scheduled job runs, all the entries in the job run.
E. **Create a URL:** Create URLs to keep the files and Web sites you use most frequently at your fingertips. Clicking a URL opens the file or Web site in the browser. After opening a URL, click the back button in your browser to return to the portal.
F. **Create a Tab:** Customize your portal be creating your own portal pages; choose from different types of content and organize them in a way that works for you
G. **Cut:** Cut the selected entries
H. **Copy:** Copy the selected entries
I. **Paste:** Paste the clipboard contents to the current location
J. **Delete:** Delete the selected entries
K. **Set Properties:** Show and set properties for the current folder. Personalize the way data appears in the portal by changing the preferences here. Changes take effect immediately in the current session.
L. **Order:** Specify the order of the folders and entries in the portal. Organize the entries by level or usage. Please entries that you use daily at the top of the list. By default, the entries are alphabetical. In YOUR FOLDER, YOU DECIDE.

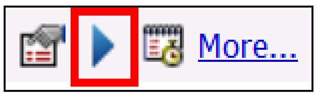
How to Run a Report

There are two ways to run a report:

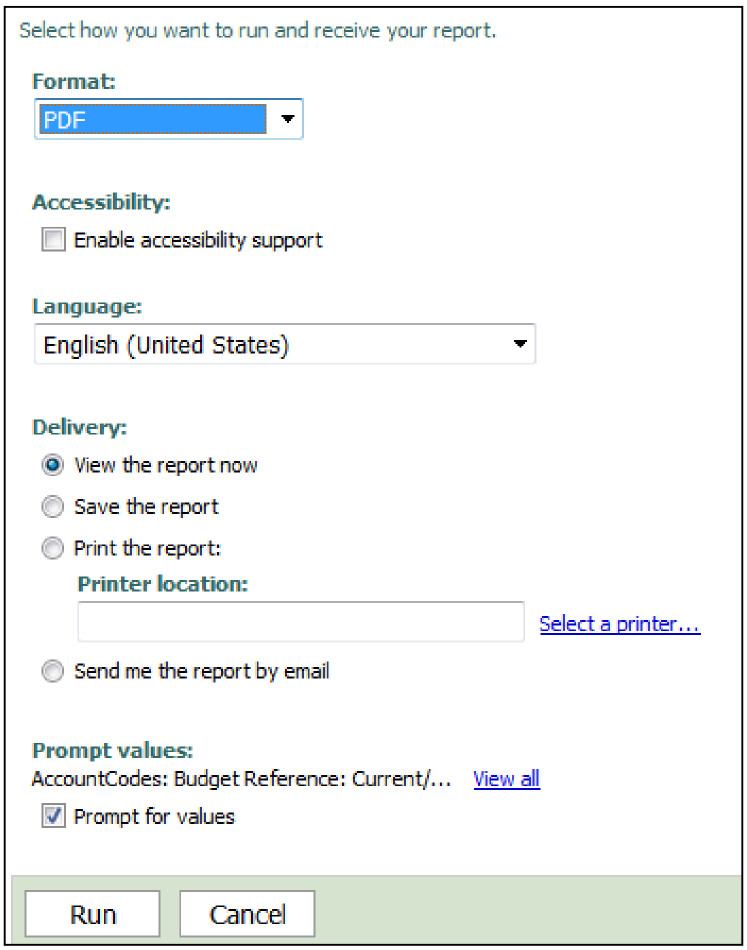
- Click on the report title



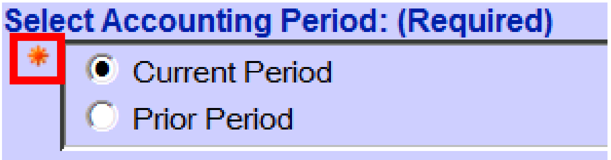
- Or click on the “Play” button to the right



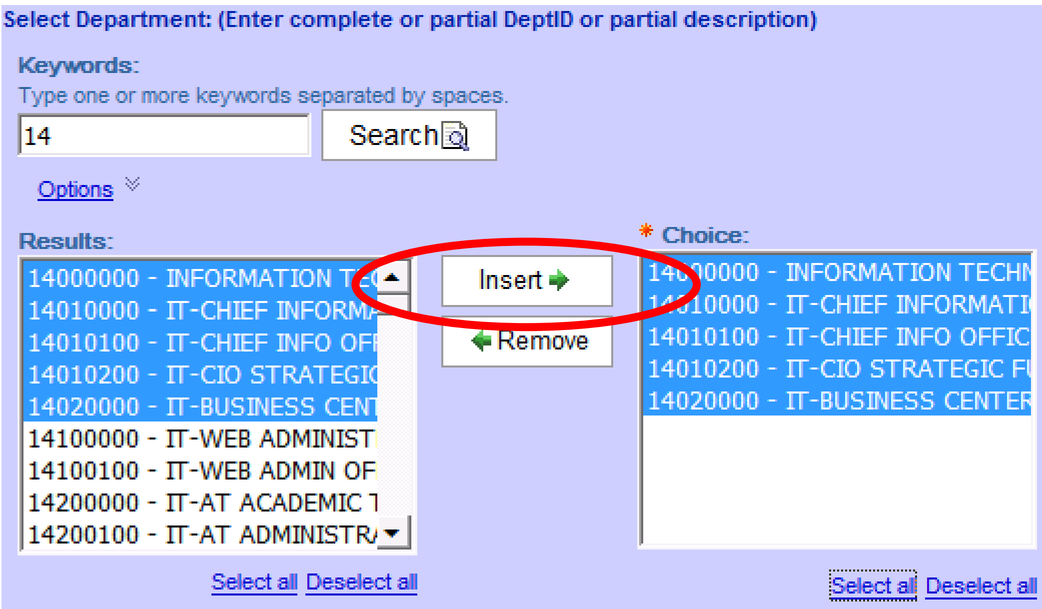
NOTE: If you click the Play button, you will see the following options:



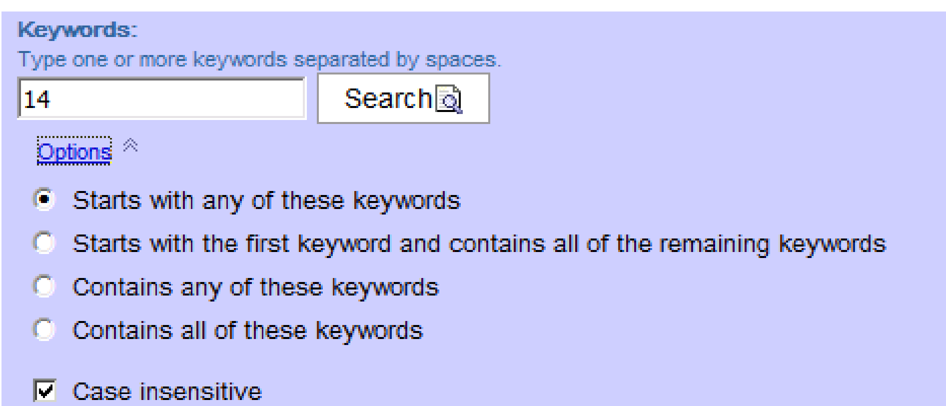
Next enter the required prompts (denoted by red asterisk and sometimes a red underline).



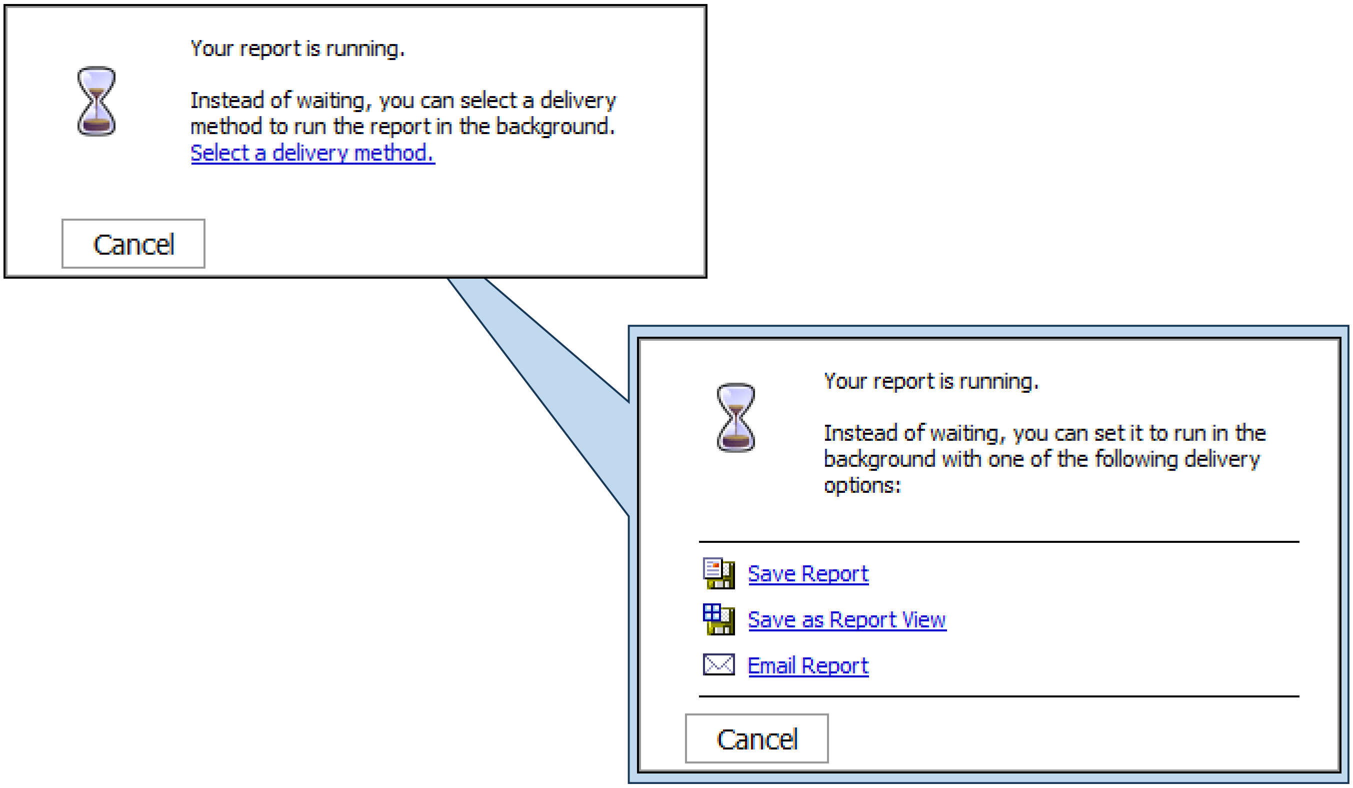
Use search and select prompts to narrow your search.



