

ENTERPRISE ANALYTICS

Getting Started User Guide

Table of Contents

- Navigation 3
- Running Reports in Enterprise Analytics, Reporting Prompts, Export Reports (Excel, PDF)..... 7
- Customize existing reports (filtering, sorting, grouping, etc) 10
- Schedule and Automate Report Delivery 12
- Additional Resources..... 13

Accessing the Enterprise Reporting System

To access the Enterprise Reporting system, login to myUFL and navigate to:

Main Menu >> Enterprise Analytics >> Access Enterprise Analytics

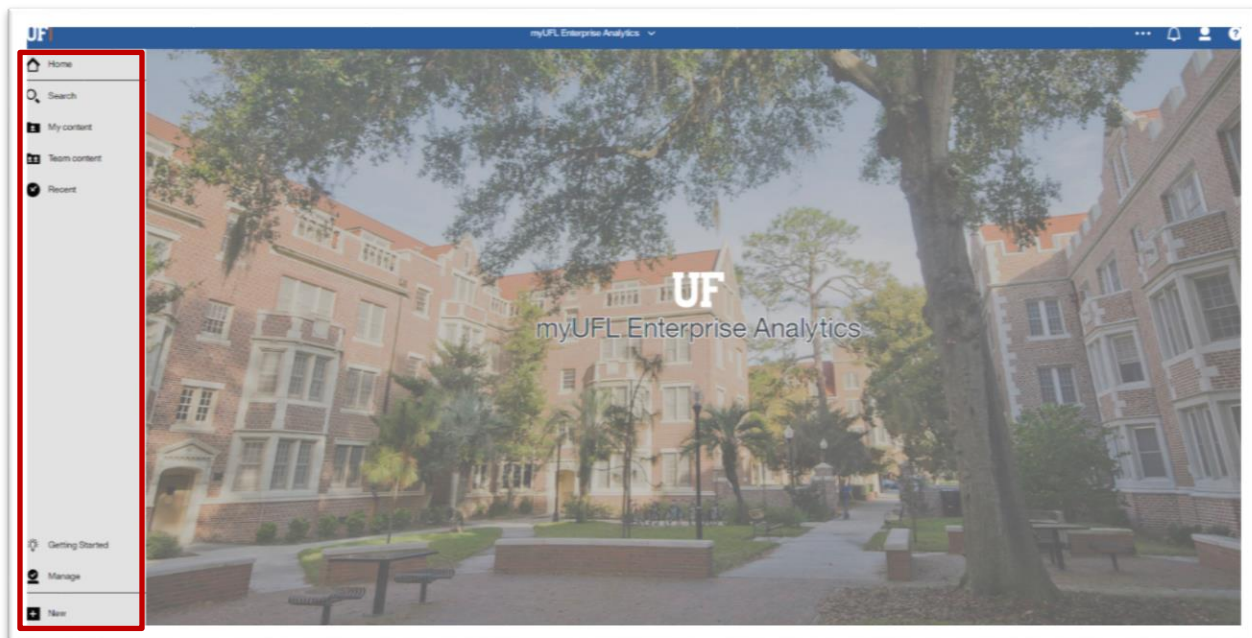
Navigation

1. Top Navigation.

- The icons at the top left corner of the Enterprise Analytics home screen include:
 - **More icon:** context sensitive content depending on where you are in the system.
 - **Bell icon:** provides alerts for notifications (such as when a scheduled report has been run or sent).
 - **Person icon:** set personal preferences (such as rows per page in HTML output format).
 - **Question icon:** access to the help, tool specific.

