

SCHEDULE A REPORT

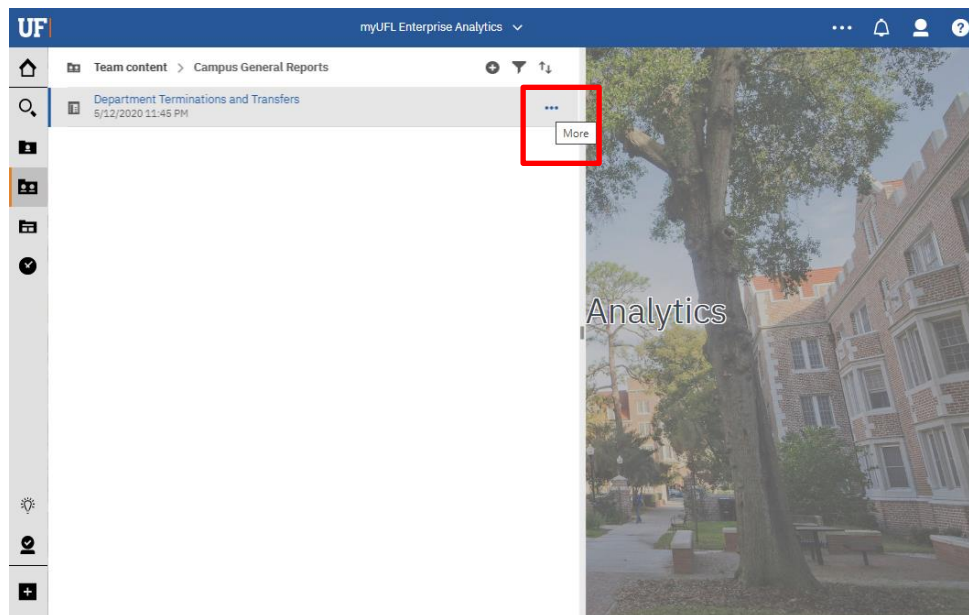
The following instructions will walk you through the process of scheduling a report.

NAVIGATION

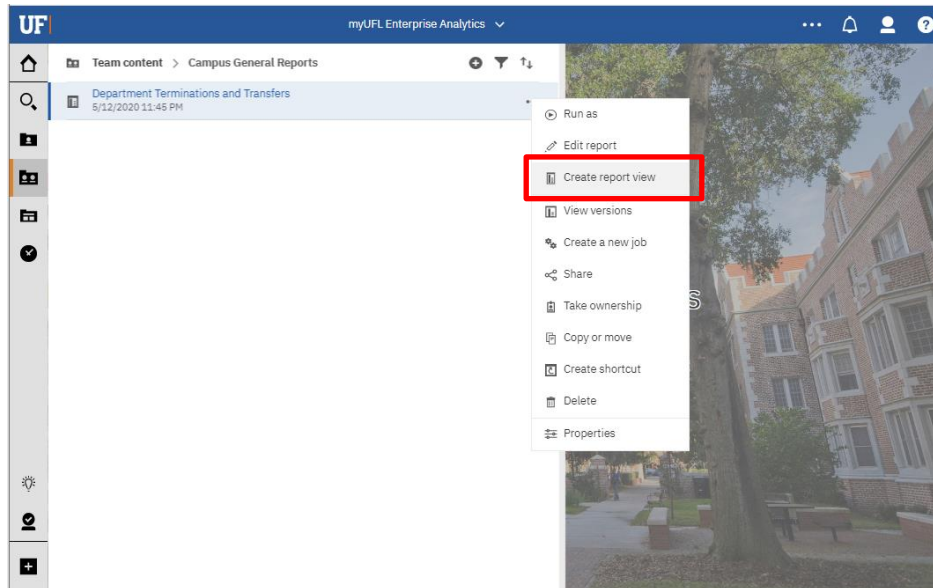
Login into myUFL and navigate to:

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

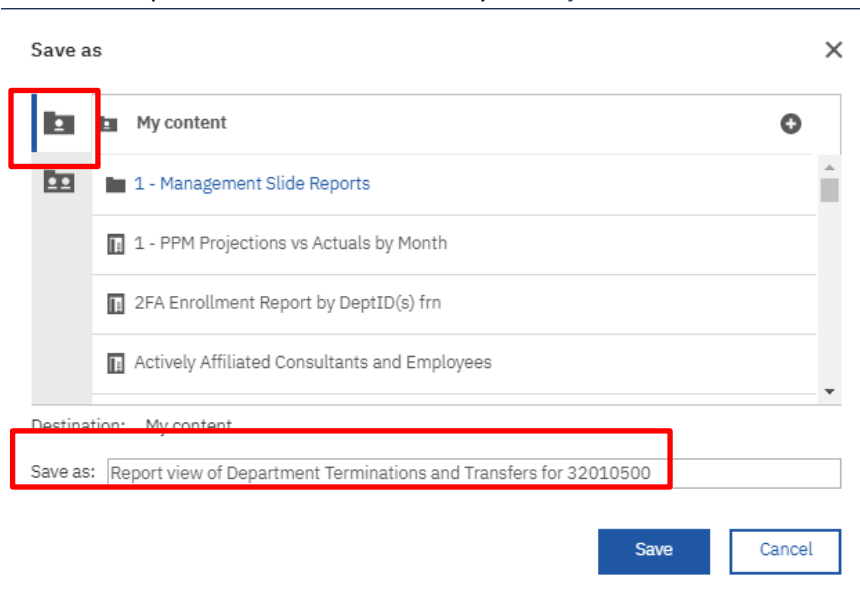
1. To open a report, click on the **My Content folder** or the **Team Content folder**.
 - The My Content folder is used for your personal reports.
 - The Team Content folder is used for reports shared by you and other members of your team.
2. Navigate to the Report
3. Click the **More** option(ellipses)