Optional: Use Options when running a keyword search.



Select a Delivery Method



Exercise: Running a Prompted Report

For this exercise, you will run a PCard Detail by Business Unit report.

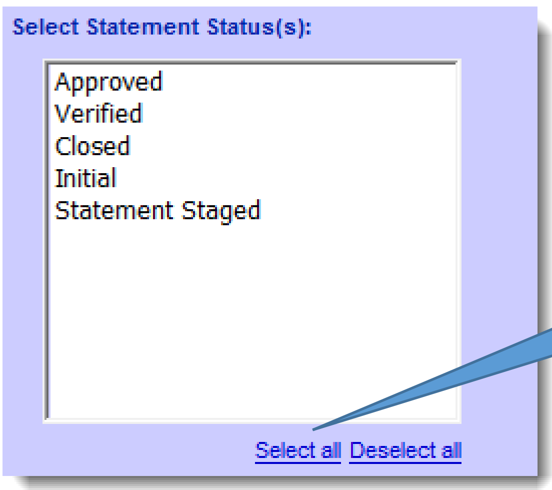
1. Navigate to Public Folders > Financial Information > Purchasing > PCard Detail by Business Unit.

2. Enter your 4-Digit PO Business Unit Code. If you don't know it, enter any of the following: 3201, 6201, or 1802.

3. For Accounting Period, enter any number 1-12.

4. For Fiscal Year, enter 2012, 2013, or 2014.

5. For Statement Status(s), do not select anything. This will produce a report that includes *all* statuses listed.



NOTE: To generate a report showing all statuses, you *could* click "Select All" as well. However, results will take longer to process by doing this.

6. Click Finish to run the report. You should be taken to a screen that looks similar to this:

Keep this version | Add this report

my ufl

P-Card Detail by Business Unit

Run Date: 05/21/2015

Report Selection Criteria: Department Code = 3201 Accounting Period = 10 Fiscal Year = 2013

Business Unit: 3201

Department Financials: 32010000 – PH-OFFICE OF THE DEAN

Budget Reference: CRRNT – CURRENT BUDGET

Fund: 171 – TFRS FR COMPONENTS

Project: - - NA
Source of Funds: F004253 - Pharmacy Jax Program
Department Flex: 3200JX - JAXDCEE
Program: 4600 - ACADEMIC ADMINISTRATION
Account: 799400 - FOOD & BEVERAGES HUMAN CONSUMP

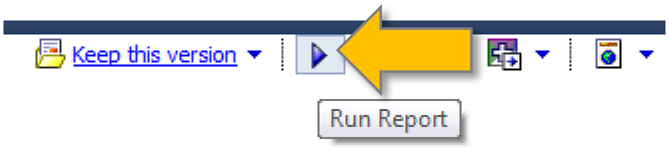
Employee: 66672763 – Greenaway,Analyn

Line #	Dist #	Trans Date	Billing Date	Trans #	Merchant	Reference #	Line Item	Invoice Number	Voucher ID	Statement Status	Merch Amount	CRIS Code	Empl ID Chartfield
172	1	04/03/2013	04/08/2013	TXN02307902	PUBLIX STORE CHARGE #9997	24445003093300250670980	Refreshments,StudentEvent,Jax	2013_04_12_00000000000690	04052630	Closed	$24.84	-	-
849	1	04/15/2013	04/18/2013	TXN02322446	PUBLIX STORE CHARGE #9997	24445003105300258589188	Refreshments,JacksonvilleCampus,Events	2013_04_23_00000000000479	04063791	Closed	$99.55	-	-
849	2	04/15/2013	04/18/2013	TXN02322446	PUBLIX STORE CHARGE #9997	24445003105300258589188	Refreshments,JacksonvilleCampus,Events	2013_04_23_00000000000479	04063791	Closed	$45.98	-	-

Total Employee: 66672763 – Greenaway,Analyn $170.37

Total Account: 799400 – FOOD & BEVERAGES HUMAN CONSUMP $170.37

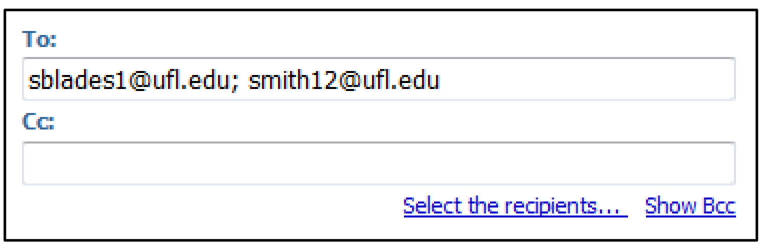
7. If the report that appears is blank, this means there is no data to return according to the prompts you entered. Click the **Run Report** button to the previous page and enter new prompts.



Exercise: Emailing a Link to the Report

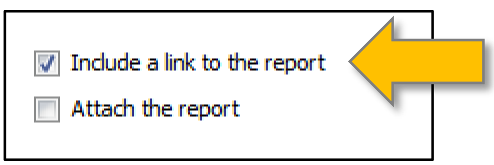
1. Click the **Keep this version** link. Then click **Email Report**.

2. Enter email addresses in the provided fields. Separate email addresses by semicolon.



3. Enter a subject and body for the message.

4. **Best Practice Alert**: Use the option to **Include a link to the report**. This is a security message to ensure only employees with appropriate system access will be able to view the report. If you attach the report, there is always the possibility that the report could end up the wrong hands (either by your own error or by someone forwarding your message).

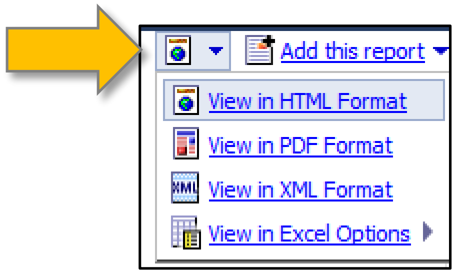


5. Click **OK** to send the message.

Exercise: Downloading a Copy of the Report

After running a report, you can also download a PDF or Excel version (for example).

1. Click the **View in HTML Format** icon to see additional file types.

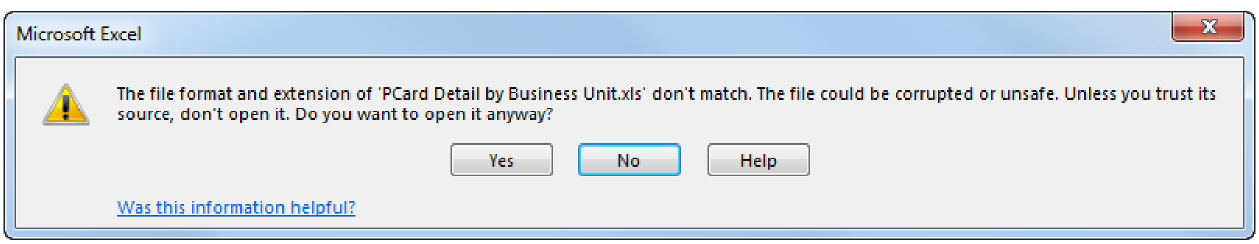


2. Click **View in Excel Options** > **View in CSV Format**.

3. You should be prompted to Open or Save the file. Click **Save As**.

4. Enter a name for your file and save it to a location on your computer.

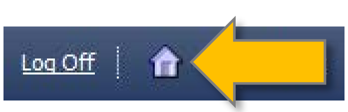
5. Open the file to view it. If you are presented with the following dialog box, simply click Yes.



Exercise: Creating a Report View and Setting Prompts

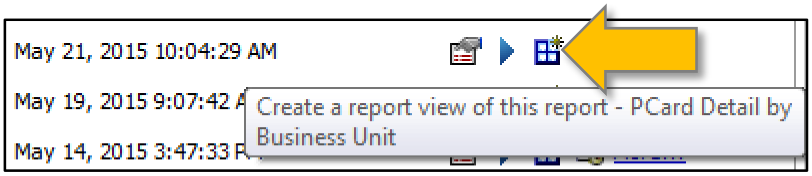
Let's interact with the PCard Detail by Business Unit report in a different way. In this example, you'll create a Report View in your My Folders area. You'll also set the prompts in advance so that every time you run the report, it will filter for the information you selected.

1. Within Enterprise Reporting, return to the **Public Folders** area. You may need to click the Home icon at the top of your screen.



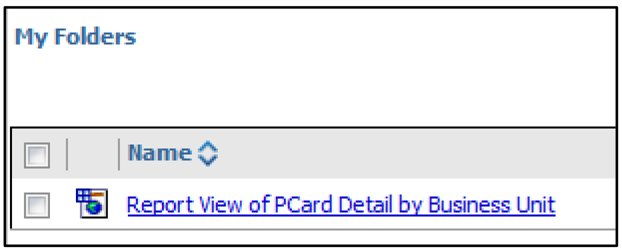
2. Navigate to Public Folders > Financial Information > Purchasing

3. Click the **Create a report view of this report** icon next to the PCard Detail by Business Unit link.

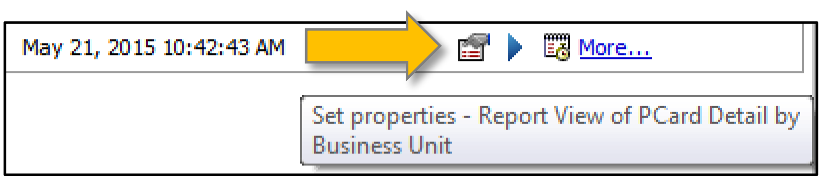


4. Click the **Select My Folders** link. Then click the **Finish** link.

5. Click the **My Folders** tab at the top of the screen. You have now created a view of the PCard by Business Unit report.



