

SCHEDULE A REPORT

The following instructions will walk you through the process of scheduling a report.

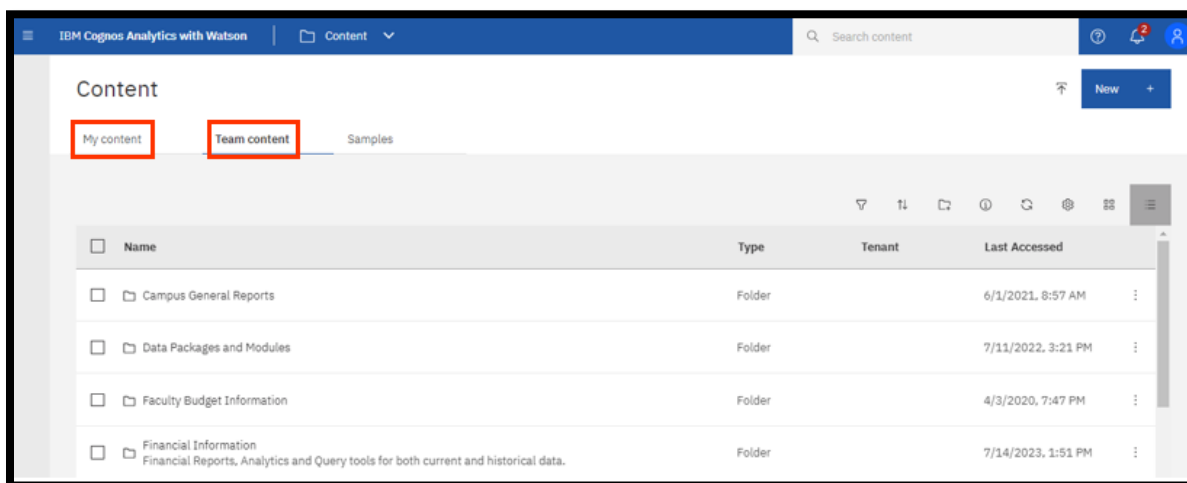
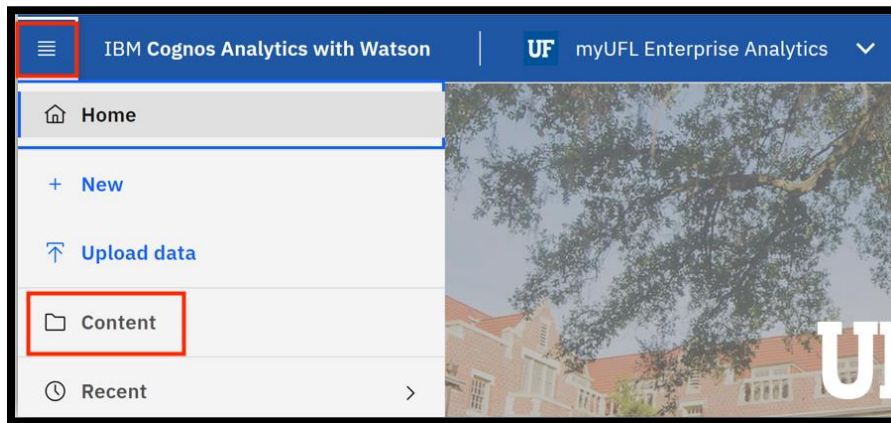
NAVIGATION

Login into myUFL and navigate to:

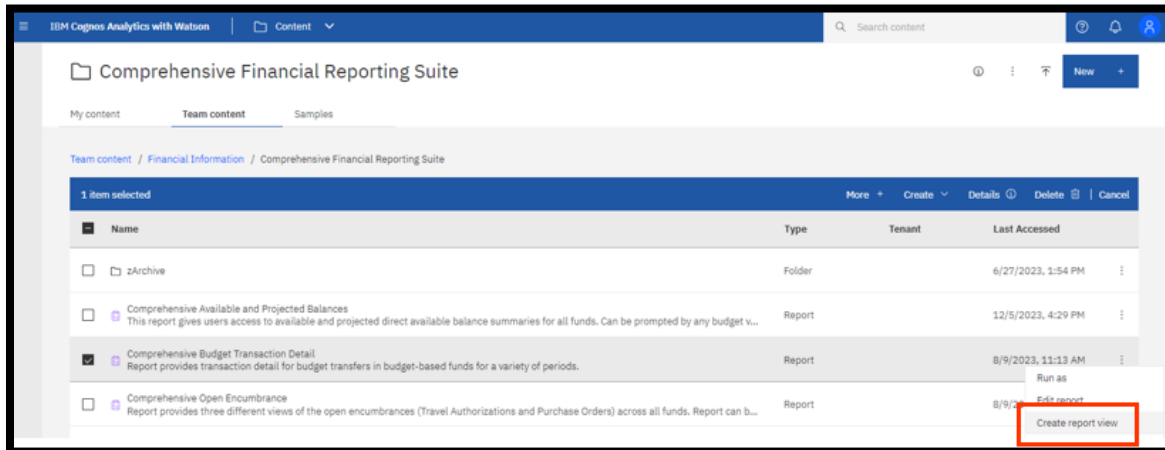
Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics

CREATE REPORT VIEW

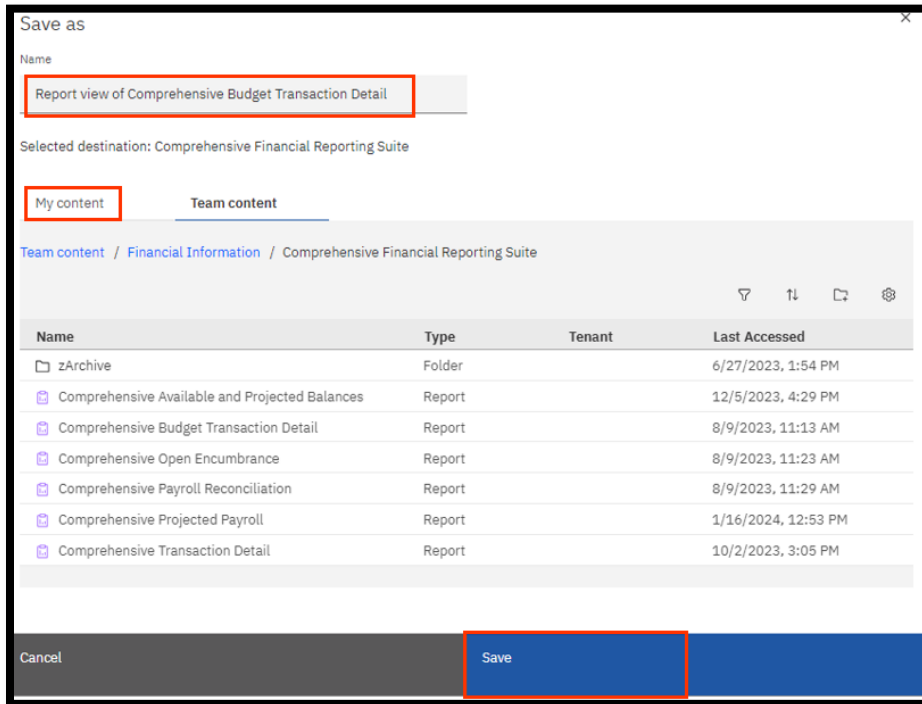
1. Click on the Navigation menu to expand the menu options. Select 'Content' to access 'My Content' and 'Team Content' folders.



- To create a new report view with set prompt values:
- Click the **Action Menu** then select **Create report view**.

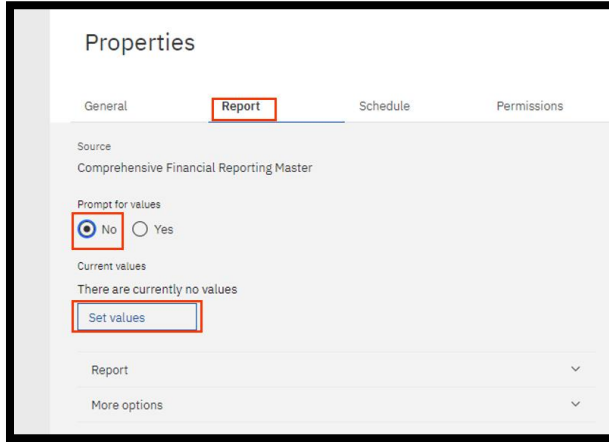


- Next Name the report as desired and save to your **My Content** folder; click **save**.

