# Introductory Enterprise Analytics

## User Guide

## Table of Contents

# Introduction

Welcome to Enterprise Analytics! The University of Florida utilizes Enterprise Analytics, powered by Cognos 11.2.4, a web-based reporting solution for creating and running reports that includes financials, human resources, sponsored projects and student information data.  The data in Enterprise Analytics is comprised of daily financial transactions and employee and student information data processed in myUFL.

Specific departments within the University of Florida take ownership and govern the data in the data warehouse. The main three security roles needed to access packages are UF_FI_UNIVERSAL_INQUIRY (financial data), UF_HR View/Inquiry (HR data), UF_ER_SA_Student_Financials (student data) To acquire access to a specific package, work with your supervisor and Department Security Administrator (DSA).

## Basic Information
1. Information in Enterprise Analytics is current **as of the close of the prior business day.**
2. Enterprise Analytics works with any of the following browsers – more information can be found on the IBM website:
    a. Firefox *
    b. Chrome
    c. Safari

*Analysis Studio (Cubes) is only compatible in Firefox.*

## New Features of Enterprise Analytics

The first thing you will notice when you login to Enterprise Analytics is the completely updated modern interface, which has more emphasis on self-service and the user experience.  Here are some of the features to look forward to (depending on your security roles):

1. Completely redesigned interface
2. Breadcrumb Trail that keeps track of where a user has been clicking through the folder structure
3. Improved shared folder structure for easier navigation
4. Enhanced dashboard and storyboarding functionality

## About the Data Warehouse

The University of Florida data warehouse is a database that is optimized for rapid data retrieval. Within the data warehouse are data warehouse tables, which can be thought of as individual spreadsheets within an Excel document. The data model is built on top of data warehouse tables and allows end users to build reports or dashboards visually instead of using code (i.e., SQL, HTML) to pull data.

On a nightly basis, via the Extract, Transform, and Load (ETL) process, the data is moved from the source systems (like myUFL) into the warehouse (and Enterprise Analytics). **Therefore, information in the data warehouse is as-of the close of the prior business day. Remember, data in Enterprise Analytics is only as accurate as the data entered into source systems like myUFL.** If you see data that doesn't seem correct in Enterprise Analytics, the first step is to check the source system.

This diagram shows how data flows from source applications into the reporting application. Understanding this process at a high level will help end users think critically about the data.
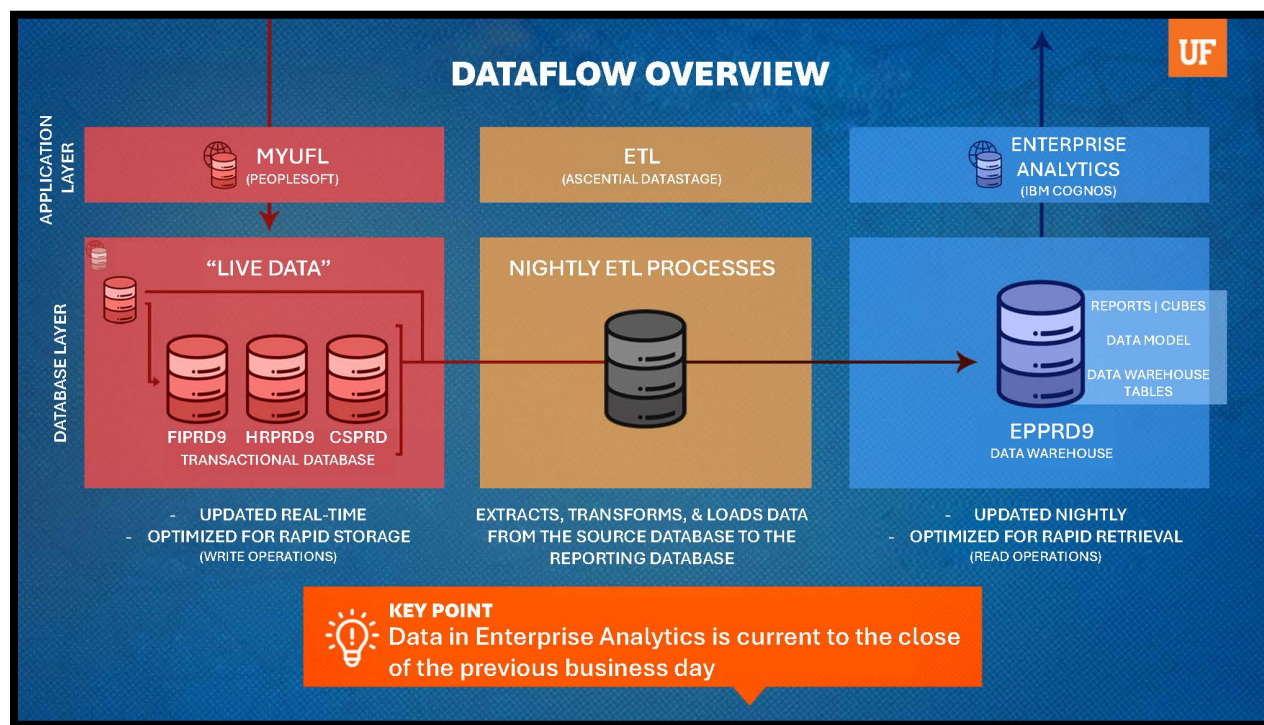


Here are some key parts of this diagram:

1. On the top left is the application layer where end users access the myUFL application (aka PeopleSoft). Data entered into myUFL is stored real time into the PeopleSoft Databases.
   a. There are multiple databases "underneath" or behind myUFL and each one is represented by a stack of three cylinders.
      i. **FIPRD9:** FI stands for Financial: This database stores financial transaction data like vouchers and journal entries
      ii. **HRPRD9:** HR stands for Human Resources: This database stores hiring, job changes, leave and more

        iii.   **CSPRD:** CS stands for Campus Solutions: This database stores student data like scheduling and course loads

    b.   To the upper left of the myUFL databases is the UFIRST application. End users enter grant proposals into this system and it is stored real time in the UFIRST database. The UFIRST database is named SPPRD (SP stands for Sponsored Programs).

2. In the middle is the nightly ETL process. The ETL is the bridge between where end users enter data into myUFL and where end users report on data in Enterprise Analytics. These processes retrieve data entered into myUFL, organize it to make it easier for end users to pull reports, and load it into Enterprise Analytics every night.
3. On the right is the database layer, where data is stored in the Data Warehouse.
4. The last step is Enterprise Analytics on the top right. This is in the application layer where end users access Enterprise Analytics and where data flows back out to end users.

## Accessing Enterprise Analytics

1. Login to myUFL with your Gatorlink username/password.
2. Navigate to: **Main Menu >> Enterprise Analytics >> Access Enterprise Analytics**.