6. Now let's set the properties for the report view, so it will filter for the information you selected each time you run it. To the right of the report view link, click the **Set properties** icon.



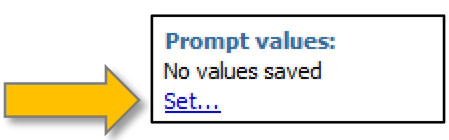
7. Click the **Report view** link at the top of the page.

8. Click the **Default action** dropdown menu. Select **Run the report**.

9. Click the **Override the default values** option. Select the **Format** dropdown menu and select **PDF**.

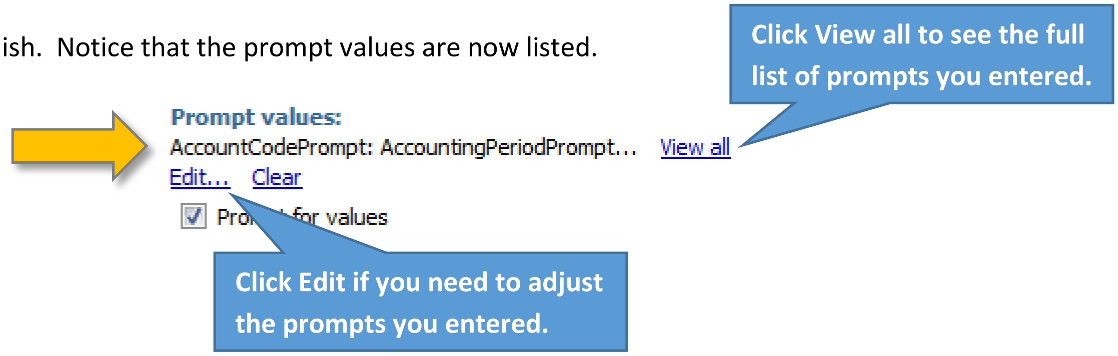
10. Under the Prompt Values section, notice that it says "No values saved." Let's enter some prompts and save them, so you won't have to do it every time!

11. Click the **Set** link. This is where you will set the prompts for this report.



12. Enter the following prompts:
    - 4-Digit PO Business Unit Code: 6201
    - Fiscal Year: present year

13. Click Finish. Notice that the prompt values are now listed.



14. Click the **Prompt for values** option to remove the check. This will prevent the system from prompting you for new values every time you run the report. Instead the system will remember the prompts you entered and give you what you asked for the first time!

15. Click the **OK.**

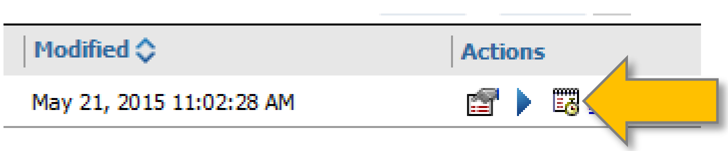
16. Now click the **Report View of PCard Detail by Business Unit** link. You will automatically receive the report without additional prompting.

Exercise: Scheduling an Email for a Report View

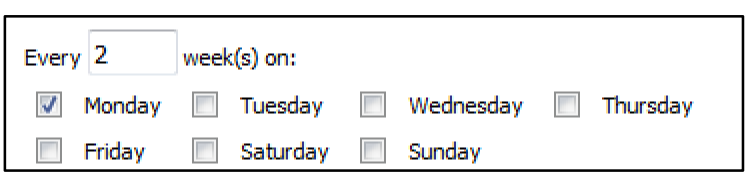
With email scheduling, you won't even need to access Enterprise Reporting. By creating a report view and setting an email schedule, you'll get reports delivered directly to your inbox.

1. Return to your My Folders area.

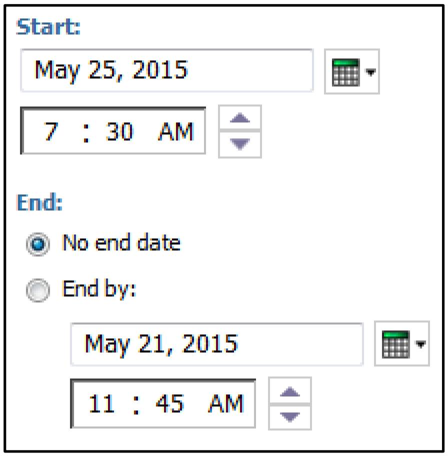
2. Next to the Report View of PCard Detail by Business Unit, click the Schedule icon.



3. Establish a frequency for the report. For example, you might decide to schedule the report to be sent to you every 2 weeks on Monday at 7:30 a.m.



4. Establish a start date/time and end date/time.

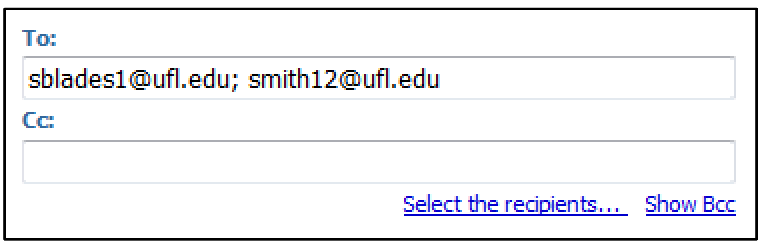


5. Click the **Override the default values** option.

6. Select the file type(s) you want for the report (for example, PDF and CSV).

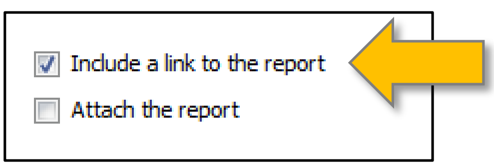
7. Click the **Send a link to the report by email** option. Then click the **Edit the options** link.

8. Enter email addresses in the provided fields. Separate email addresses by semicolon.



9. Enter a subject and body for the message.

10. **Best Practice Reminder**: Use the option to **Include a link to the report**. Use the **Attach the report** feature with caution.



11. Click **OK**. Then click **OK** again.

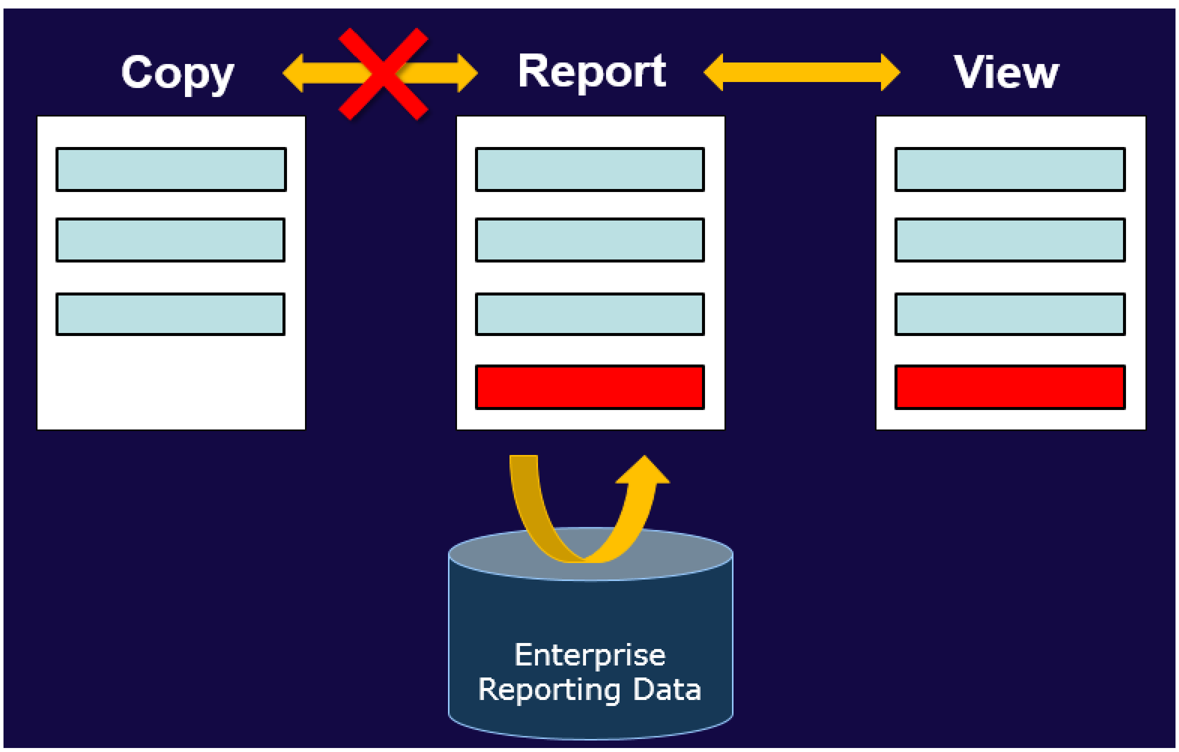
    The report will now be delivered via email by the specifications you entered.

Recap: Enterprise Reporting is designed to make your life easier.

Challenge	Solution
I'd really like to run a report and then dump the data into Excel to manipulate it.	Enterprise Reporting allows you to download reports in a number of formats such as Excel and PDF.
The reports I use on a regular basis are hard to find within Enterprise Reporting.	Save your favorite reports as Report Views in your My Folders area.
I don't like having to fill in a bunch of prompts every time I want to run a report.	Within your Report View, you can set your prompts and then disable the "Prompt for values" feature. This will allow your report to run without you having to enter the prompts every time.
It would be great if Enterprise Reporting could just send me the reports I need.	You can schedule reports for delivery to your email address (or any email addresses for that matter).