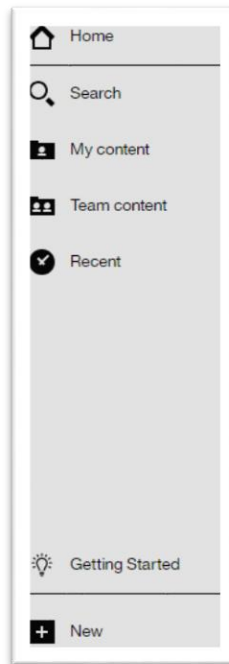


2. Left side navigation panel.

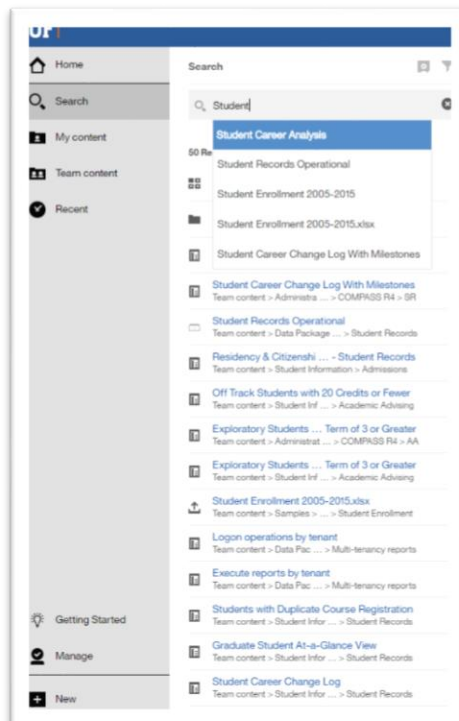


The left navigation menu contains:

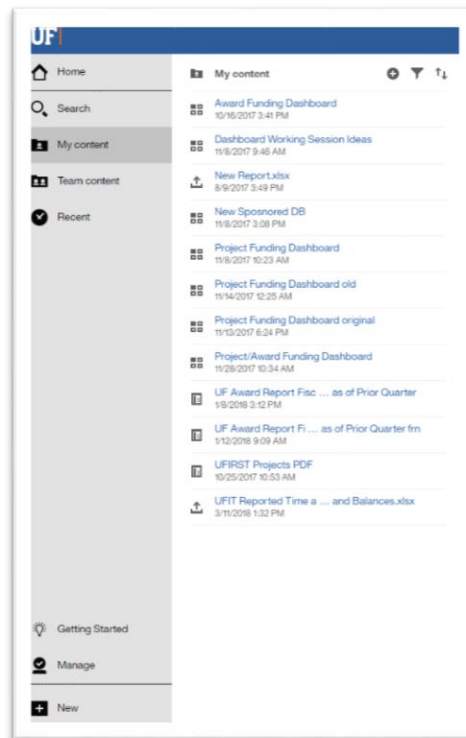
- **Home:** returns you to the home screen.



- **Search:** search functionality for finding reports.



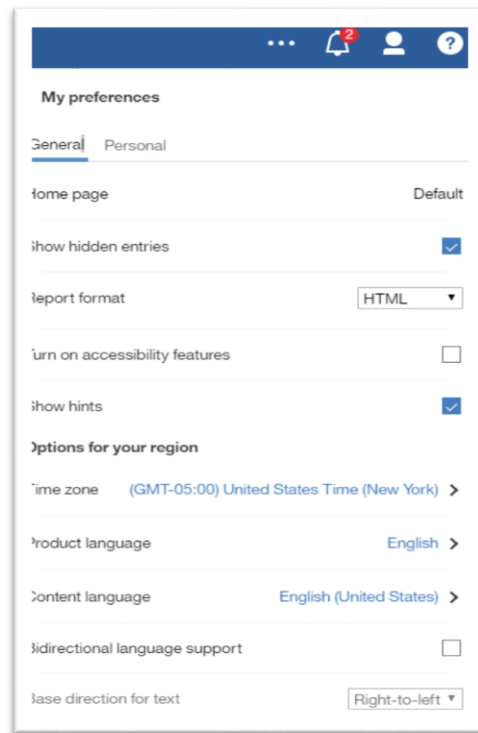
- **My content:** (previously My Folders). Personal folder for saving reports. No one else has access to this folder.



- **Team content:** (previously Public folders). Contains the content you have access to based on your security role.
- **Recent:** most recently viewed reports, data models, uploaded files (public or personal content).
- **Getting Started:** contains help videos.
- **Manage:** used to create jobs, edit security, user groups, etc. This menu is only viewable by system administrators.
- **New:** click to create a new report, dashboard or upload your own CSV or Excel file.

3. Set your Preferences.

- Click the Person icon on the home screen to set your Preferences.
- Options include:
 - Home screen settings
 - Show/Hide hidden entries
 - Report format