## Welcome Page

The first screen you may see is the Welcome Page – this is where everything happens. **Your opening screen might look different depending on your "view" of Enterprise Analytics or whether you have accessed the system before.** From the Welcome Page (depending on your security roles) you can run reports, search for content, view content, open dashboards, upload files, check your notifications, set your preferences, review your subscriptions, watch "how-to" videos in 'Getting Started' and view samples developed by UFIT.
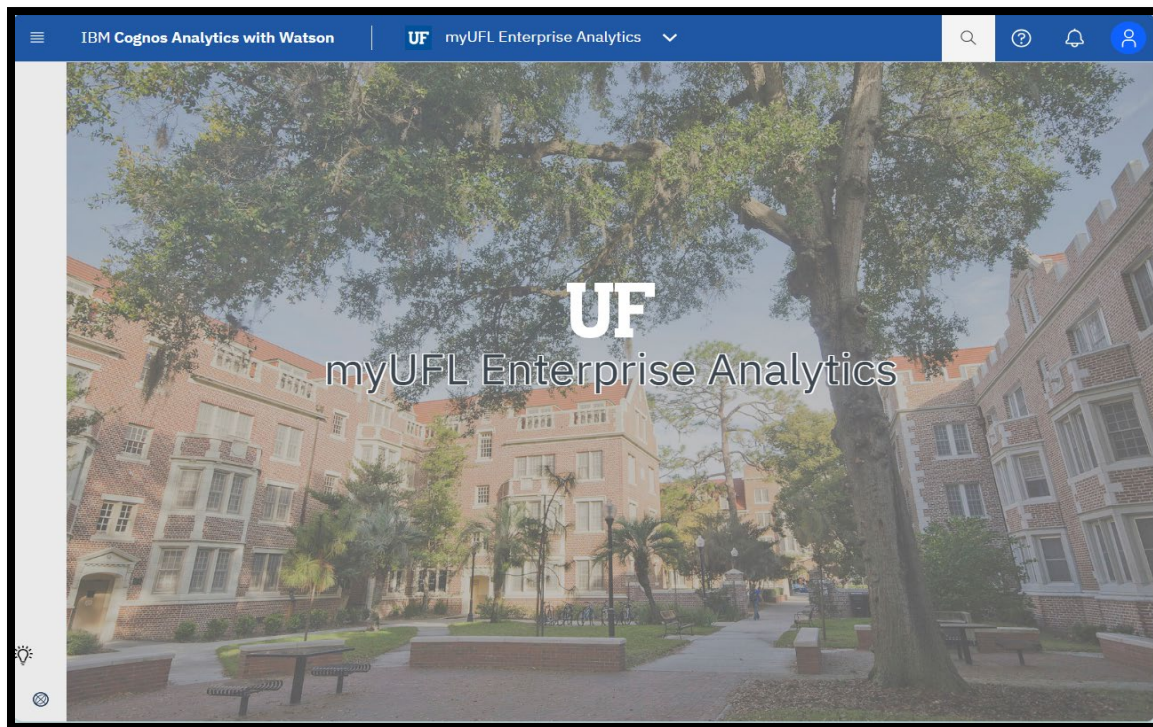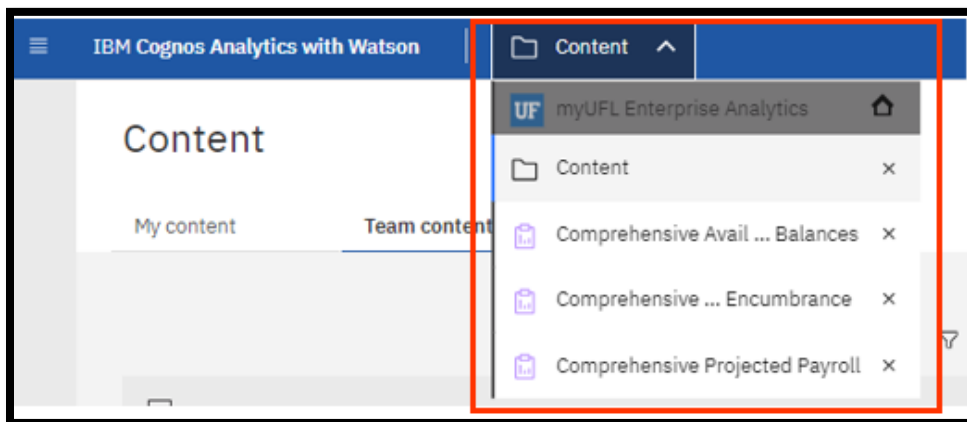
## Welcome Page Orientation
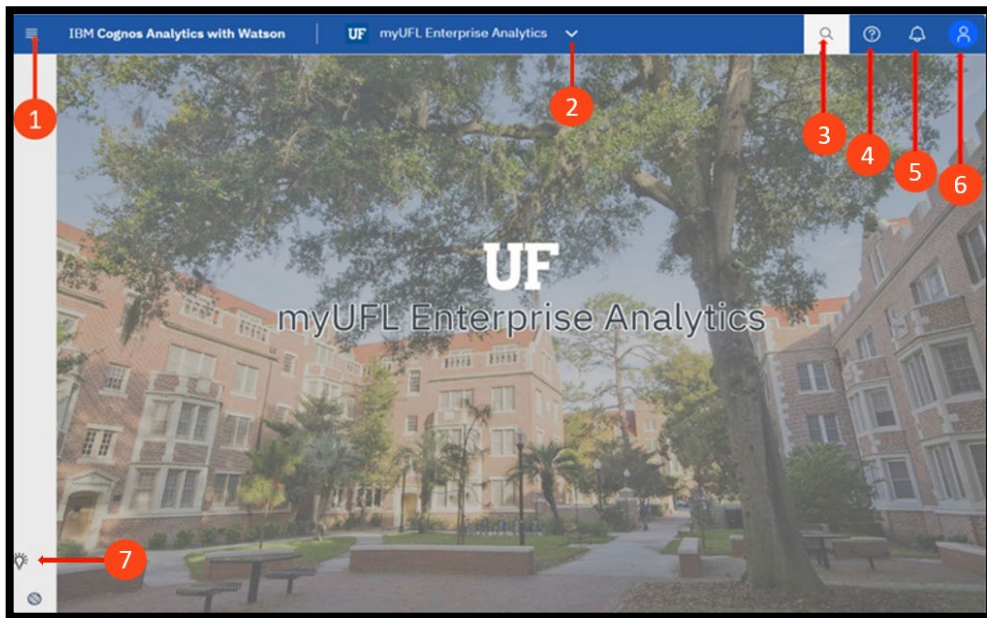


**1**    The **Navigation Menu** is expanded when the user clicks on the hamburger (stacked horizontal lines), located on the far-left corner of the Application Bar. Otherwise, the Navigation Menu is hidden.

**2**    **Executed Reports icon:** Allows you to toggle back and forth to already executed reports



.

**3** **Search icon/Box**: Search is a quick, easy way to find exactly what you are looking for!

*You might see many files show up when you search. However, if the breadcrumbs start with **Shared Folders** that is a department or college's specific version of the report. Best practice is to run reports found in **Team Content** due to unknown customizations that may be coded in the Shared Folder reports.*
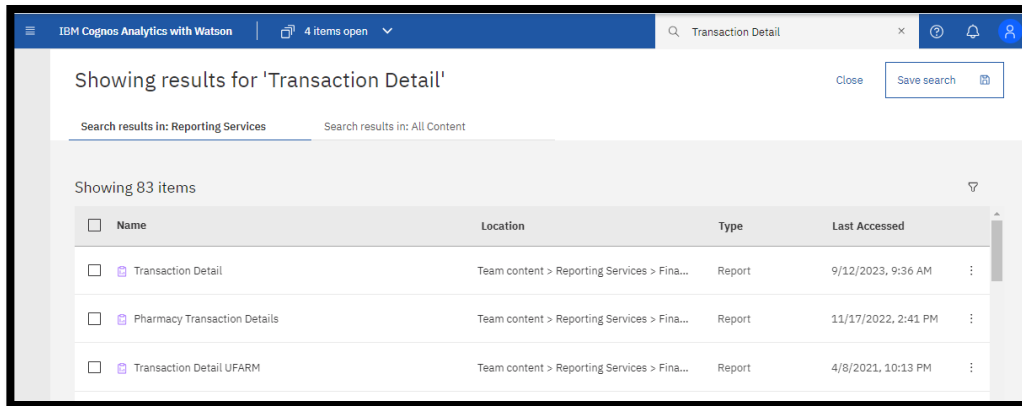


**4** **Question icon**: access to IBM Cognos Analytics specific help, type in search criteria and review options
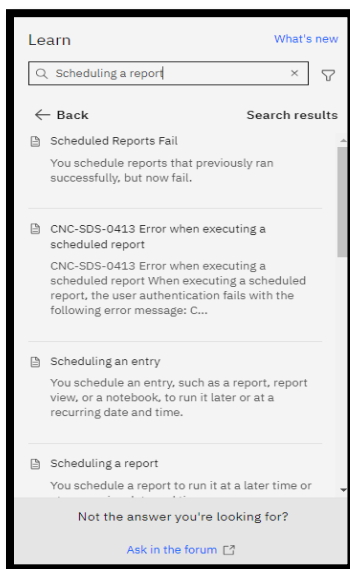


**5** **Bell icon:** Notifications section provides updates when subscribed reports have completed
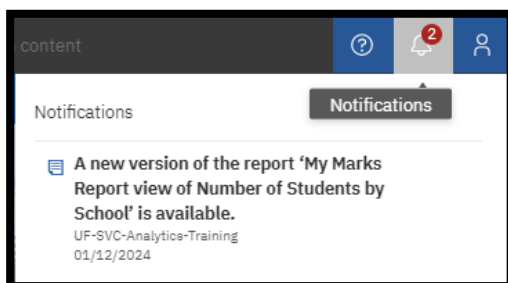
**6** **Person icon:** Personal Menu allows you to adjust your personal settings, change your preferences, easily make modifications to your schedule and subscriptions, and logout of Enterprise Analytics.
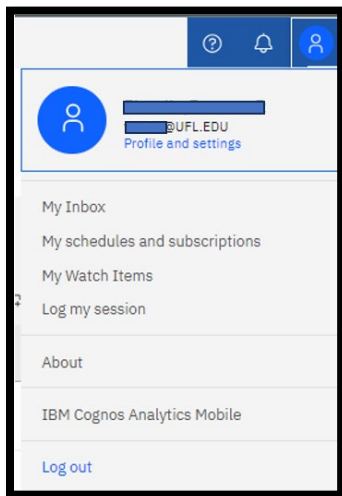