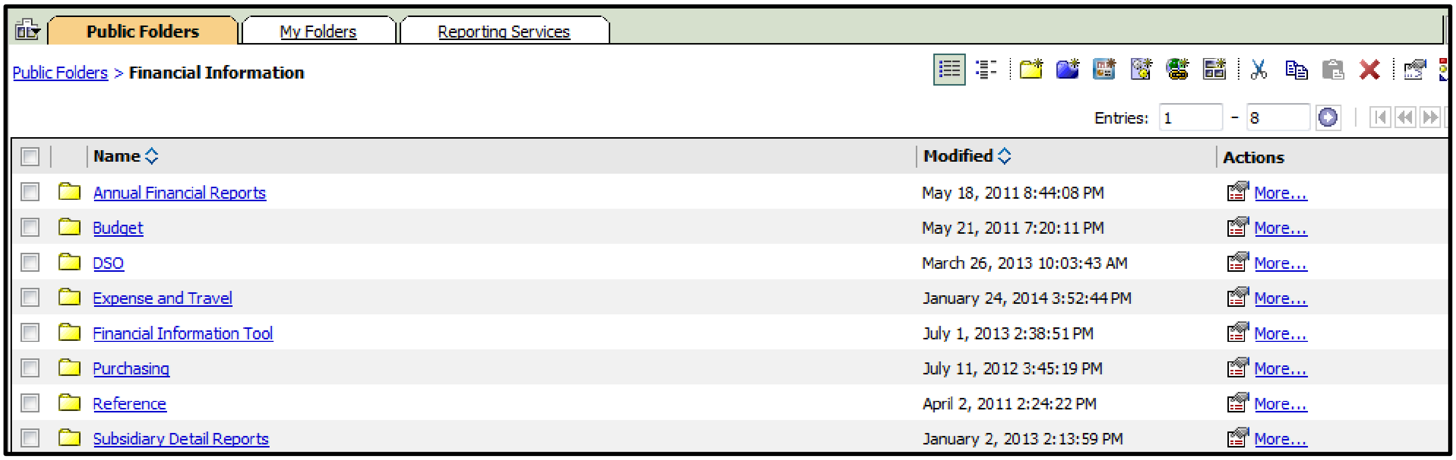
For additional information on how to run a report view, set prompts, and schedule email delivery, visit the Enterprise Reporting Basics toolkit: http://hr.ufl.edu/learn-grow/just-in-time-training/myufl-toolkits/enterprise-reporting-basics/.

Save a Report: Copy vs. Report View



Best Practice: Save a report as a "Report View" in your My Folders area. This will maintain your connection to the version of the report that Enterprise Systems is maintaining. Saving your report as a copy will break this connection.

Financial Information



Exercises: Additional Financial Reports

Directions:

- Pick at least two of the following Financial reports. Run each report using the provided prompts and then record an interesting piece of info.
- Then use your own Dept ID and date ranges. Record an interest insight or piece of information about your department.

1. **Journal Detail CSV**
   Navigation: Public Folders > Financial Information > Subsidiary Detail Reports

   - Accounting Period: 11
   - Fiscal Year: 2014
   - Department: 62010000 – HR-HR Administration

What did you discover about Department 62010000?	What did you discover about your department?

2. **Voucher Register**
   Navigation: Public Folders > Financial Information > Subsidiary Detail Reports

   - Dates: January 1–31, 2014 (Accounting Date)
   - Department: 16128010

What did you discover about Department 62010000?	What did you discover about your department?

3. **Travel Authorization Requests by Department (prompt for Travel Date)**
   Navigation: Public Folders > Financial Information > Expense and Travel

   - Dates: January 1 – June 30, 2014
   - Department: 62030000

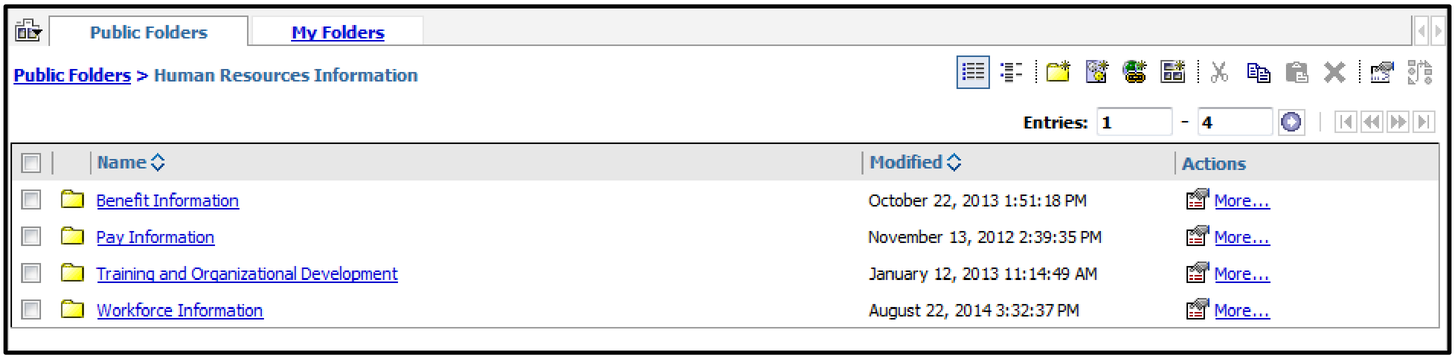
What did you discover about Department 62010000?	What did you discover about your department?

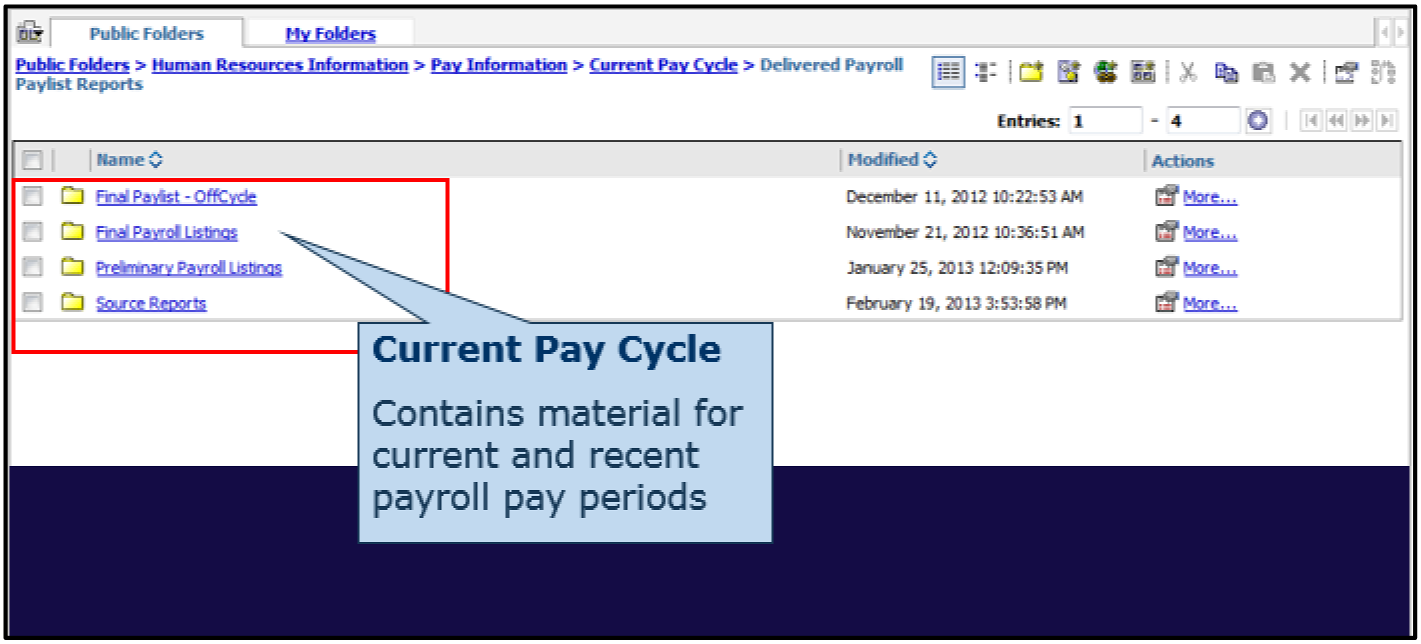
4. **PO Detail Activity Summary**
   Navigation: Public Folders > Financial Information > Purchasing