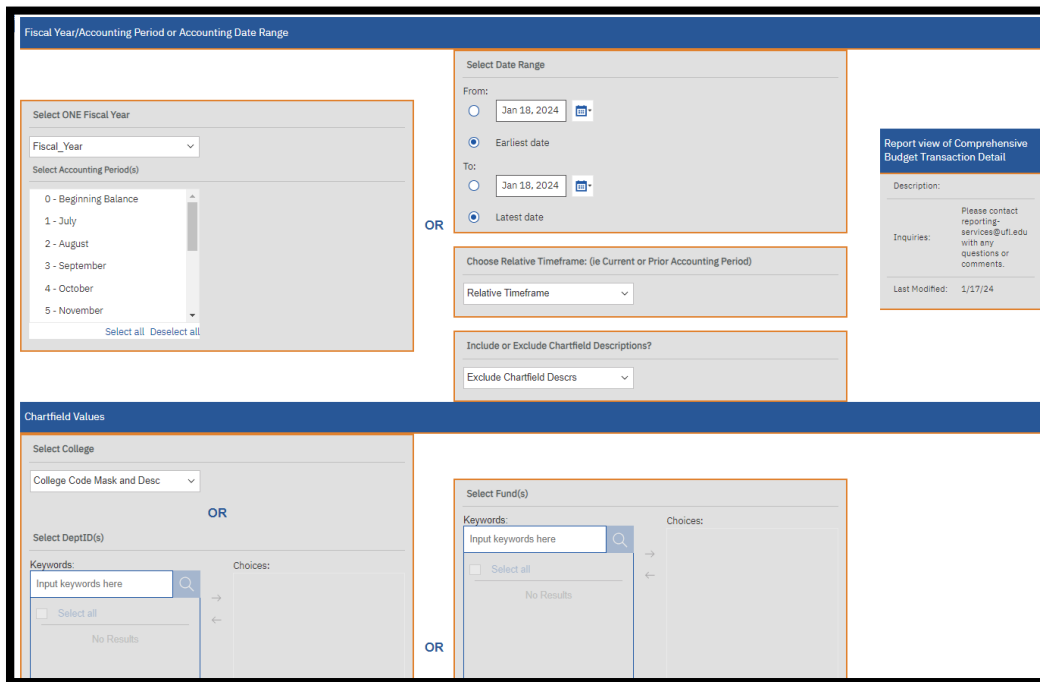


- Navigate to the report view, click the **Action Menu** and select **Properties**.

6. Select the **Report** tab.



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



SCHEDULES

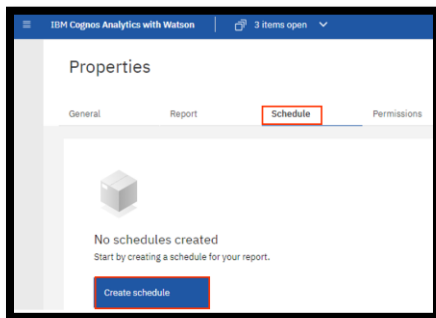
Whether you need to run your report on a daily basis or only every so often, the Scheduling Tool in Enterprise Analytics makes it possible to schedule your reports to run automatically, as frequently as you need.

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.

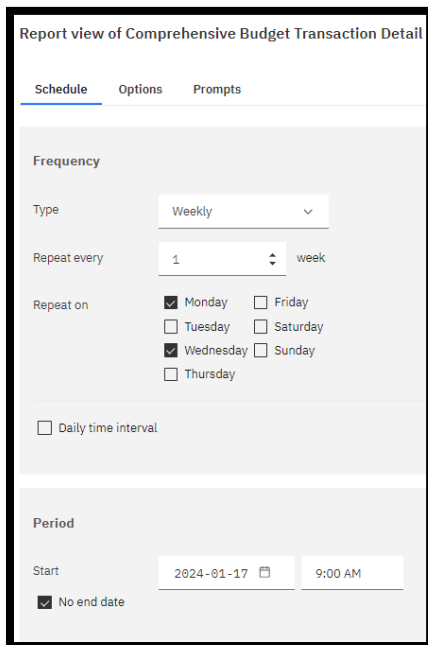
Each schedule can have a different frequency, distribution, and delivery option attached to it.