*You can turn on accessibility features in My Preferences under your personal menu.*

**7** **Getting Started icon:** Access to watch UF specific recorded "how to" videos

## Top Left Side Navigation Panel
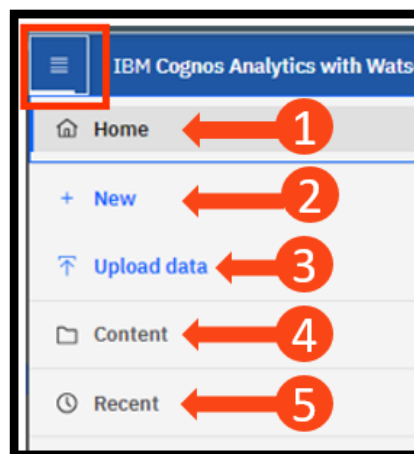


The left side navigation menu has the following selections:

**1** **Home**, will take you back to the Welcome page in a single click

**2** **New**, will open a menu with selections to create new objects

**3** **Upload data**, will allow for uploading documents to Enterprise Analytics

**4** **Content**, will take you to the Enterprise Analytics folders

**5** **Recent**, lists the reports, dashboards, etc. that you most recently accessed

# Navigating Enterprise Analytics Folders and Objects

## My Content and Team Content
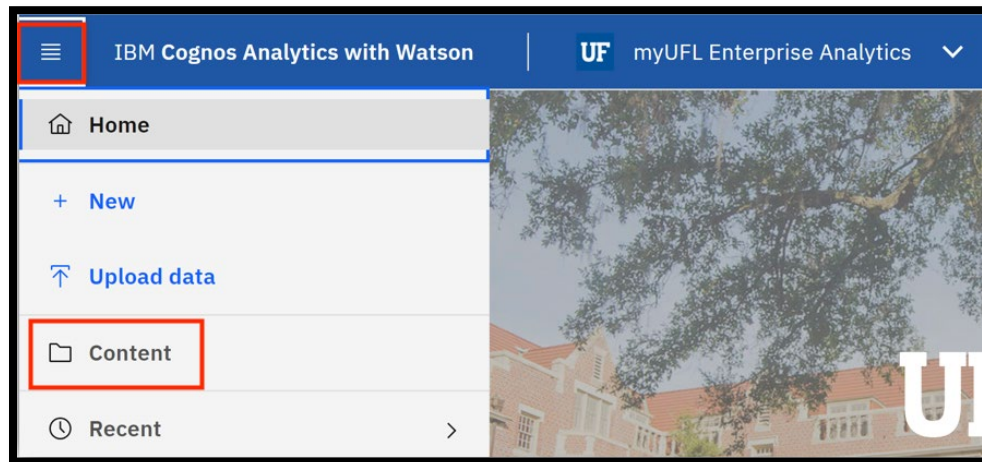


Click on the Navigation menu to expand the menu options. Select 'Content' to access 'My Content' and 'Team Content' folders.
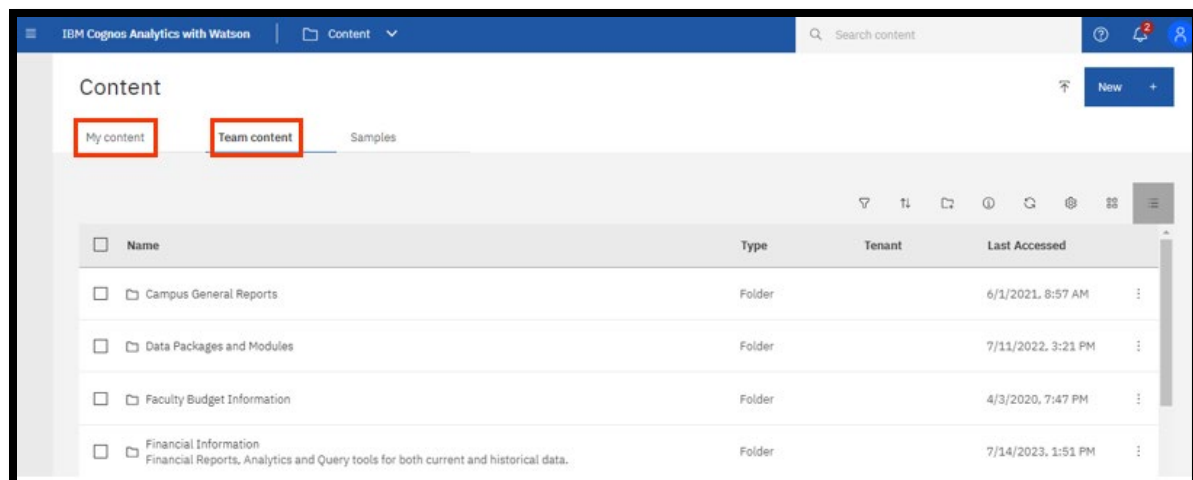


**My Content** is a user's secured area within Enterprise Analytics that provides direct access to any content you have saved there.  **It cannot be accessed by other users.**

A key feature is that once reports have been saved to My Content, you can modify and personalize them.  My Content gives you the ability save report views from Team Content folders to schedule or view again (how to do this will be covered later!).

**Team Content** is the area within Enterprise Analytics that reveals any folder containing reports (or other objects) that you have access to based on your security roles.  **You cannot modify or personalize reports in these folders.**  Many of the reports developed by the core offices that can be helpful for users are found here, such as:

- Financial Information

- Human Resources Information
- Monthly Departmental Reports
- Sponsored Projects Information

And more!  Continuing to scroll down **Team Content** will bring you to the Shared Folders that are department specific.

*Check with your team to find out the useful items that are found in this folder.*

Within the Content Space you are able to view folders both in List View and Tile View. Depending on your view there are different options.
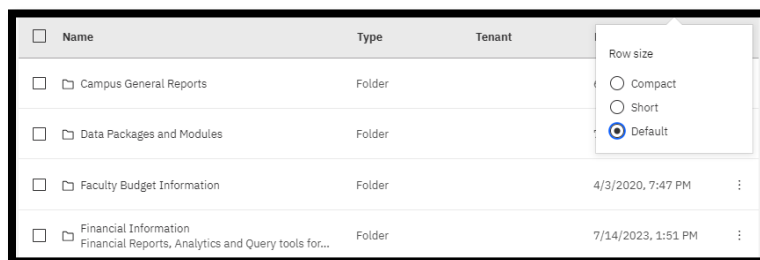
## Folder View Options

### Using the List View



List View Setting Options:

#### Default – includes object description

Short – similar to compact but more space padding between lines; no description



Compact – object name/title only, no description



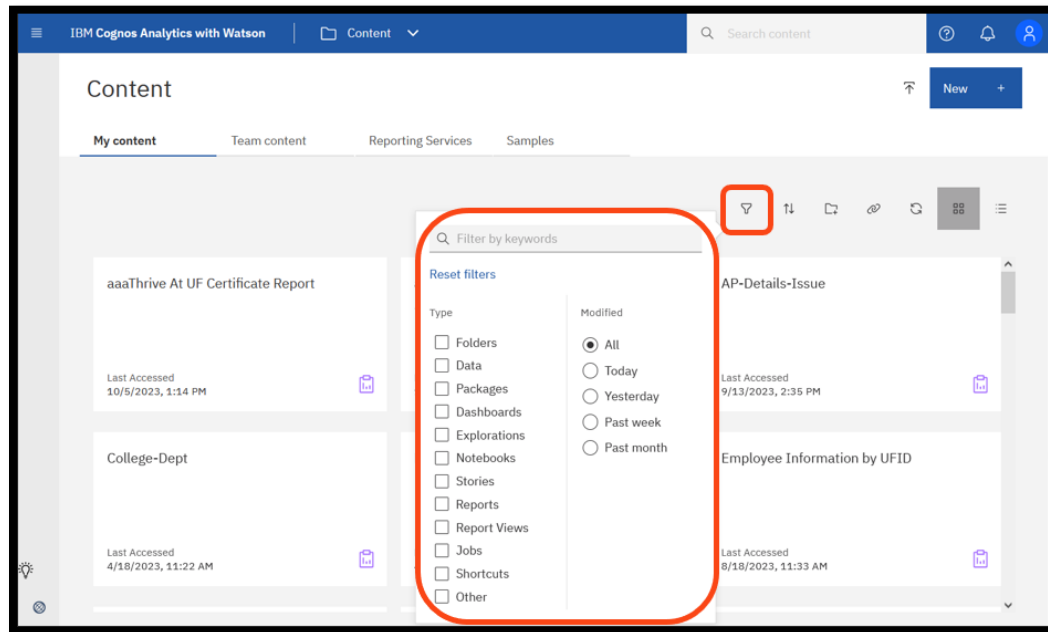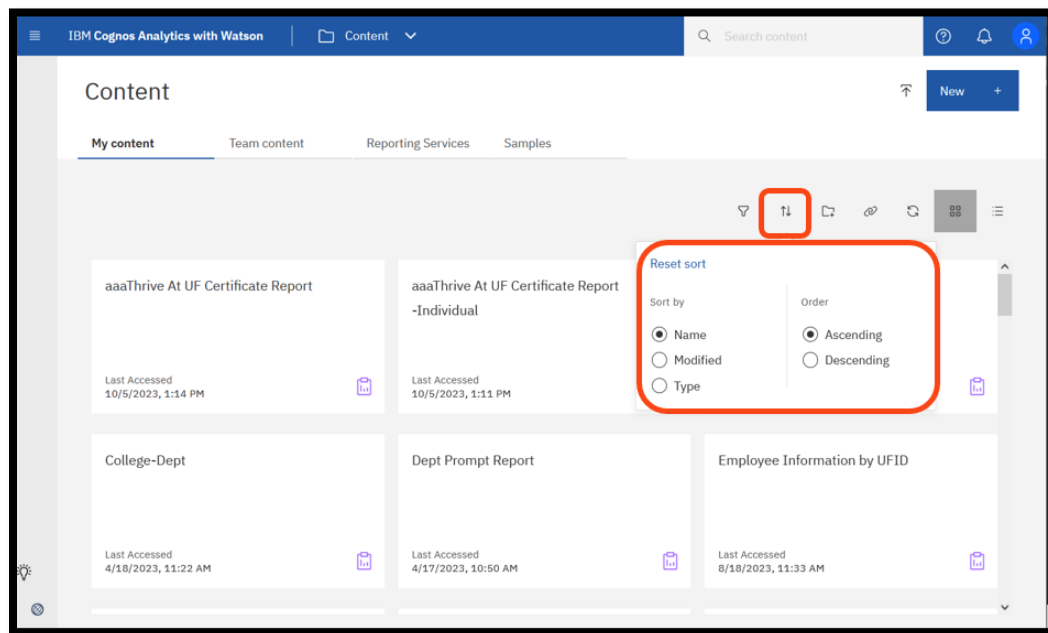## Tile View



Tiles View displays a list of items in the folder in the above format
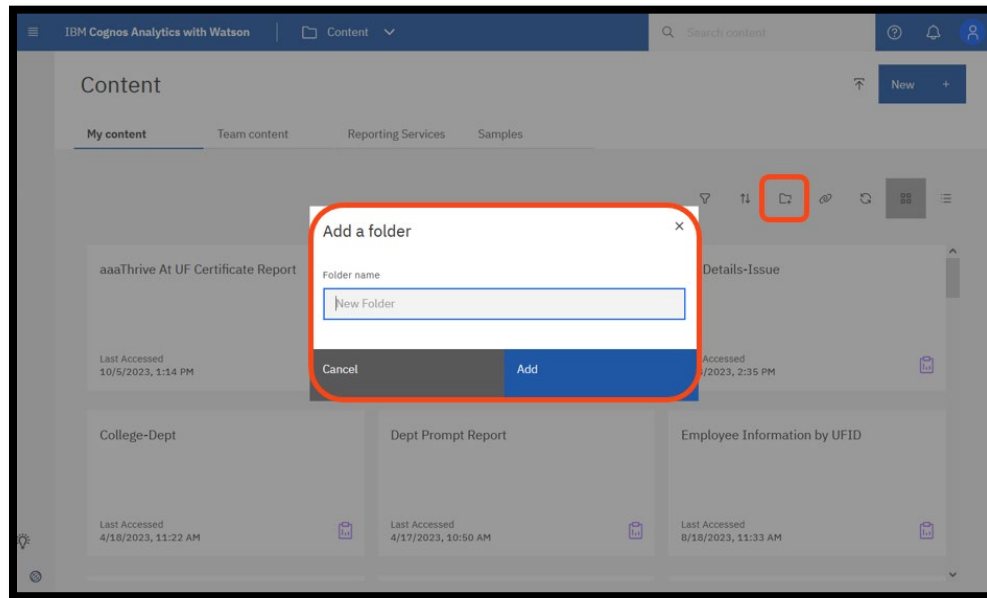
## Filtering Folder Content



The filter option lets you narrow down the items displayed.
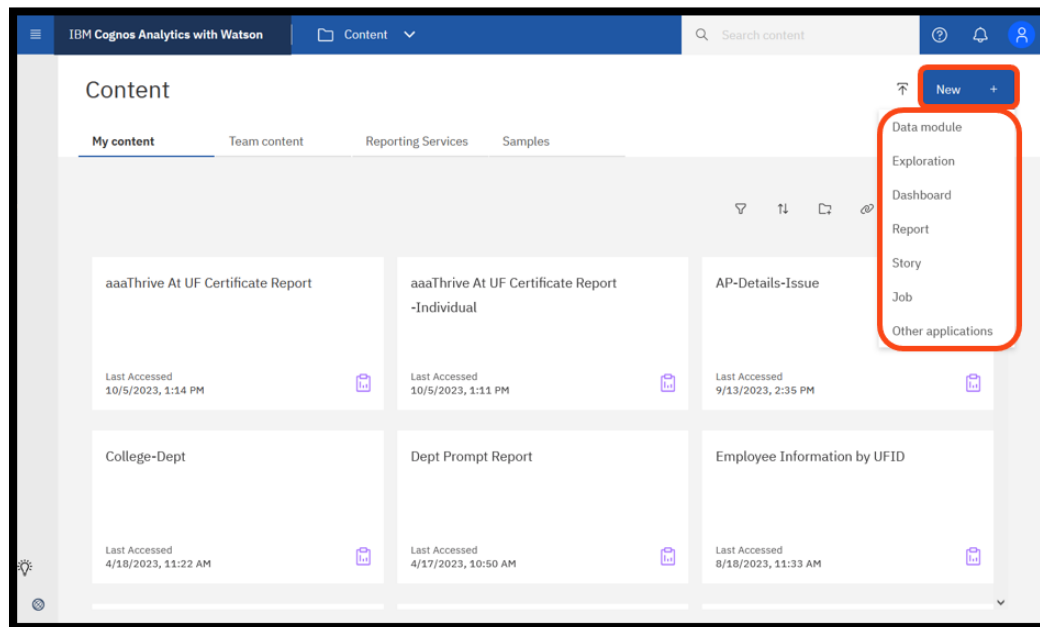
## Sorting Folder Content



Using the Sort icon allows for changing the order of the items displayed
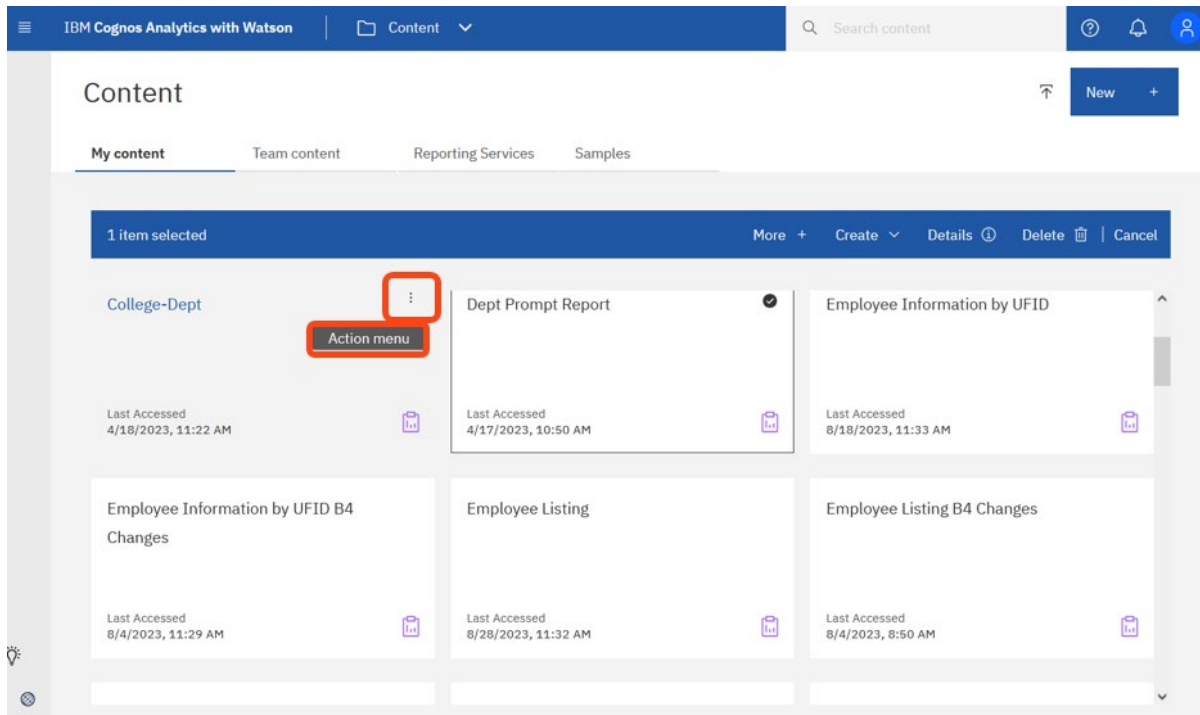
## Creating a new Folder