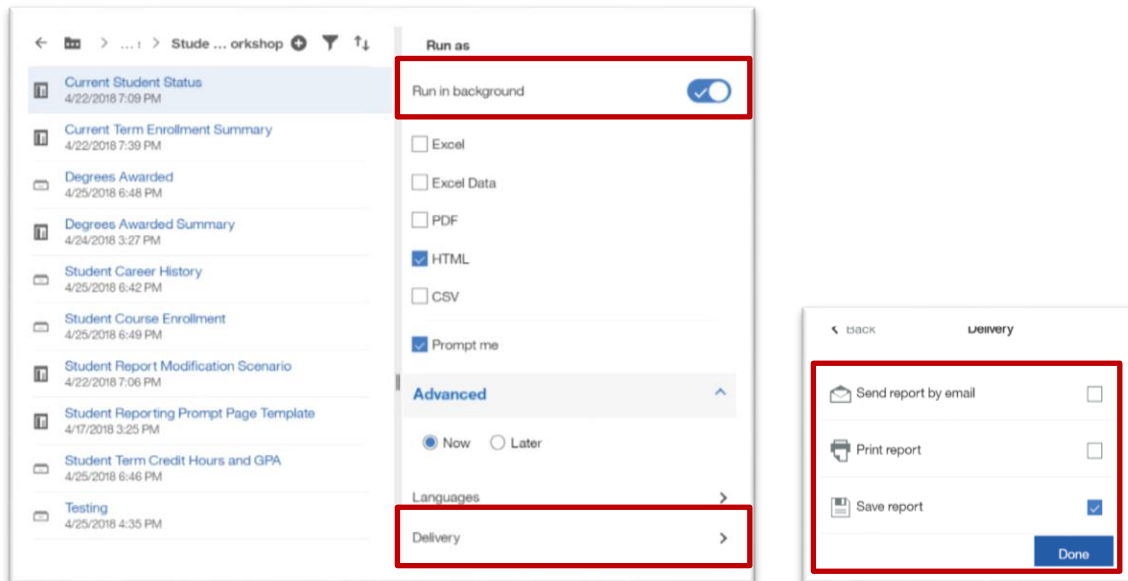
4. Operating the Enterprise Analytics menu system.

- Drag to expand menus. The expanded menu shows the menu breadcrumbs.
- Menus have filter and sort to help locate reports.

Running Reports in Enterprise Analytics, Reporting Prompts, and Exporting Reports (Excel, PDF)

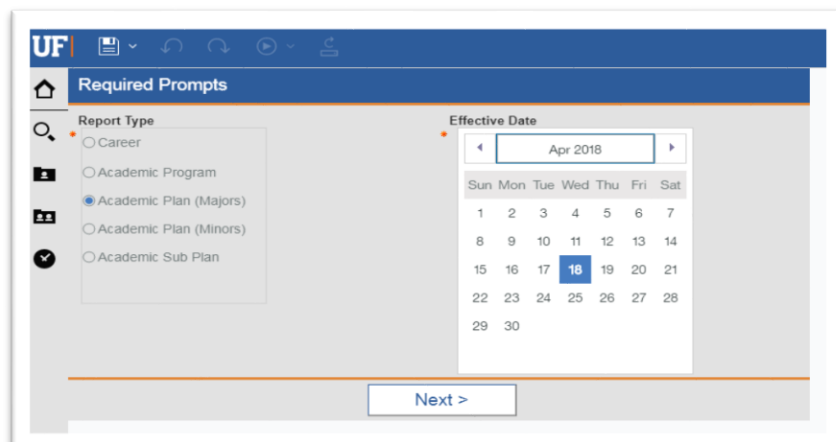
1. Running a report.

- To run a report in Enterprise Analytics, click on the report name.
- Click on MORE (...) to the right of the report name and select 'Run As'. This allows you to change the default output, runtime, and delivery method (save or email)



2. Reporting prompts.

- After running a report, select your prompt options.
- Based on the report type, there are Required Prompts (you must make a selection) and Optional Prompts (make a selection as needed).



- Additional Prompt Options/Types

- Click Finish to run the report.

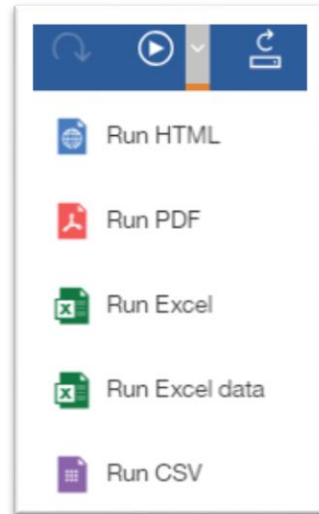
3. Exporting Reports.

- Reports can be downloaded in several different formats. To export a report, click the down arrow next to the Play button.



- The default output type is HTML, which gives you the most options for interacting with data.

- Select the format type you would like to download.
- The report loads in the selected output type.