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

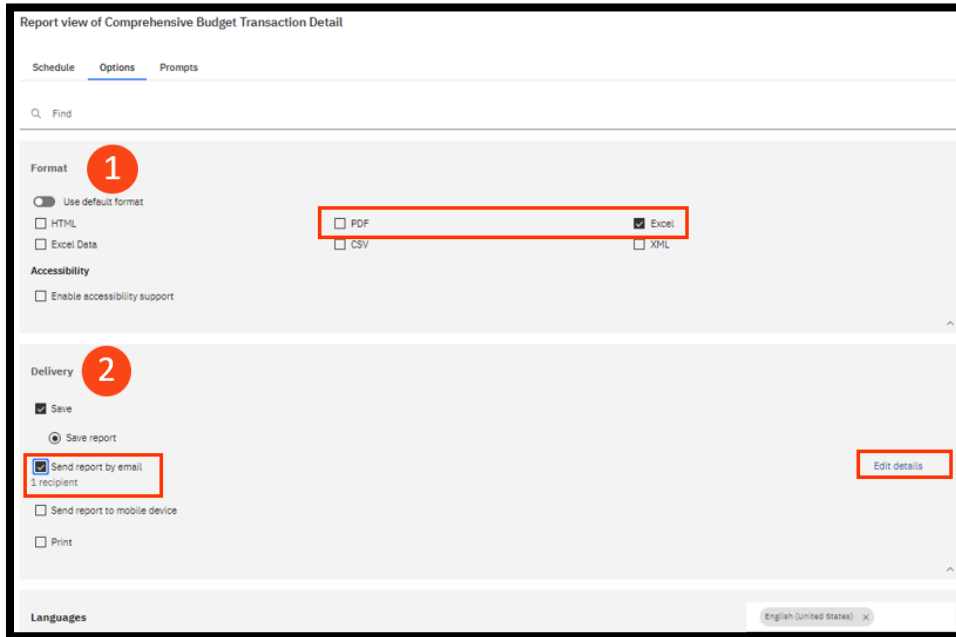
1. Navigate to the **Properties** of the report or report view.
2. Click the **Schedule** tab and click **Create schedule**



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.

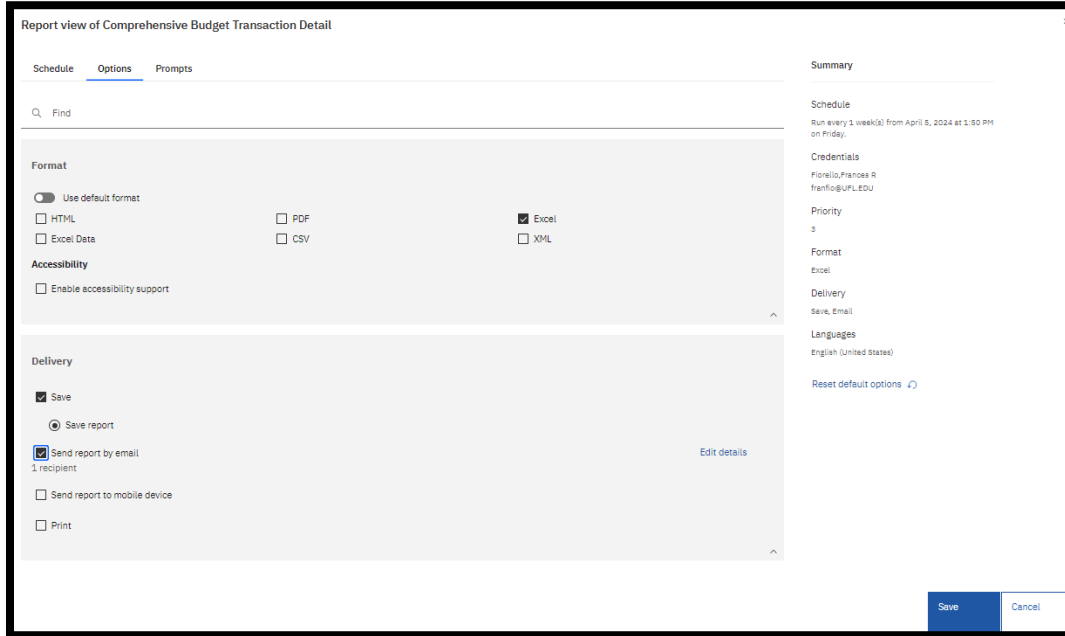


If using the email option for report distribution, please consider the following:

- *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.
7. Click the **Save** button to save the schedule.



8. Click the **Close** button to save your changes.