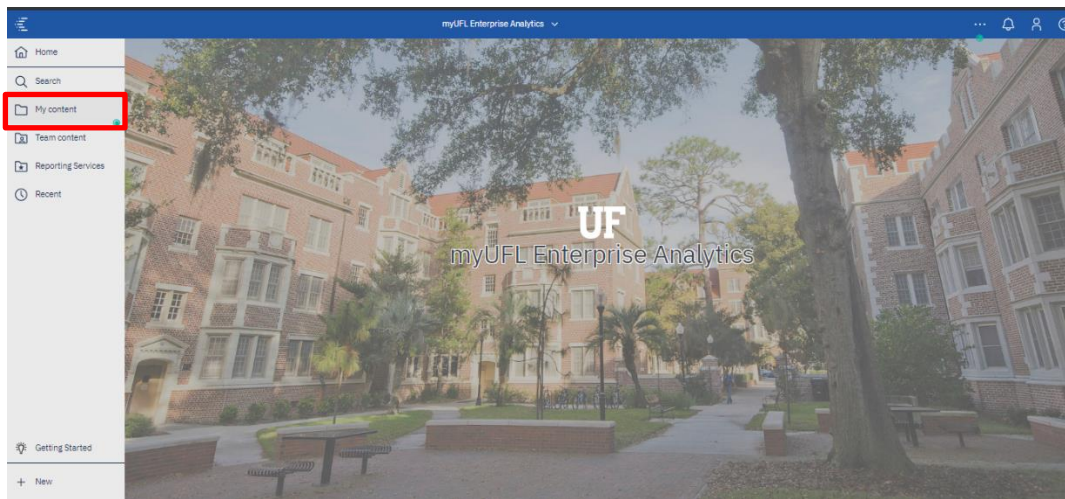
4. Select **Create report view**



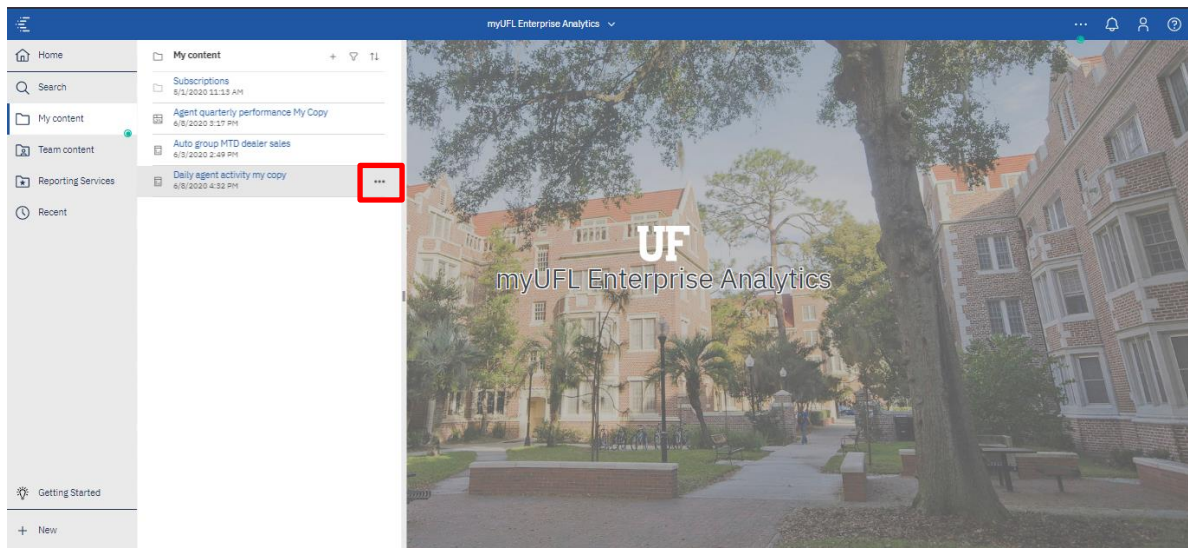
5. Name the report as desired and save to your **My Content** folder:



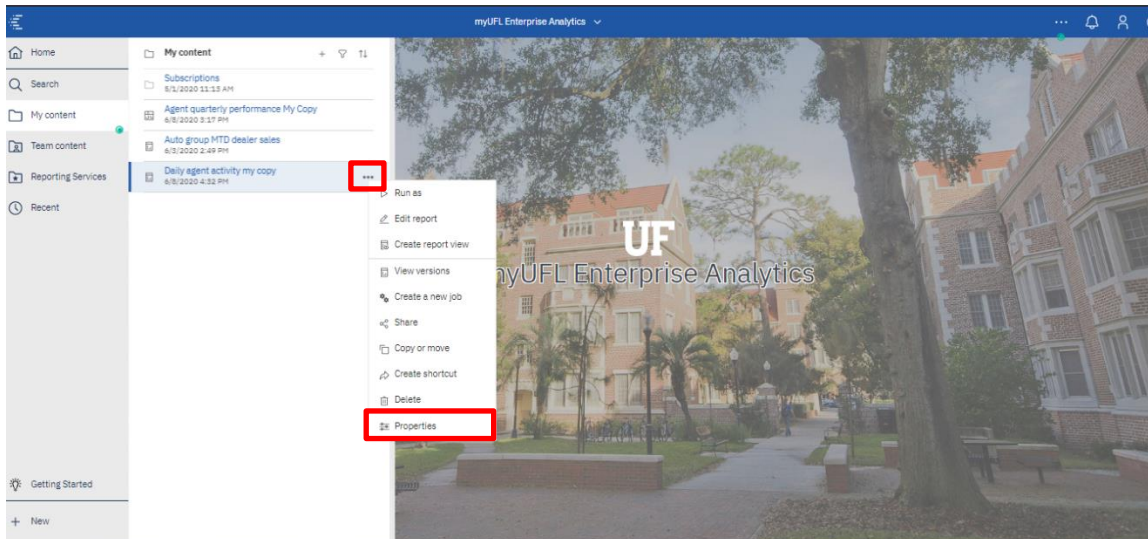
6. Navigate to the saved report view in your My Content



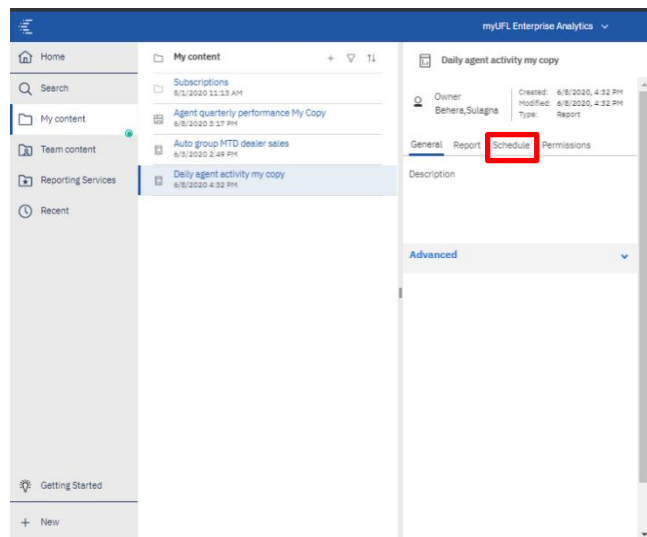
7. Click the **More** icon.



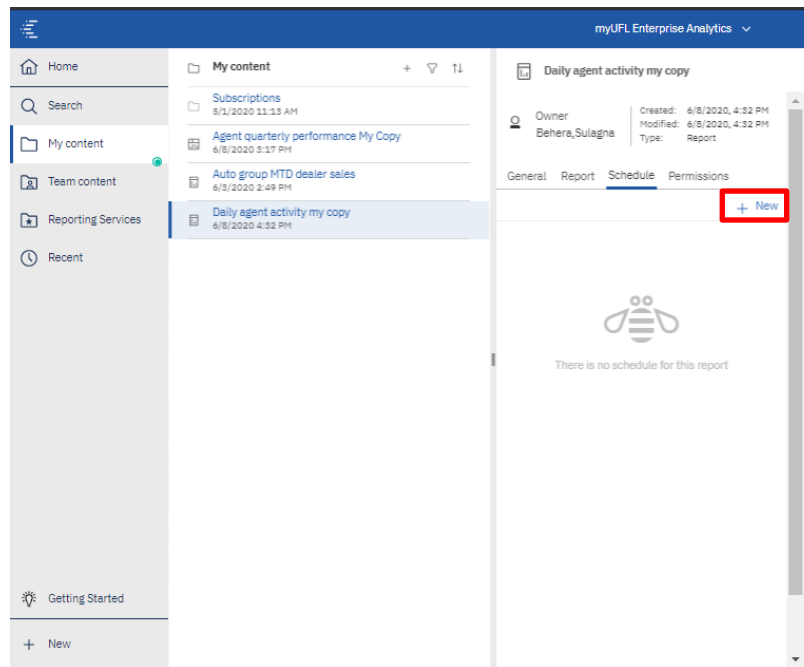
8. Click **Properties**.