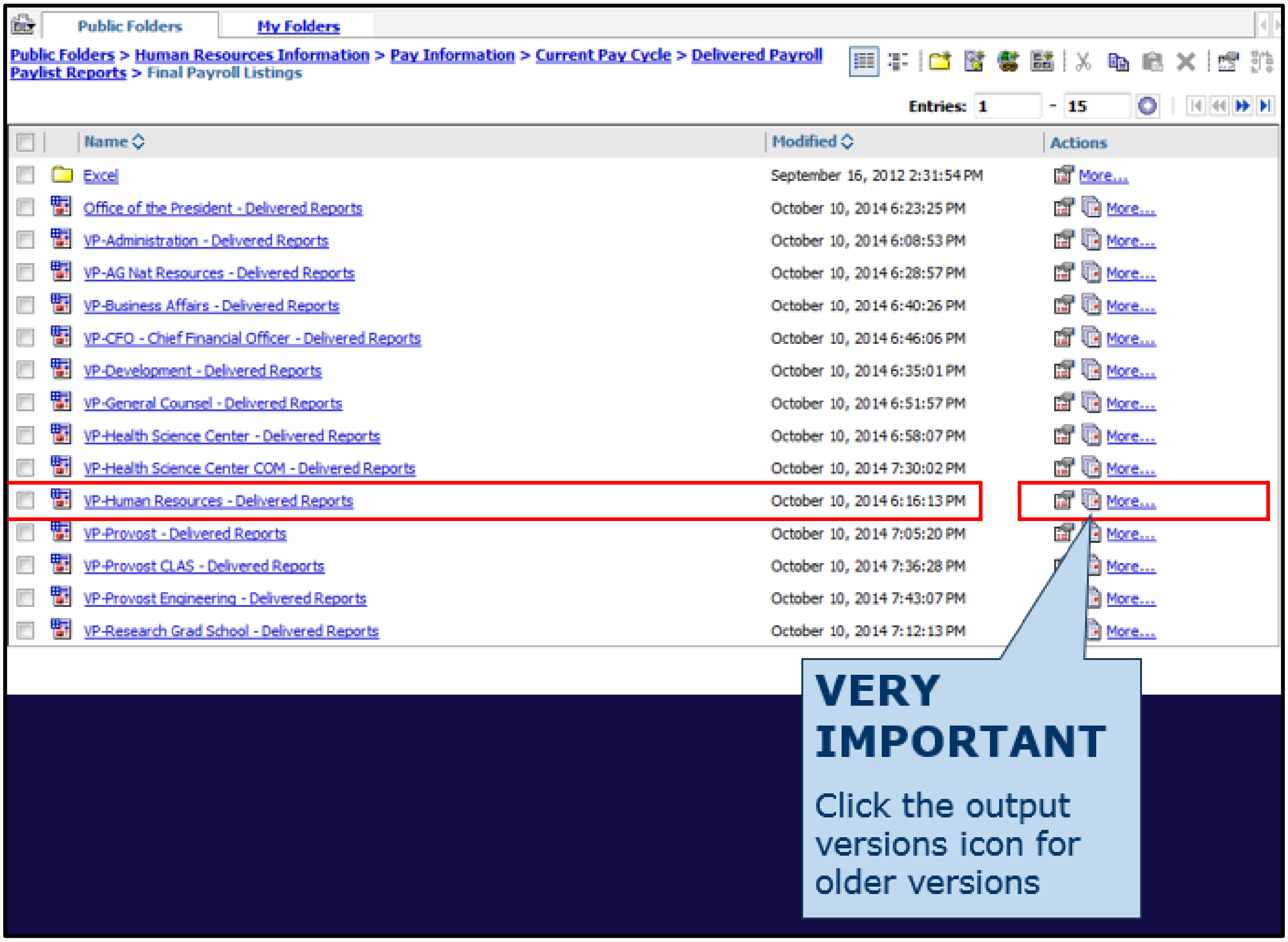
   - Dates: January 1, 2014 – July 15, 2014
   - PO Status: All
   - 4 Digit PO Business Unit: 6201

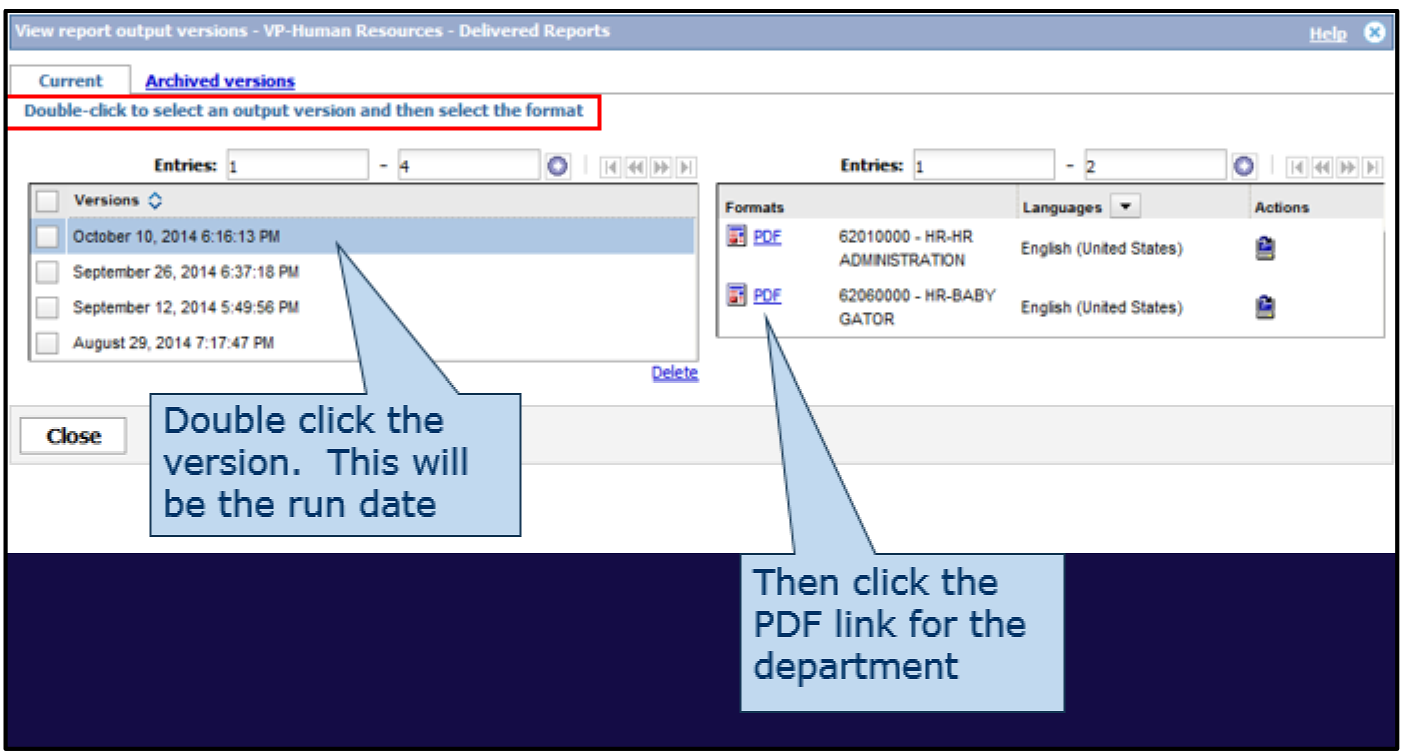
What did you discover about Department 62010000?	What did you discover about your department?