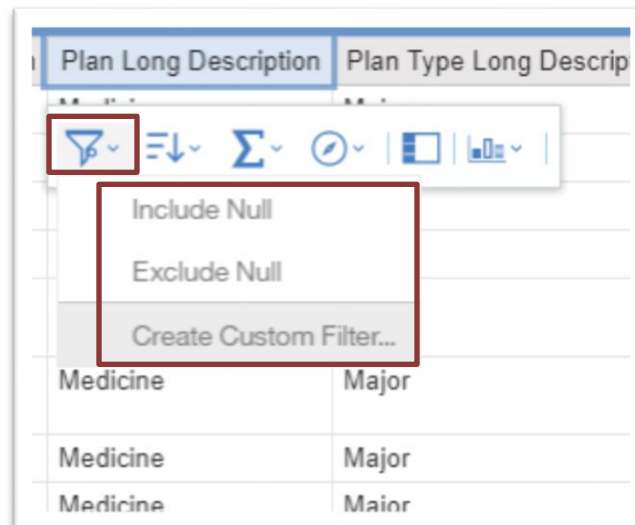


Customizing Reports

After opening a report, the way the report displays can be customized.

1. Filtering Reports.

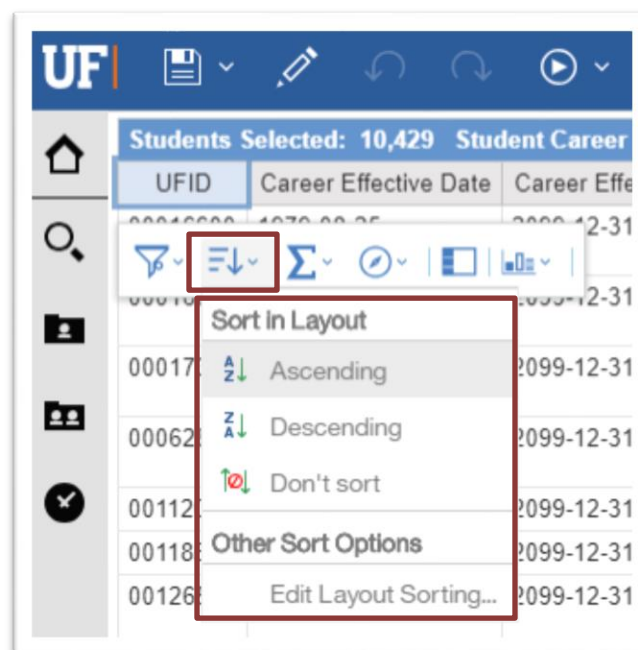
- Open a report, then click on any of the report headings to filter.



- Enter the filter options needed, then click Ok.

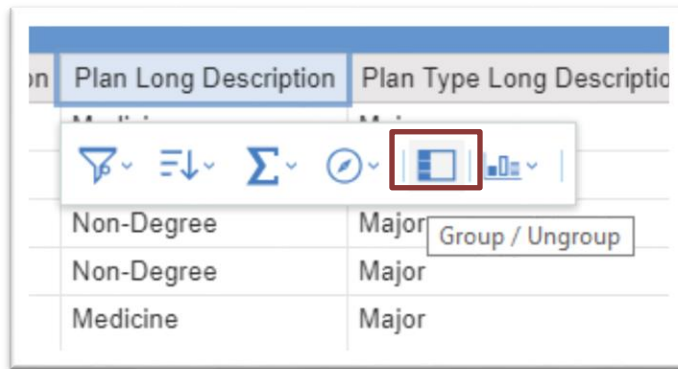
2. Sorting reports.

- Open a report, then click on any of the report headings to sort.
 - Click the sort button, then select the sort type.





3. Group/Ungrouping

- Report data sets can also be grouped and ungrouped, depending on how you want to view the report.
- To group or ungroup data, open a report and click on any report header.
- Click the Group/Ungroup button.

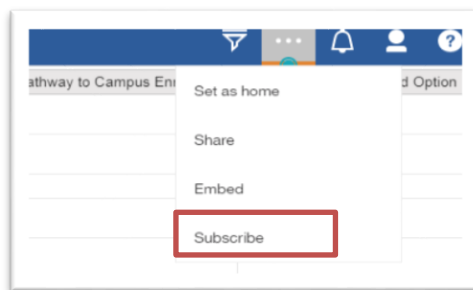


4. Save a report version

- In the application bar, when you view a report, tap either  , or  . The location of the save option depends on the type of report you view.
- You also have the **Save as** option of saving the report version under a different name or in a different location.