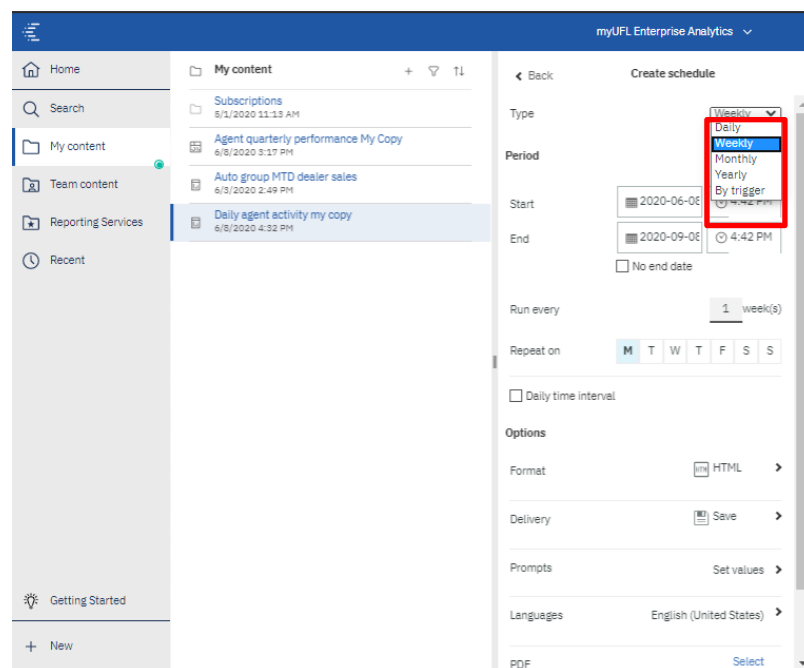
9. Click **Schedule**.



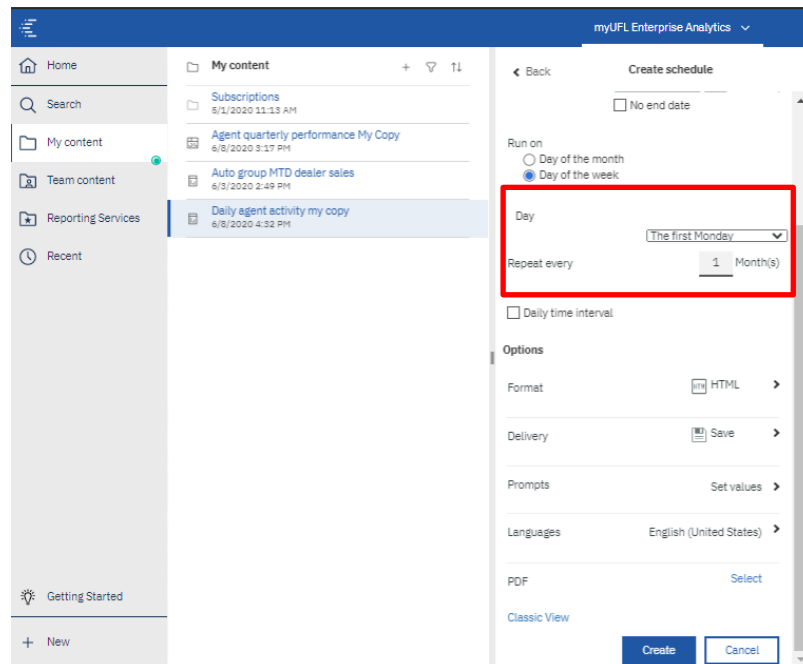
10. Click the **New** icon.



11. Select how frequently you would like to schedule the report.



12. Select when and how often you'd like to receive the report.



myUFL Enterprise Analytics

Home Search My content Team content Reporting Services Recent

My content

- Subscriptions
 - 8/1/2020 11:13 AM
 - Agent quarterly performance My Copy 6/8/2020 3:17 PM
 - Auto group MTD dealer sales 6/3/2020 2:49 PM
 - Daily agent activity my copy 6/8/2020 4:32 PM

Create schedule

Back

No end date

Run on

Day of the month

Day of the week

Day

The first Monday

Repeat every

1 Month(s)

Daily time interval

Options

Format

HTML

Delivery

Save

Prompts

Set values

Languages

English (United States)

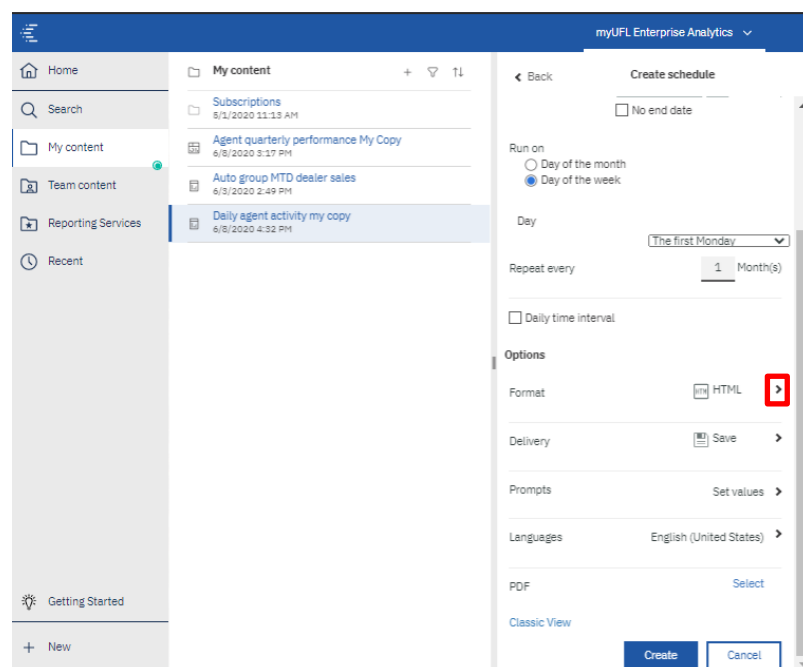
PDF

Select

Classic View

Create Cancel

13. Use the format section to select the type of format you would like to receive the report in. Click the **arrow icon** next to format type.