Using the Add Folder icon gives the user the option to create additional folders. Appropriate permissions are required to create folders in the "Team Content" area.
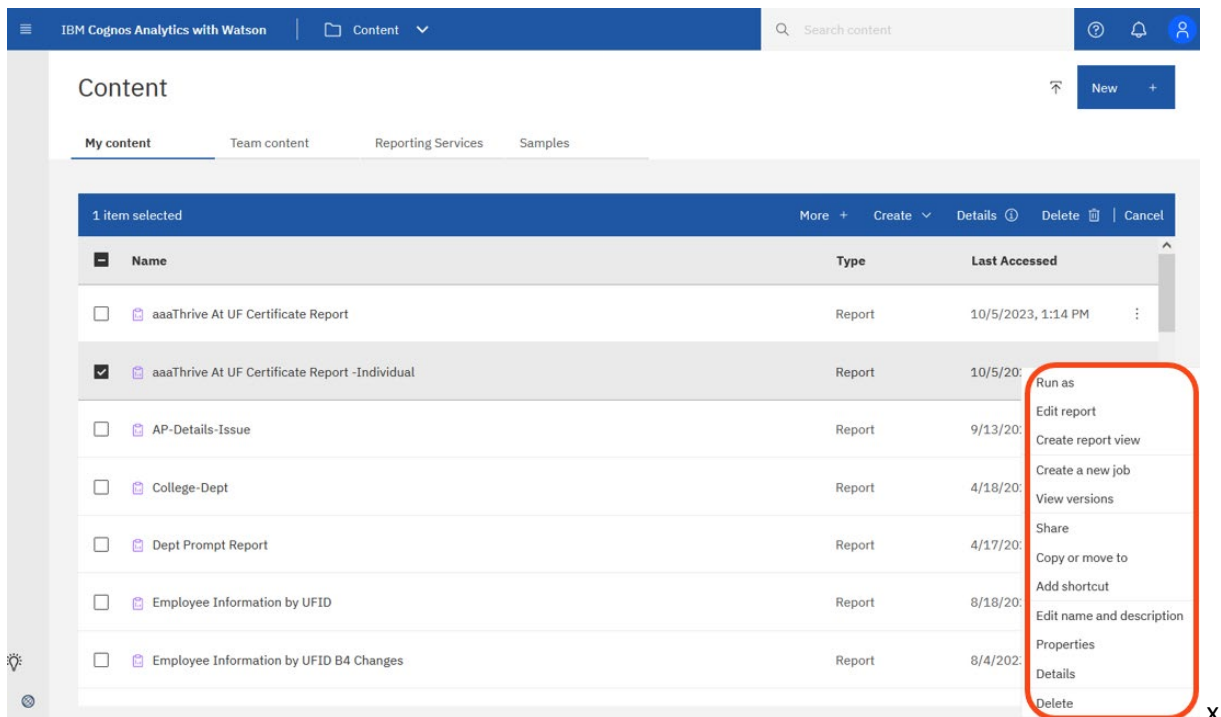


The New icon gives the user the option to create a new item from the Content display

# Viewing and Interacting with Content



For each item in the folder you can select the Action Menu for additional options

# The Action Button



By clicking the Action Menu you are presented with a dropdown list and menu bar selections

*Depending on your security access, you might not see everything on this list.  Work with your supervisor and DSA if you have questions about your security roles.*

| | |
|---|---|
| **Run as** | Allows you to choose from a list of desired output formats and to run directly to that format. Also allows for the option to Run in background while you do other tasks in Enterprise Analytics. |
| **Edit report**, (*Report Authors only*) | Allows you to make changes/edits to the original. |
| **Create report view** | Creates a report view of the report in your My Content folder. Usually used to create a dynamic copy of the report that you can Schedule (covered later in this guide) and set/save your prompts. This is our recommended practice and is best used for creating a 'favorites' listing in a specific folder instead of creating new copies/versions of a report. |
| **Create a new job** | A job identifies a collection of reports and/or report views that are scheduled together and share the same schedule settings. |
| **View versions** | Displays any previously saved report outputs. |
| **Share** | Copy link to share content with other users. |
| **Copy or move to** | Copy or move a report to another destination within Enterprise Analytics. The user must have the security access to write a report to the new destination (for example, you could not copy a report to someone else's My Content or a different department's folder).  A user can copy anything to their My Content area. |
| **Add shortcut** | Used to create a shortcut of the report in My Content. |
| **Edit name and description** | Used to change the report name and/or the report description. |
| **Properties** | This option gives the use the ability to change the General, Capabilities and Permissions for the item. Here is where schedules are created. |
| **Details** | The details panel shoes the user the report owner, date created and modified. It also gives the option to Open, Run, Edit and Create a report. |
| **Delete** | This menu option will let the used delete the report. |

## Running Content

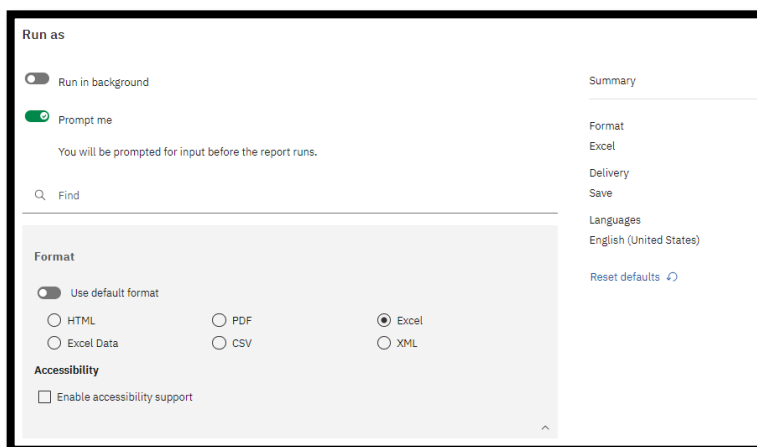When you find a report, you would like to run, you have several options.

## Run with Default Options

Navigating to the desired report from My Content or Team Content and clicking on the report name will run the report with the default option. If there is a prompt page, you will be prompted.
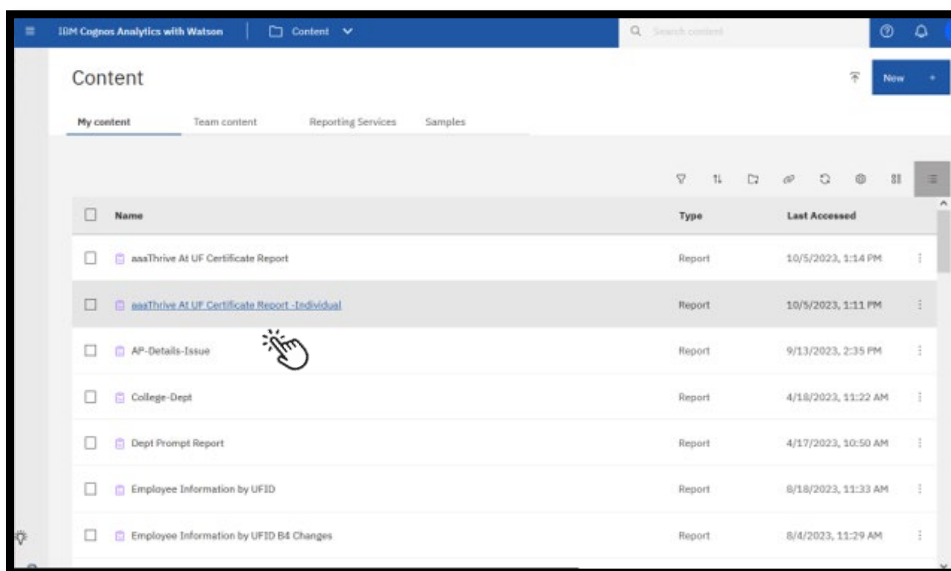


## Run With Custom Options (Run As)

Navigate to the **Action Menu**.  Choose **Run as**, which will open a new menu with options to select PDF, Excel, CSV, Excel Data, etc. output format. This is especially helpful if you encounter a report with a default format.