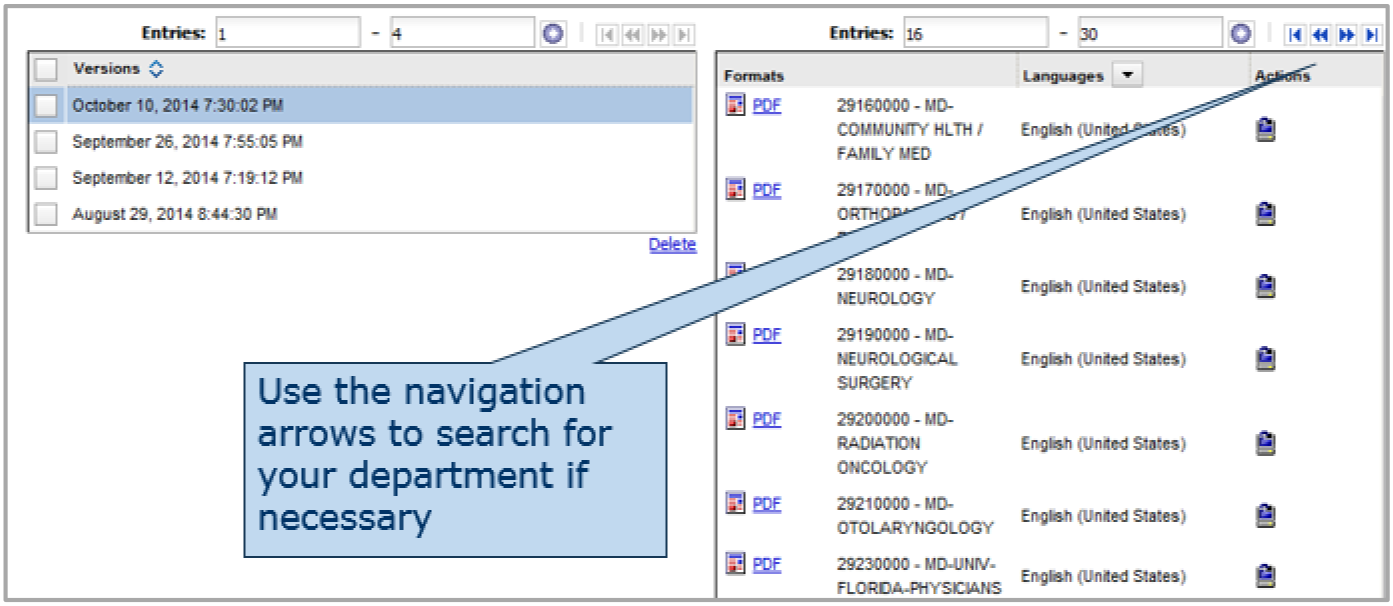
Human Resources Information

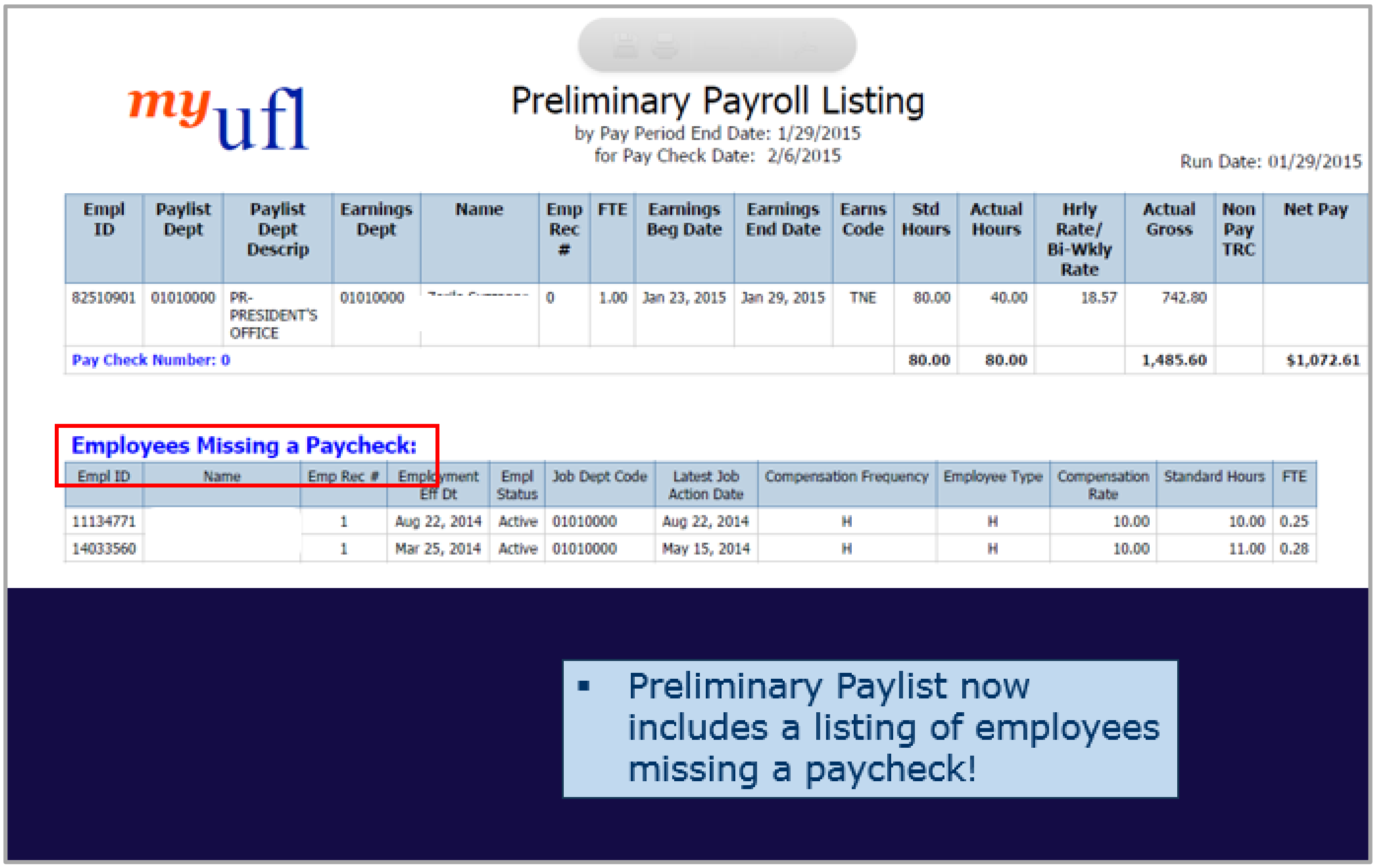





Public Folders
My Folders
Public Folders > Human Resources Information > Pay Information > Current Pay Cycle > Delivered Payroll Paylist Reports > Final Payroll Listings
Entries: 1 - 15
Name
Modified
Actions
Excel
September 16, 2012 2:31:54 PM
More...
Office of the President - Delivered Reports
October 10, 2014 6:23:25 PM
VP-Administration - Delivered Reports
October 10, 2014 6:08:53 PM
VP-AG Nat Resources - Delivered Reports
October 10, 2014 6:28:57 PM
VP-Business Affairs - Delivered Reports
October 10, 2014 6:40:26 PM
VP-CFO - Chief Financial Officer - Delivered Reports
October 10, 2014 6:46:06 PM
VP-Development - Delivered Reports
October 10, 2014 6:35:01 PM
VP-General Counsel - Delivered Reports
October 10, 2014 6:51:57 PM
VP-Health Science Center - Delivered Reports
October 10, 2014 6:58:07 PM
VP-Health Science Center COM - Delivered Reports
October 10, 2014 7:30:02 PM
VP-Human Resources - Delivered Reports
October 10, 2014 6:16:13 PM
VP-Provost - Delivered Reports
October 10, 2014 7:05:20 PM
VP-Provost CLAS - Delivered Reports
October 10, 2014 7:36:28 PM
VP-Provost Engineering - Delivered Reports
October 10, 2014 7:43:07 PM
VP-Research Grad School - Delivered Reports
October 10, 2014 7:12:13 PM
VERY IMPORTANT
Click the output versions icon for older versions


View report output versions - VP-Human Resources - Delivered Reports
Help
Current
Archived versions
Double-click to select an output version and then select the format
Entries: 1 - 4
Versions
October 10, 2014 6:16:13 PM
September 26, 2014 6:37:18 PM
September 12, 2014 5:49:56 PM
August 29, 2014 7:17:47 PM
Delete
Entries: 1 - 2
Formats
Languages
Actions
PDF
62010000 - HR-HR ADMINISTRATION
English (United States)
PDF
62060000 - HR-BABY GATOR
English (United States)
Close
Double click the version. This will be the run date
Then click the PDF link for the department





Preliminary Payroll Listing

by Pay Period End Date: 1/29/2015
for Pay Check Date: 2/6/2015

Run Date: 01/29/2015

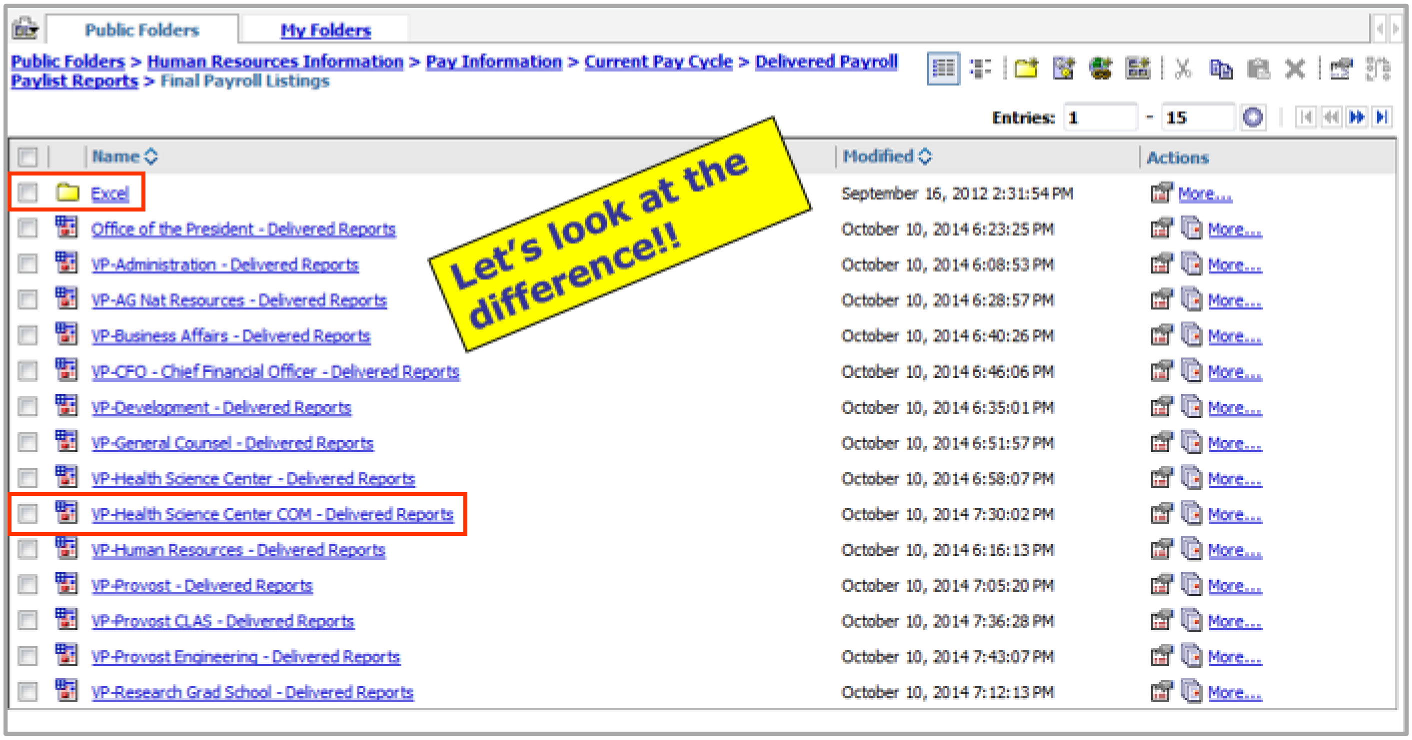
Empl ID	Paylist Dept	Paylist Dept Descrip	Earnings Dept	Name	Emp Rec #	FTE	Earnings Beg Date	Earnings End Date	Earns Code	Std Hours	Actual Hours	Hrly Rate/ Bi-Wkly Rate	Actual Gross	Non Pay TRC	Net Pay
82510901	01010000	PR-PRESIDENT'S OFFICE	01010000		0	1.00	Jan 23, 2015	Jan 29, 2015	TNE	80.00	40.00	18.57	742.80		
Pay Check Number: 0										80.00	80.00		1,485.60		$1,072.61