myUFL Enterprise Analytics

Home Search My content Team content Reporting Services Recent

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HTML

Delivery

Save

Prompts

Set values

Languages

English (United States)

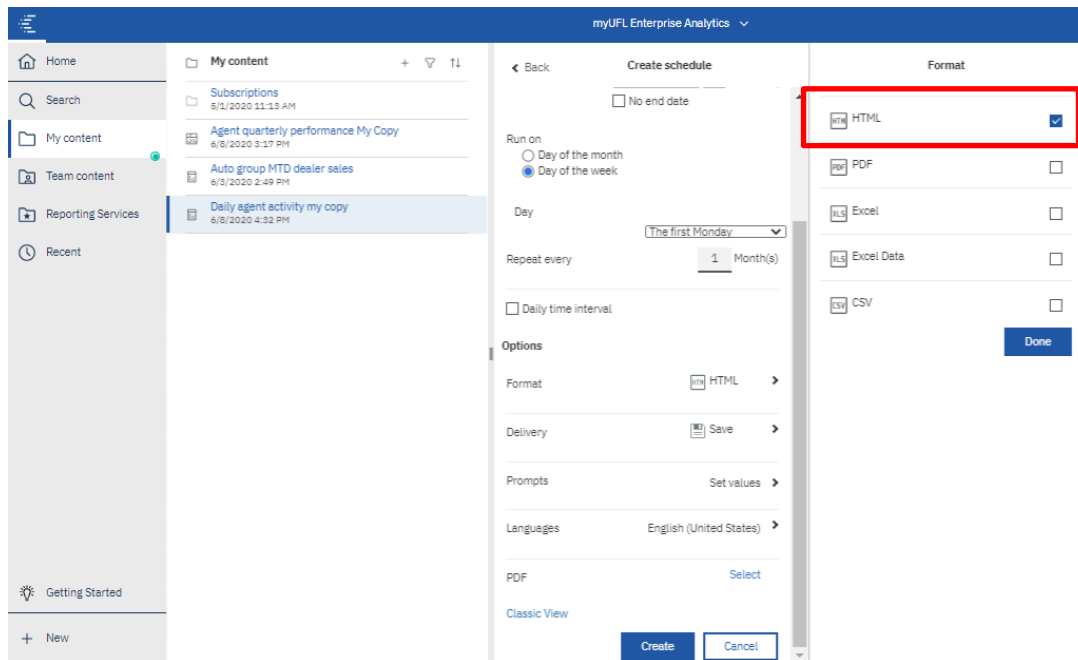
PDF

Select

Classic View

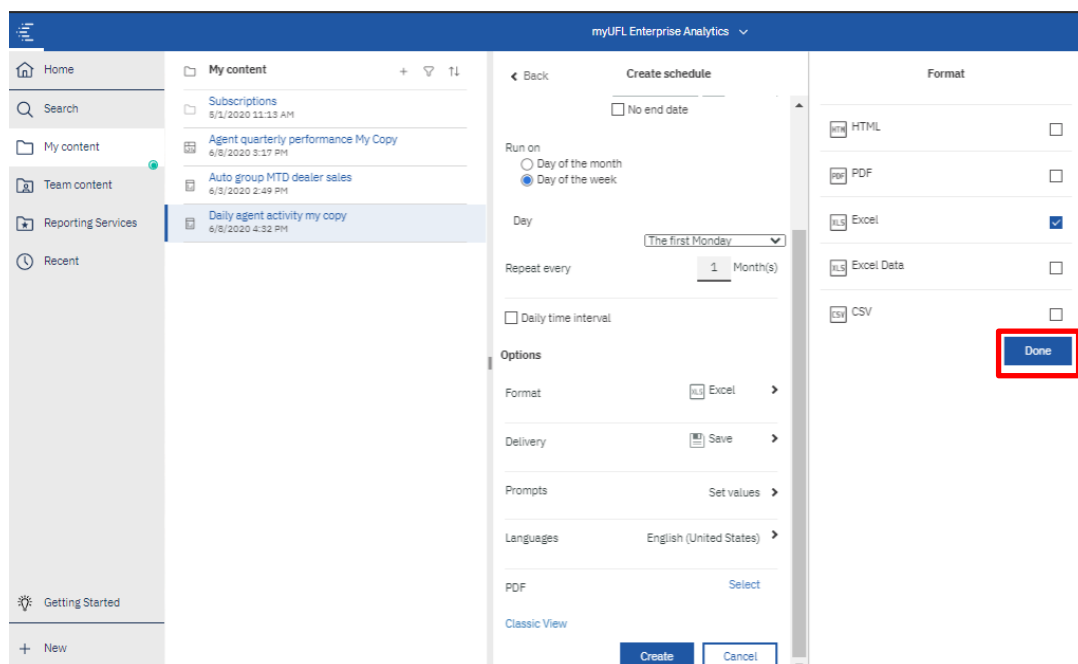
Create Cancel

14. Check the box next to **format type** you would like to receive.



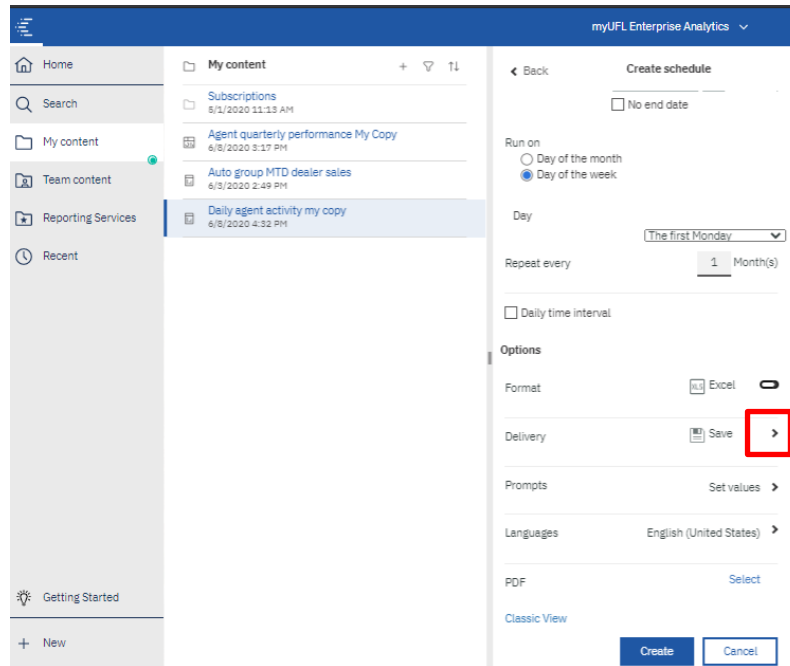
The screenshot shows the 'myUFL Enterprise Analytics' interface. On the left is a navigation menu with 'Home', 'Search', 'My content', 'Team content', 'Reporting Services', and 'Recent'. The 'My content' section is expanded, showing a list of items including 'Subscriptions', 'Agent quarterly performance My Copy', 'Auto group MTD dealer sales', and 'Daily agent activity my copy'. The main area is titled 'Create schedule' and