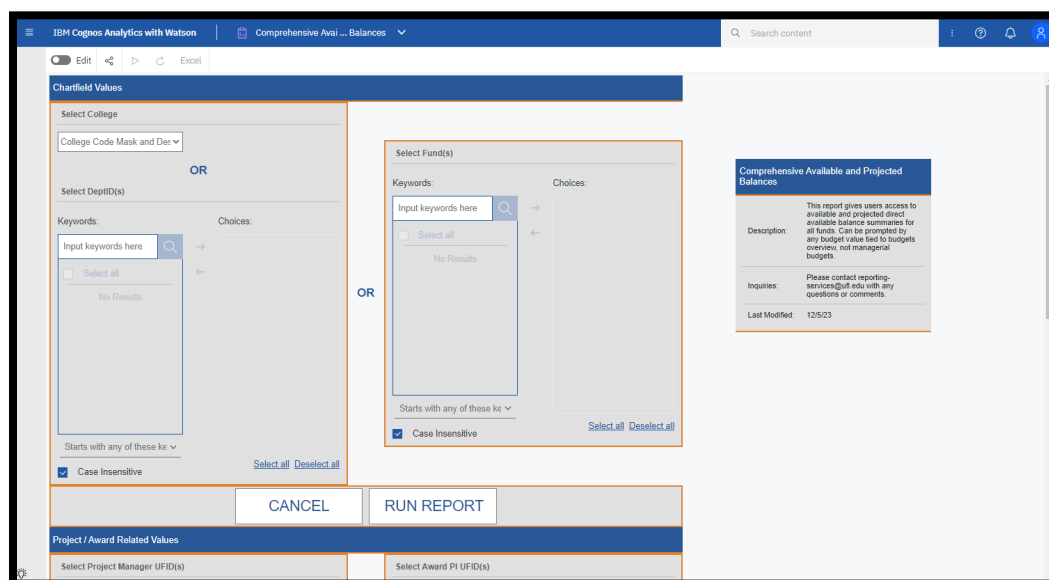| | | • Default output |
|---|---|---|
| | **HTML** | • Web based and designed for viewing report output on-screen |
| | | • All pages are displayed and accessible for any report containingtabbed layouts |

| | | |
|---|---|---|
| PDF | | • Used for printing and distributing in Adobe AcrobatReader<br>• Each page in a tabbed layout report will render its own page |
| Excel | | • Supports lists, crosstabs, icons, titles, subtotals, totals and charts<br>• Each page of a tabbed layout will render as its own worksheet |
| Excel data | | • Contains raw data of report<br>• Report formatting (e.g., titles, charts, icons) are dropped and data is returned in spreadsheet format<br>• Only the first page of tabbed layouts will appear |
| CSV | | • Exported data which is tab-delimited and can be imported to (or read by) other software<br>• Strings are not enclosed in quotation marks<br>• Show only the results of the report query<br>• Page layout items, titles, images, totals and subtotals do not appear |

## Prompts

Many of our reports have a prompt page that we see prior to the report's execution.  This helps make reports more versatile by allowing users to select targeted data for the report.  It also helps the report process faster by limiting the amount of data coming back from the database.

- Prompts can be on one or more pages
- Prompts can be required or optional – an asterisk* indicates the prompt is required
- Finish/Submit/Run buttons are grayed out until a mandatory prompt is selected
- Some prompts only allow you to choose one option, while others let you multi-select
- CTRL+click to select multiple values within the prompt box
- For convenience, some prompts have Select All and De-Select All links below the prompt
- If prompts are optional and none are selected, the report will probably take longer to complete

Not all prompt pages look the same!

# Report Options

The options available to you depend on the type of report you're viewing as well as your security access in Enterprise Analytics.

*Here are some tips to get started with the options we will cover in the next few sections:*

- *If you want to have it sent to you and others, create a **Report View** and **Schedule** it*
- *If you entered prompt and parameter values that you want to save (so you don't have to enter them each time you go to run the report), save the report as a **Report View***
- *If it is an important report or somewhere you'll visit or start from each day, you can set it as your **Home Page***
- *If you want to see and typically run a report on a regular basis, **Subscribe** to it*

## Report Views

Creating a Report View is simply storing the output of the report in a specified format (e.g., HTML, PDF) for specified prompt conditions. Report Views are a combination of a shortcut and a dynamic copy of the original report. So, if you have a report that you want to run with different prompt values, schedules, delivery methods, run options, or output formats, you can create one (or more!) Report View(s).

The Report View will always refer to the report from which it was created. Any changes or modifications that are made to the original report, after creating the Report View, will not be captured in the Report View until you re-run it.

*Creating a report view does not change the original report. In the Properties panel for the Report View, you will see a link to the source report.*
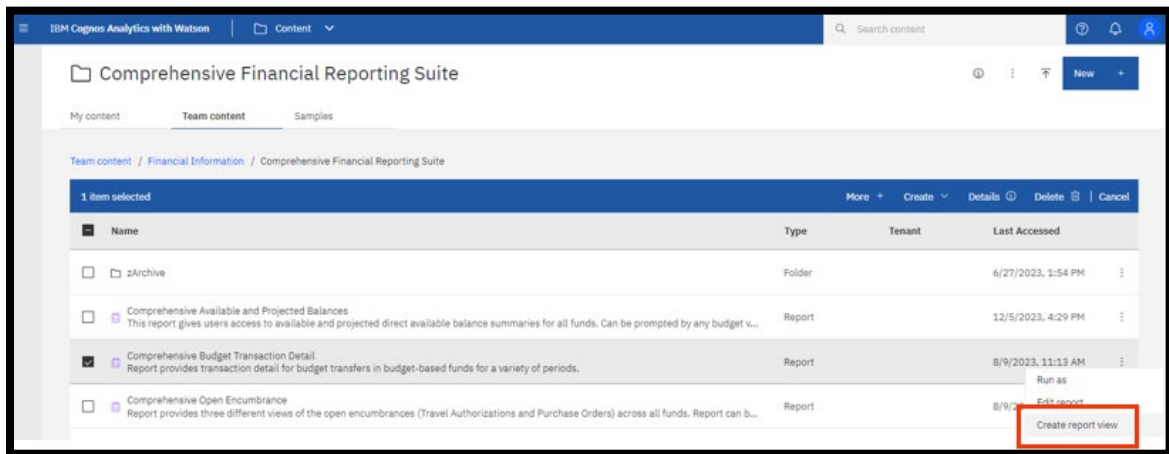
If you would like to edit the prompt values for the Report View, open the **Properties** panel.

*If the source report is moved to another location, the Report View link is maintained. However, if the source report is deleted, the Report View link will break.*

To create a new report view with set prompt values:

1. Click the **Action Menu** then select **Create report view**.



2. Name the report as desired and save to your **My Content** folder:, click **save**.
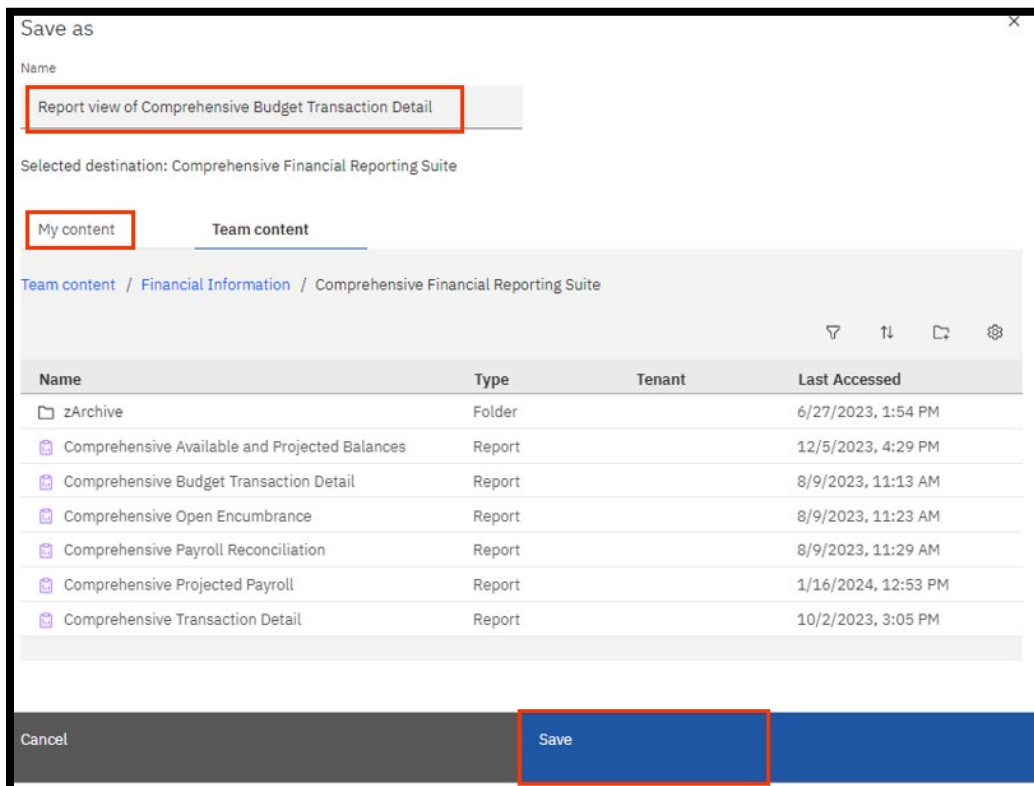