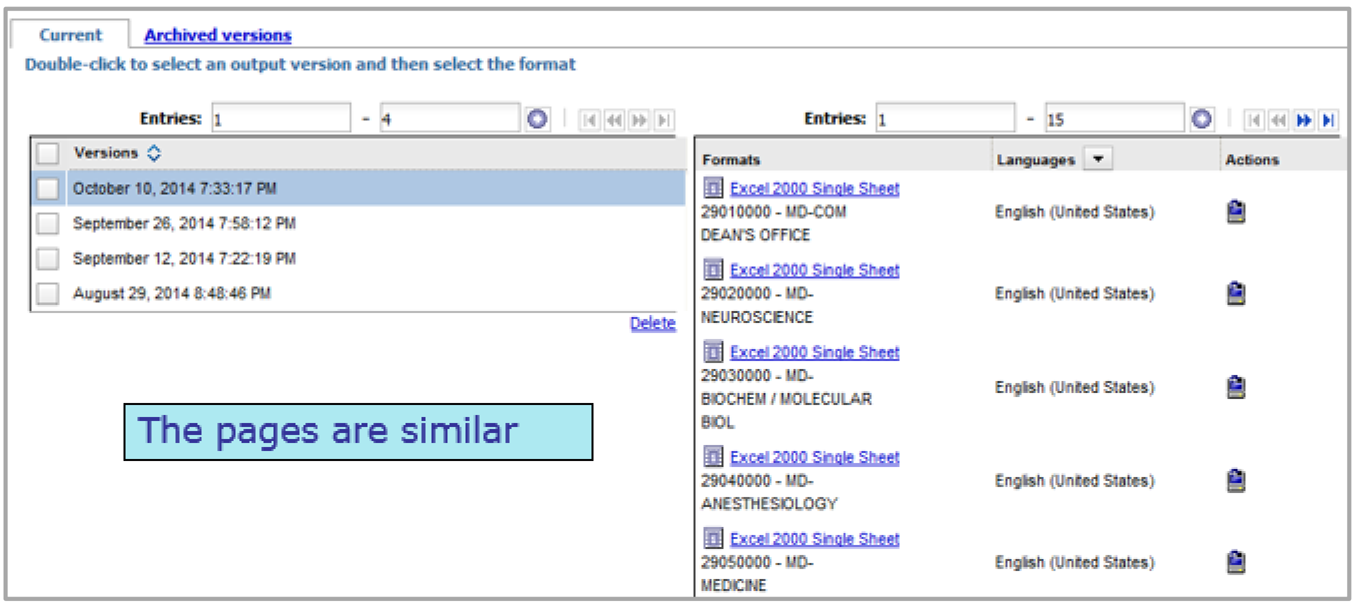
Employees Missing a Paycheck:

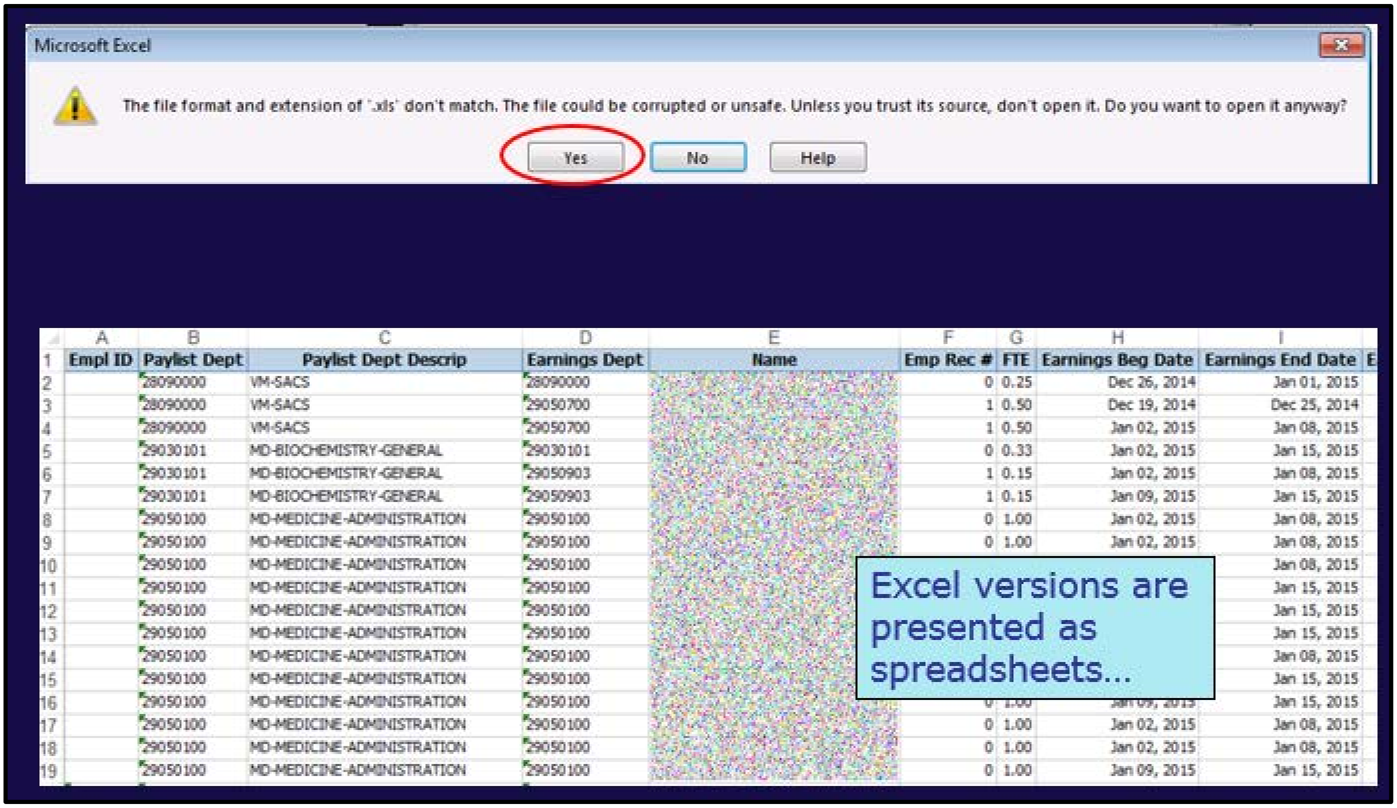
Empl ID	Name	Emp Rec #	Employment Eff Dt	Empl Status	Job Dept Code	Latest Job Action Date	Compensation Frequency	Employee Type	Compensation Rate	Standard Hours	FTE
11134771		1	Aug 22, 2014	Active	01010000	Aug 22, 2014	H	H	10.00	10.00	0.25
14033560		1	Mar 25, 2014	Active	01010000	May 15, 2014	H	H	10.00	11.00	0.28

- Preliminary Paylist now includes a listing of employees missing a paycheck!

Delivered Reports (Excel)







Exercises: Human Resources Reports

Directions:

- Pick at least two of the following Human Resources reports. Run each report using the provided prompts and then record an interesting piece of info.
- Where applicable, use your own UF ID, Dept ID, and/or date ranges. Record an interest insight or piece of information.

1. Leave Accruals, Usage, and Balances by PPE, Empl ID

Navigation: Public Folders > Human Resources Information > Benefit Information > Leave

- o Pay Date: Last one
- o Empl ID: 68650080

What did you discover about the leave for above employee?	**What did you discover about your own leave?**

2. **Reported Time and Leave by Department**
   Navigation: Public Folders > Human Resources Information > Benefit Information > Leave

   - Dates: January 1, 2014 – June 30, 2014
   - College: 62000000
   - Department: 62010700
   - TRC: VAC 185-Vacation Used
   - TEAMS 12 Month

What did you discover about the above department?	What did you discover about your department?

3. **Employee Email Listing for Salary Plan(s)**
   Navigation: Public Folders > Human Resources Information > Workforce Information

   - Salary Admin Plan: TA12

How many emails are listed for this salary plan? (HINT: You might need to download the reporting output to a different format to find out!)

4. **New Hires by Salary Admin Plan**
   Navigation: Public Folders > Human Resources Information > Workforce Information

   - Dates: 10/10/13 to 10/10/14
   - Salary Admin Plan: TA12

How many people were hired at Enterprise Systems in this salary plan during the listed date range?	What about for your department?

Creating Folders in Enterprise Reporting

You can organize your report views into folders. Making sure those folders are logically labeled and organized helps you manage your report views.

1. Navigate to **My Folders**, go to the location for the new folder
2. Click the new folder button
3. In the **Name** box, enter a name for the new folder
4. In the **Description** and in the **Screen tip** box, you can type a description of the entry.

NOTE: The description appears in the portal when you set your preferences to use the details view. The screen tip (limited to 100 characters), appears when you hover cursor over the folder icon for the item.

5. If you do not want to use the target folder, which is the current folder as indicated under
   Destination Folder, choose another location:
   - Click **Select another folder** and select the target folder
   - Click **OK**
6. Click **Finish**

Creating a Portal Tab

Add additional tabs to organize content as desired. Visit the Enterprise Reporting Basics toolkit for step-by-step instructions.

Scavenger Hunt Challenge

Directions:

Using the skills you've learned in class today, use Enterprise Reporting to solve each challenge! Save a Report View of each to your My Folders area. Jot down the name of the report for future reference.

Challenge	**Report Used**
1. Generate a list of all employees in a particular department and include the security roles they have.	
2. Find the January 2015 PCard charges for *your* purchasing department. (You'll need to use your four-digit DeptID.)	
3. Run a report to show the payable time for each person in your department.	
4. Produce a listing of purchasing business units with department details.	

Access & Security

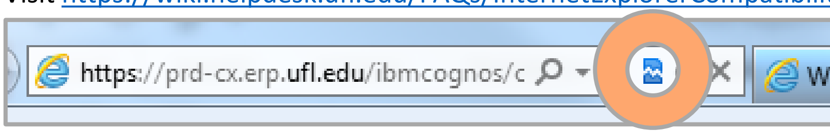
- ER is available to all faculty and staff
- Request Roles via myUFL with your Departmental Security Administrator
    - FI access is granted with the UF_FI_UNIVERSAL_INQUIRY
    - HR access is tied to your HR PeopleSoft Roles