includes options for 'Run on' (Day of the month or Day of the week), 'Day' (The first Monday), 'Repeat every' (1 Month(s)), and 'Daily time interval'. Below these are 'Options' for Format (HTML), Delivery (Save), Prompts (Set values), Languages (English (United States)), and PDF (Select). On the right, the 'Format' section is highlighted with a red box, showing a list of format types: HTML (checked), PDF, Excel, Excel Data, and CSV. A 'Done' button is at the bottom right of the 'Format' section.

15. Click **Done**.

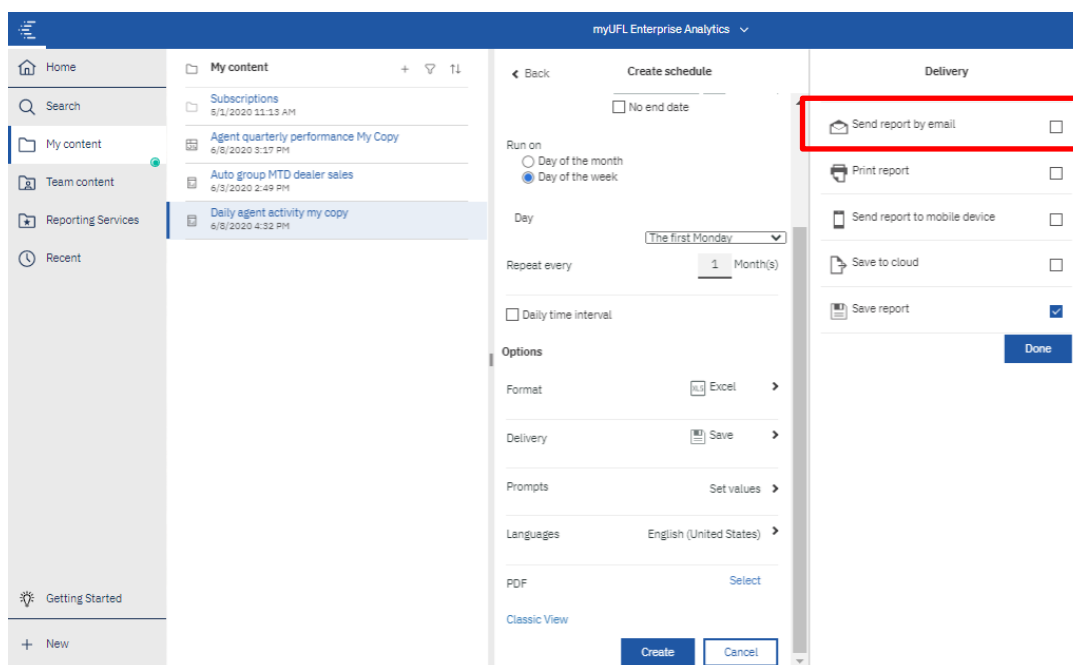


This screenshot is similar to the previous one, but the 'Excel' option in the 'Format' section is now selected with a checked checkbox. The 'HTML' option is now unchecked. The 'Done' button at the bottom right of the 'Format' section is highlighted with a red box, indicating it should be clicked to complete the setup.