3. Navigate to the report view, click the **Action Menu** and select **Properties**.
4. Select the **Report** tab.

5. Select the **No** radio button under Prompt for values.
6. Click **Set Values**.
7. Set the **Required** and **Optional** prompts and then click **Run Report** .
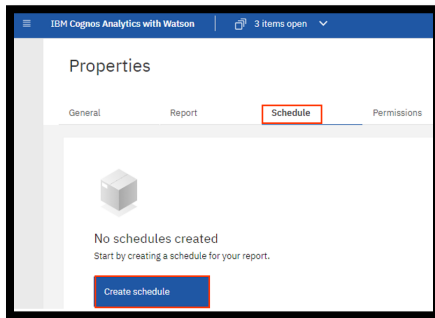


## Schedules

Whether you need to run your report on a daily basis or only every so often, the Scheduling Tool in Enterprise Analytics makes it possible to schedule your reports to run automatically, as frequently as you need.

A report can only have one schedule associated with it, so you will need to create a Report View (or multiple report views, as needed) for each schedule you want to create.   This keeps the original report intact and allows you to create as many unique schedules for each report view as necessary.
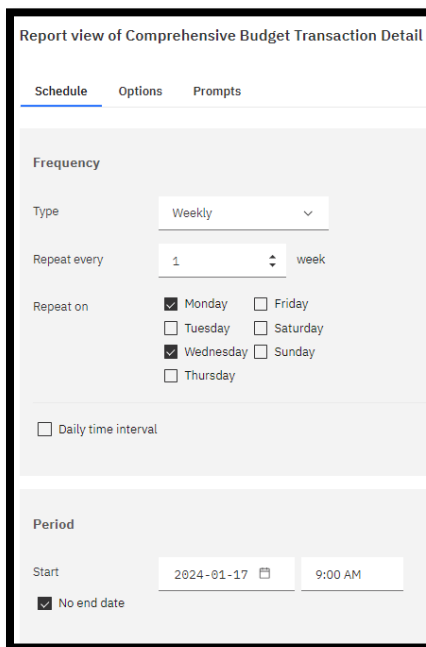
Each schedule can have a different frequency, distribution, and delivery option attached to it.

To create a new schedule on a report or report view:

1. Navigate to the **Properties** of the report or report view.
2. Click the **Schedule** tab and click **Create schedule**



3. Select when and how frequently you would like to receive the report on **Schedule** tab.



4. Review and customize report format and delivery on the **Options** Tab

**1** Format: Choose from listed output types.

**2** Delivery: Choose your report delivery method. If you are trying to send the report via email to multiple people or create a custom subject and message, select the "edit details" button to the left of that delivery method.

5. Click on the **Options** Tab and select Send the report by email. Set email options by clicking Edit Details.

*If using the email option for report distribution, please consider the following:*

- *report content (FERPA, HIPPA or other security restrictions)*
- *output type and size selected (Excel, PDF, HTML, etc.)*
- *report recipients' access to Cognos*

*To ensure the user has appropriate access to the data, it is best practice to use the "include link" option vs attach report output in the edit details tab.*

6. **Prompts** Tab – prompt values should be set on the Report View, not on the schedule itself.

## Subscriptions

Enterprise Analytics has a new feature called Subscriptions, which is available when viewing a report. **Subscribe** allows the user to schedule a personal copy (or report view) of the report more quickly.

If you use a report regularly, you might want to **Subscribe** to it. The **Subscribe** feature can only be used once the report has been run and is then found under the **More (…)** button.



When you **Subscribe**, you pick the time, date, format, and where you want it to be delivered. The subscription includes all your prompt and parameter values.



Creating subscriptions automatically creates a Report View in your **My Content**. The reports you subscribe to will be delivered (to you only) with your custom prompt values and options.

After you have subscribed to a report, you are notified each time it is delivered. Click the **Notifications** (bell) icon to view any messages, which will contain a link to view the report output.

## Managing Your Schedules and Subscriptions

You can view and manage all of your schedules and subscriptions by selecting **My Schedules and Subscriptions** from the **Personal Menu**.
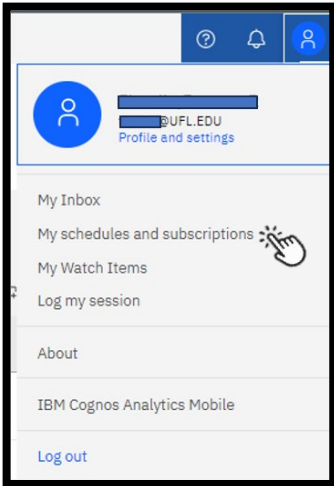


Easily change between your current, past, upcoming or scheduled reports by changing the option in the dropdown menu.
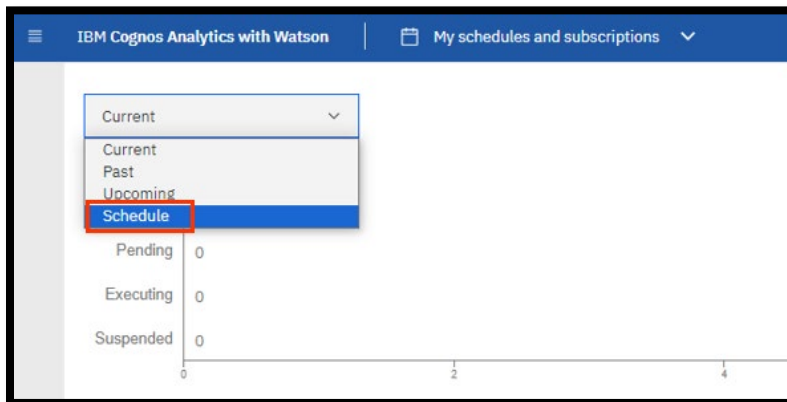
View Past report runs and sort by Name, Request time, Type, and Status.  Most Customers will only see their own report executions.
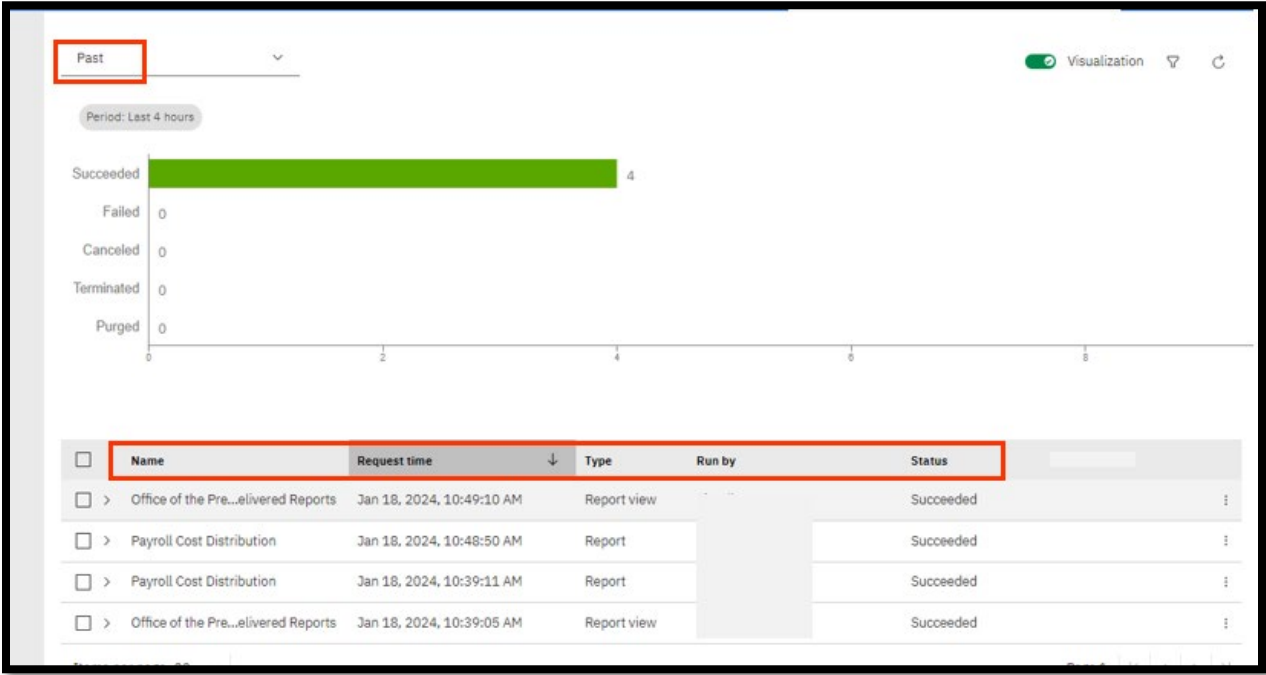