Benefits of Enterprise Reporting

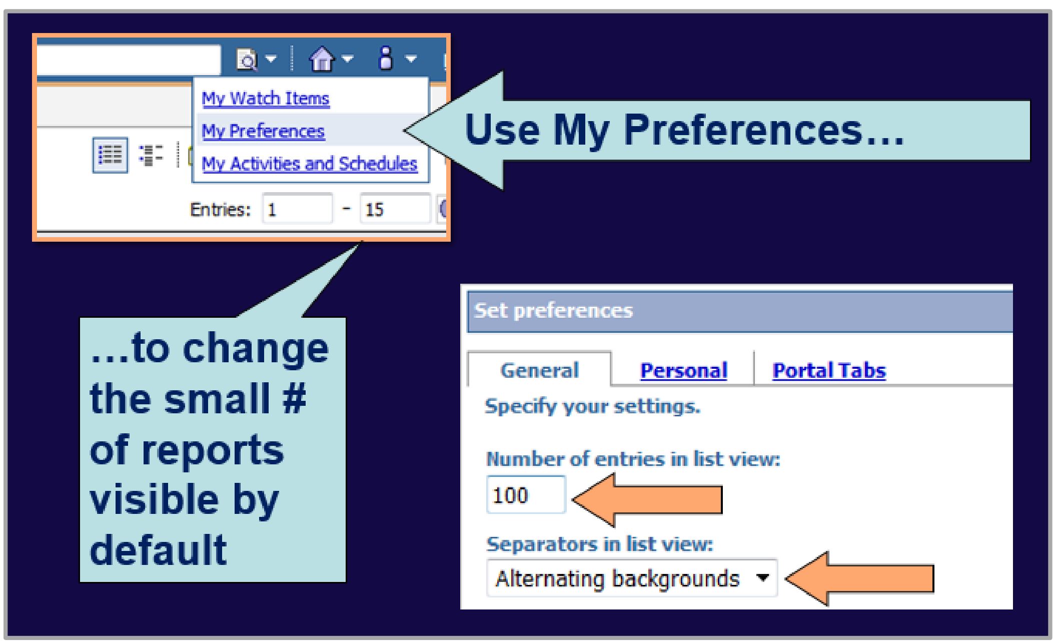
- Self-service/On-demand Web Access
- Get what you need *FASTER*
- Reduce need for shadow databases
- Reduce reliance on IT staff
- Meet reporting needs for all departments
- New and historic data

The Best Experience

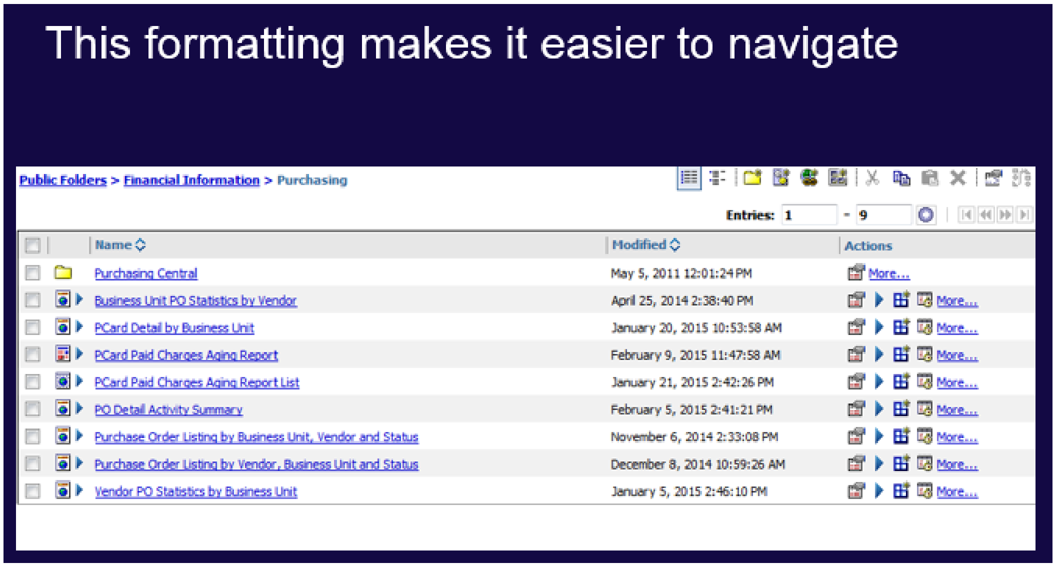
- Activate Compatibility Mode in Internet Explorer
- Visit https://wiki.helpdesk.ufl.edu/FAQs/InternetExplorerCompatibilityView for more details



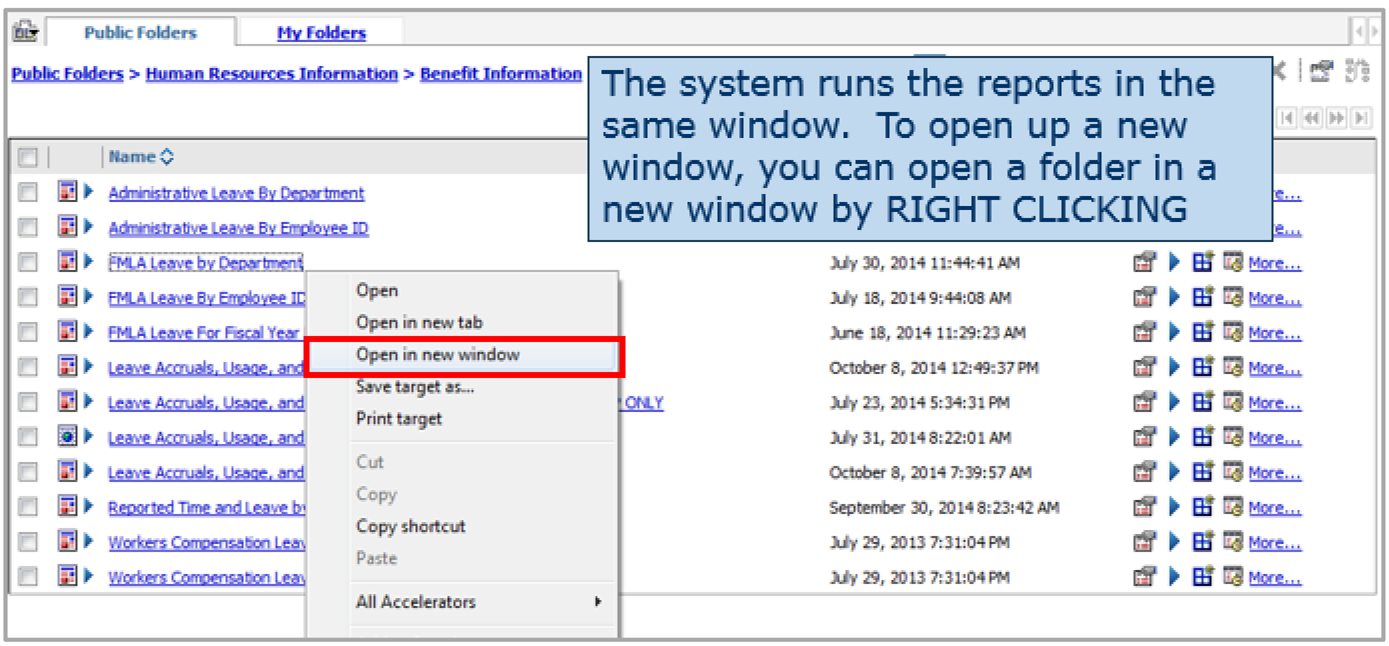
- Remember to log out of Enterprise Reporting rather than simply closing the browser window. This insures that there are no processes left running from your session
- Refine report prompt selections as much as possible, if you select nothing you get EVERYTHING!!!
- Data In = Data Out!
- Data in warehouse is updated overnight
- Service Level Agreement/advertised time is "by 8 a.m."



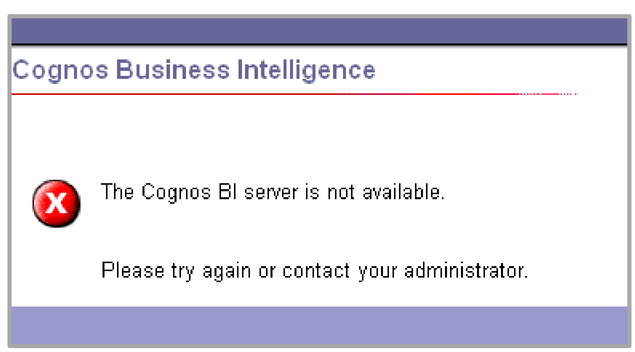
- Alternating Backgrounds



- Helpful Hint…



Something Broken?



- If the report fails and it has run in the past, re-submit
- If it fails again, open a ticket with the UF Computing Help Desk (helpdesk@ufl.edu or 392-HELP)
- Remember to be specific with what you enter on the prompt page

Need Reporting Help?

- Not finding the data you need?
- Having trouble?
- Reporting Services can help!
- reporting-services@ufl.edu

Additional Great Resources!

- myUFL Toolkits
  - Web Simulations
  - Instruction Guides
  - Security Roles
  - Training
  - Contact Information
  - Other Helpful Information
  - http://hr.ufl.edu/learn-grow/just-in-time training/myufl-toolkits/

- There are three toolkits dedicated to Enterprise Reporting:
  - Enterprise Reporting Basics
  - PowerPlay
  - Query Studio

Additional Reporting Training

- PST130 Reconciliation
- PST117 Reporting: PowerPlay
- PST912 Reporting: Query Studio

<u>All are available in the classroom and online!</u>

TOP 10 *Most Popular Reports*

1	**PCard Paid Charges Aging Report** • Public Folders > Financial Information > Purchasing
2	**Excel - Payroll or Fellowship Earnings and Estimated Fringe Benefits by Cost Center by Person** • Public Folders > Financial Information > Subsidiary Detail Reports
3	**PDF - Payroll or Fellowship Earnings and Estimated Fringe Benefits by Cost Center by Person** • Public Folders > Financial Information > Subsidiary Detail Reports
4	**PDF – Transaction Detail** Public Folders > Monthly Financial Reports > Department Reports
5	**Source Transaction Detail – UFLOR** • Cube Drill Through Report
6	**PDF – Payroll Reconciliation Detail** • Public Folders > Monthly Financial Reports > Department Reports
7	**Excel - Payroll or Fellowship Earnings and Estimated Fringe Benefits by Person** • Public Folders > Human Resources Information > Pay Information > Current Pay Cycle > Prompted Cost Distribution Reports
8	**PDF - Payroll or Fellowship Earnings and Estimated Fringe Benefits by Person** • Public Folders > Human Resources Information > Pay Information > Current Pay Cycle > Prompted Cost Distribution Reports
9	**Leave Accruals, Usage and Balances by Pay Period, Department** • Public Folders > Human Resources Information > Benefit Information > Leave
10	**Leave Accruals, Usage, and Balances By PPE, EmplD** • Public Folders > Human Resources Information > Benefit Information > Leave