16. Use the Delivery section to select the how you would like to receive the report in. Click the **arrow icon** next to delivery.



17. To receive your report via email, click box the next to **Send report by email**.



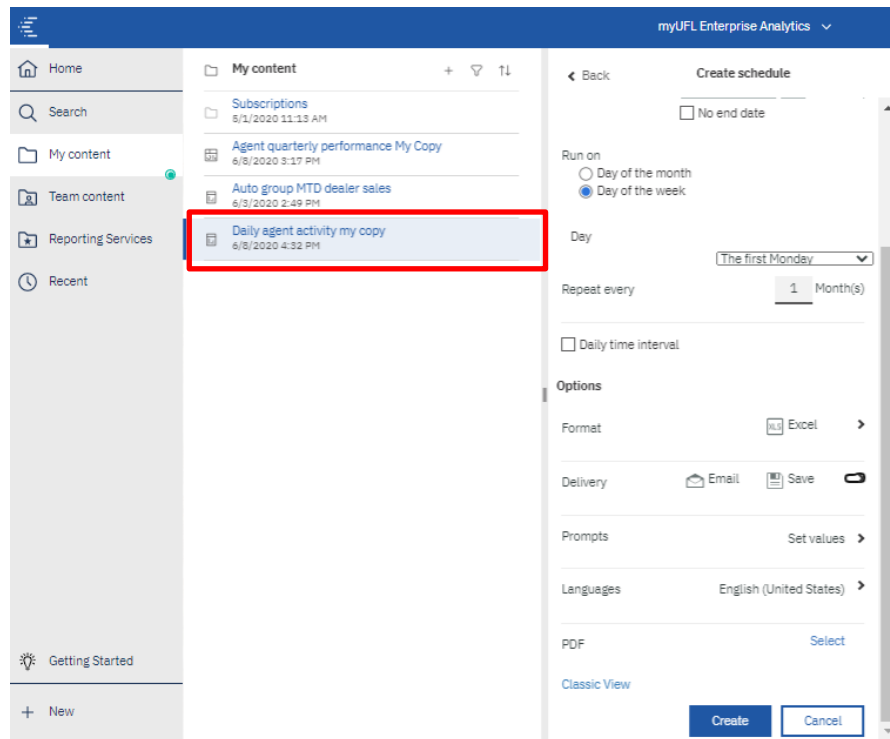
18. Enter the recipient's **email** address.

The screenshot shows the 'myUFL Enterprise Analytics' interface. On the left is a navigation menu with 'Home', 'Search', 'My content', 'Team content', 'Reporting Services', and 'Recent'. The 'My content' section is expanded, showing 'Subscriptions' and a list of reports including 'Agent quarterly performance My Copy', 'Auto group MTD dealer sales', and 'Daily agent activity my copy'. The 'Daily agent activity my copy' report is selected. The main area is titled 'Create schedule' and has a 'Back' button. It includes options for 'Run on' (Day of the month or Day of the week), 'Repeat every' (1 Month(s)), and 'Options' (Format: Excel, Delivery: Email, Prompts: Set values, Languages: English (United States), PDF: Select). The 'Delivery' tab is active, showing 'Send report by email' (checked), 'Attach the report' (unchecked), and a red box around the 'To:' field. Below this is the 'Subject' field with the text 'A new version of Daily agent activity my copy', and 'cc:' and 'bcc:' fields. At the bottom are 'Create' and 'Cancel' buttons.

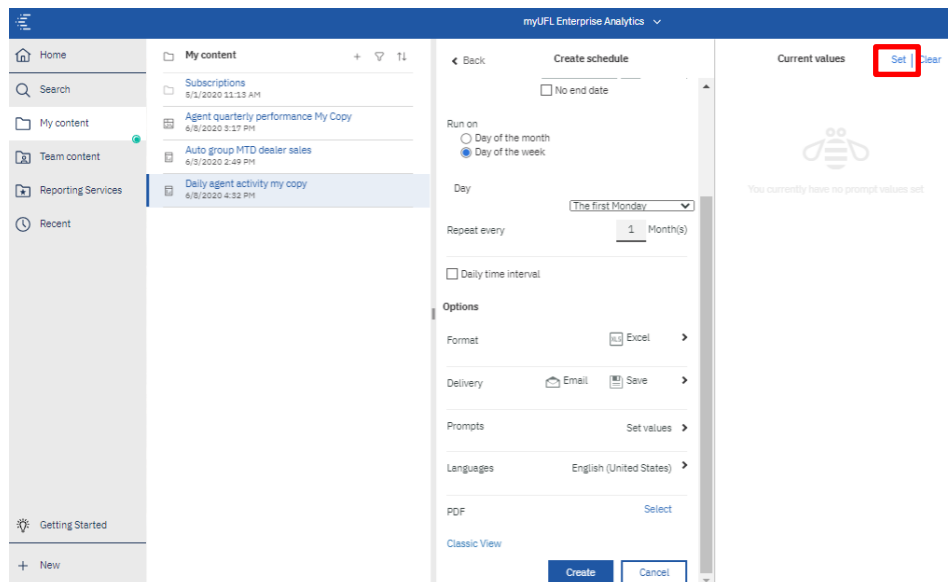
19. **A best practice is to send the report as a link** rather than as an attachment to ensure that the recipient has permissions to view the data. The recipient will have to log into Enterprise Analytics. Gatorlink will authenticate their permissions.