You can enable, disable, modify, or delete **Schedules or Subscriptions** and view their saved outputs or archived versions. If you view the versions, you can also open the version details panel for information such as the run status, error messages, and run time.
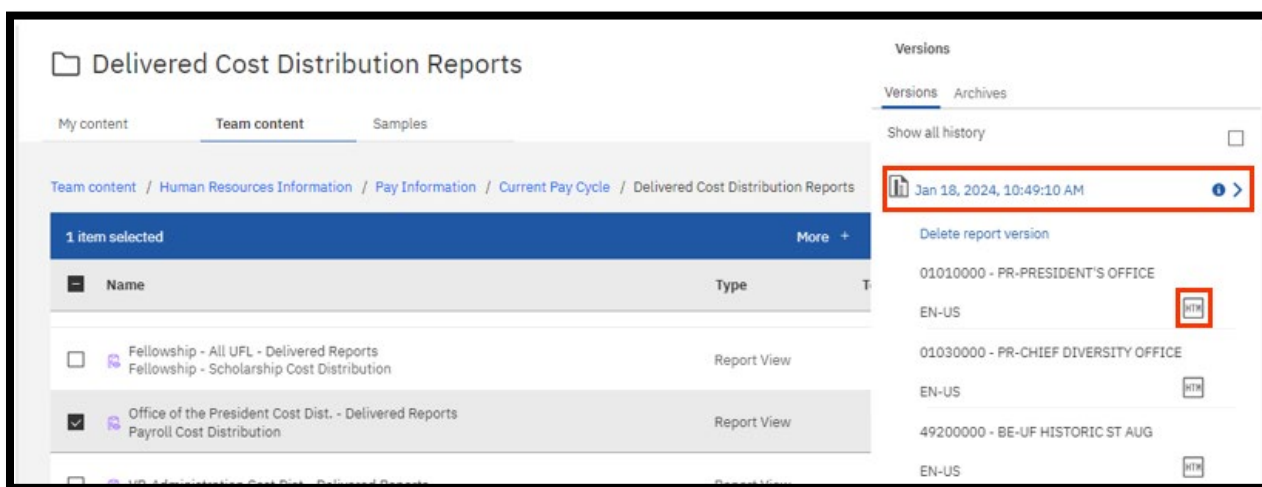
## Report Versions

If you run reports, you will see the latest data from the data source at the time you run the report. However, when you view report versions and outputs, such as when a report you **Subscribe** to is delivered, you are viewing the data that was captured when you saved the version or view of the report.

To view report versions and archived versions:

1.  For a report in a content list, click the **More (…)** button and then select **View Versions**
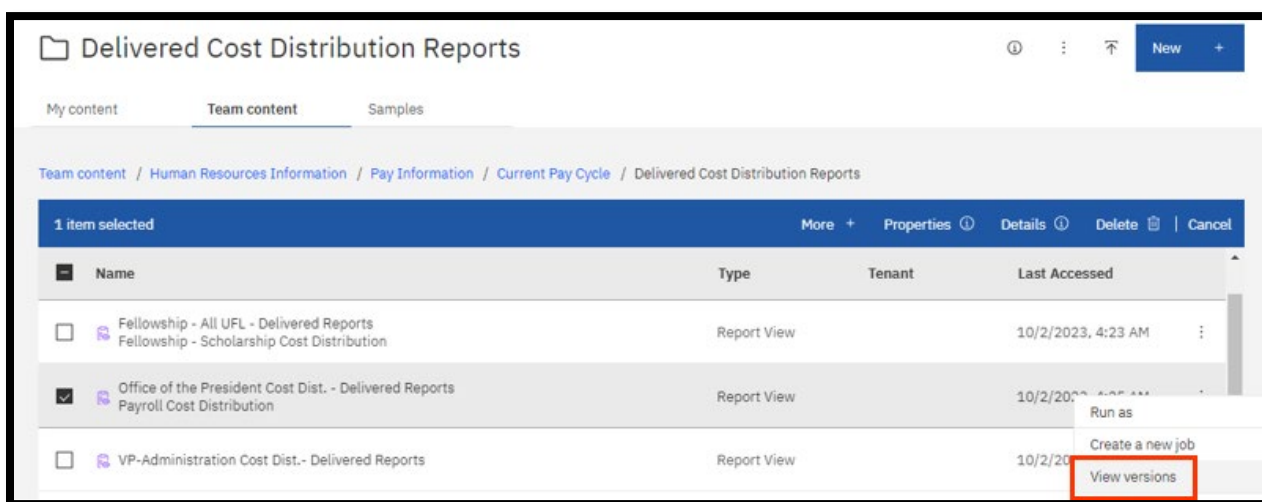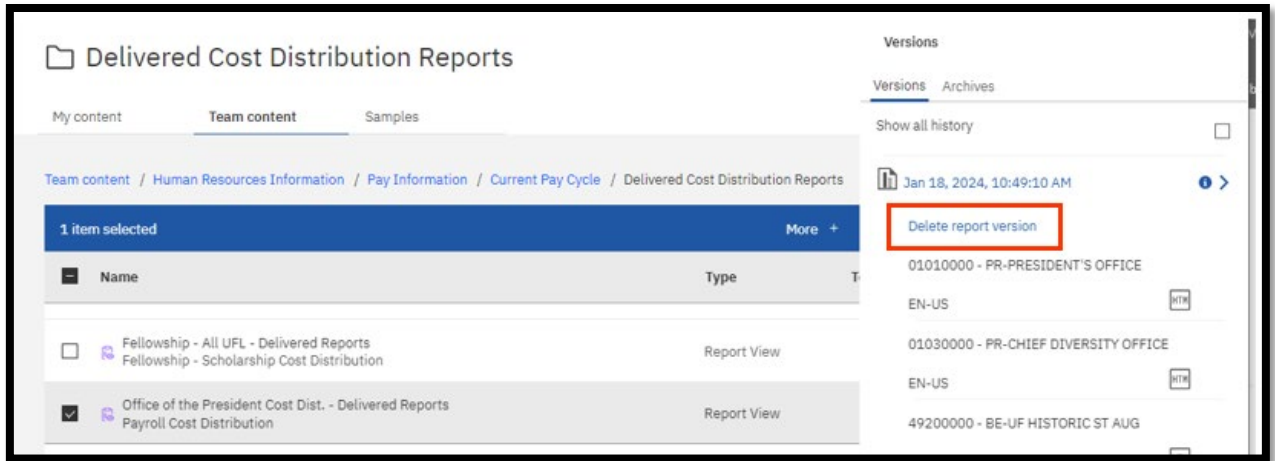


2.  This will open up the list of available versions



3.  Click on the date to show the output format of that version and click on the format to open the pre-run (delivered) report with the prompts and parameters from that version

To delete saved report versions:

1.  Click the **More (…)** button
2.  Select **View versions** and click on an entry in the list
3.  Select **Delete report version**

*Deleting removes all saved output formats of the version.*

# Thank You and Additional Assistance

Thank you for taking the time to review our **Introductory Enterprise Analytics User Guide**. We hope you found it useful in understanding the navigation and reporting capabilities of Enterprise Analytics.

We are currently working on more resources and trainings to better support our community in Enterprise Analytics. For news, resources and trainings please visit our new Enterprise Analytics Team within Microsoft Teams.

## For Additional Assistance

**Enterprise Analytics and Reporting**
UF Reporting Services
Reporting-Services@ufl.edu

**User Guide Enhancements**
CFO Finance Strategy & Analytics
Contact Us