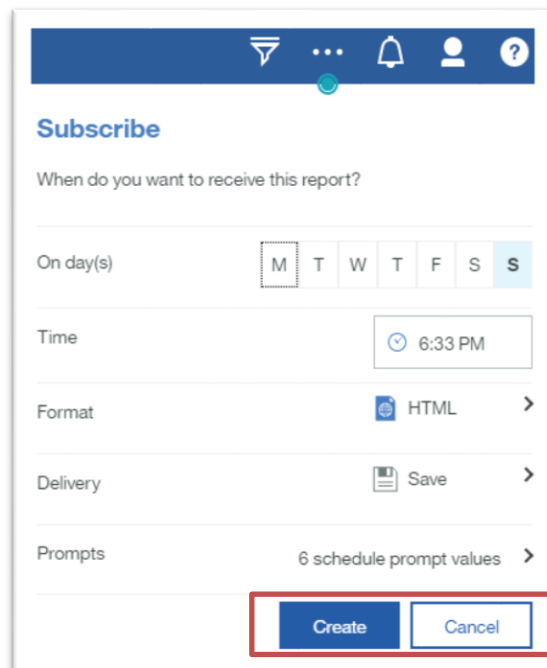
Subscribing to a Report (Schedule and Automate Report Delivery)

- If you use an Enterprise Analytics report regularly, you can subscribe to it. When you subscribe, you pick the time, date, format, and where you want it delivered.
- When you subscribe to a report, the subscription includes all your prompt and parameter values.
- The subscription option is only available when you run and view a report, but not when you are in editing mode or when you view saved output. If you edit a report, you must save it before you can subscribe.
- **NOTE:** You may only have one subscription per report. If you want to have several different versions of the same report delivered, then you must create a view for each subscription.
- To schedule a report, click on the three dots icon. Select Subscribe.



- Pick the scheduling options.

- Click Create.

A screenshot of the 'Subscribe' dialog box. The dialog has a title bar with a blue header. Below the title, it asks 'When do you want to receive this report?'. There are several sections: 'On day(s)' with a calendar view showing 'M' selected; 'Time' with a clock icon and '6:33 PM' selected; 'Format' with a dropdown menu showing 'HTML'; 'Delivery' with a dropdown menu showing 'Save'; and 'Prompts' with a dropdown menu showing '6 schedule prompt values'. At the bottom, there are two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a red rectangular box.

Additional Resources

Online Training via myTraining:

- Dashboards – ERA100
- Report Authoring – ERA200

Monthly Reporting Open Labs

- **WHO:** Reporting Services Team and YOU!
- **WHAT:** Open Lab for campus Reporting users to bring their questions or reporting needs and receive personal assistance from a member of the Reporting Services Team
- **WHEN:** 3:00 – 4:30 on the 2nd Wednesday of each month
- **WHERE:** HR Building room 119
- **REGISTER:** via myTraining in myUFL for UF_PST919_ILT

Navigation: Main Menu > My Self Service > Training and Development > myTraining

HR Toolkits

<https://learn-and-grow.hr.ufl.edu/toolkits-resource-center/enterprise-analytics/>

Data Dictionaries and Entity-Relationship Diagrams:

Student Career History

<http://data.ufl.edu/data-management/student-data/>

Student Enrollment

http://data.ufl.edu/media/dataufledu/non-image-files/Enrollment_course_model_v2.pdf

Data Dictionary

http://data.ufl.edu/media/dataufledu/non-image-files/Reporting_Student_Data_Model_Dictionary.xlsx

FI, HR, or Sponsored Programs Related Reporting or Analytics Assistance:

- Email Reporting-Services@ufl.edu and a member of OUR or the Reporting and Analytics team will assist you.

Student Related Reporting or Analytics Assistance:

- Email Student-Reporting-Services@ufl.edu and a member of OUR or the Reporting and Analytics team will assist you.

IBM Delivered Resources

IBM Hands-On Labs for Cognos Analytics 11.1.3

- <https://www.ibm.com/demos/collection/IBM-Cognos-Analytics/>

IBM Cognos 11.1.3 What's New

- https://www.ibm.com/support/knowledgecenter/en/SSEP7J_11.1.0/com.ibm.swg.ba.cognos.ca_new.doc/c_ca_nf_11_1_3_container.html

Getting started in IBM Cognos Analytics – Reporting

- https://www.ibm.com/support/knowledgecenter/en/SSEP7J_11.1.0/com.ibm.swg.ba.cognos.ug_cr_rptstd.doc/c_understand_rs.html