This screenshot shows the same 'myUFL Enterprise Analytics' interface as the previous one, but with the 'Include a link to the report' checkbox checked and highlighted with a red box. The 'To:' field is no longer highlighted. The 'Subject' field and other options remain the same. The 'Done' button is now visible at the bottom right of the 'Delivery' panel.

20. If you have prompts in the report, click **Set values** to set the prompts for the recipient.



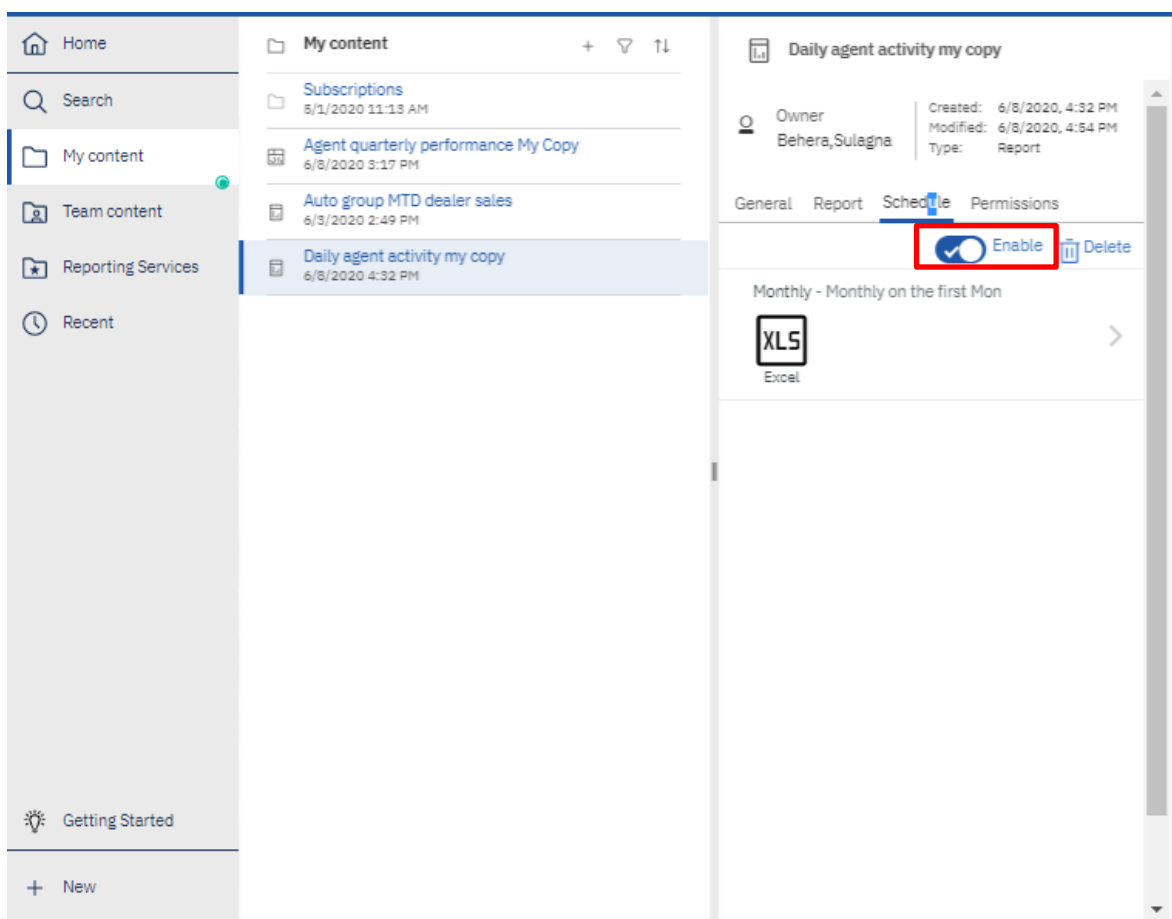
21. Click **Set**.



22. Click **Create**.



23. The schedule confirmation message displays. Make sure that **Schedule** is set to enable.



ADDITIONAL HELP

Technical issues, contact the UF Computing Help Desk
352-392-HELP

Policies and Directives, contact the University of Florida Reporting Services
reporting-services@ufl.edu