

# Enterprise Reporting

## My Reports

### Features, Functions and Searches

The "My Reports" menu allows you to download, add, remove and reorder your most frequently accessed monthly reports. These features only apply to the reports on the Enterprise Reporting menu (New Department Reports, Fund Reports, Sponsored Programs Reports, Residual/Overhead Reports and Construction Project Reports). To have the "My Reports" menu appear on your menu, you must have the security role of UF\_ER\_USER.

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## Getting Started

- ▶ Log in to myUFL, using your GatorLink username and password (<http://my.ufl.edu>)
- ▶ Select "Enterprise Reporting" from your myUFL menu
- ▶ Select "My Reports"

Before adding reports to your menu, the message will read "No Reports Saved Yet." The next steps describe how to add, remove and manage your reports.

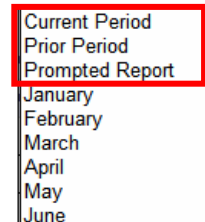
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## My Reports Toolbar

- ▶ The following features appear on the My Reports toolbar



- A. Create Group – Create groups and move or copy reports and put them in the group to manage your commonly used report
- B. Copy – Select a report or budgetary cost center, click the copy button, then paste the items into a group you've made
- C. Cut - Select a report or budgetary cost center, click the cut button to remove the item from that group, and then paste the items into a group
- D. Paste – Once you have copied or cut a report or group, use the paste button to put the item into another group
- E. Delete – Once you have selected a report or group, use the delete button to remove the item from your My Reports
- F. Expand All – Use the Expand All option to view all of the groups and reports in your My Reports
- G. Collapse All – Use the Collapse All to close the groups and only view them at the highest level
- H. Select All – Select everything in your My Reports
- I. Unselect All – Deselect everything in your My Reports
- J. Move and Indent – Move or indent (nest) your reports or cost centers by selecting an item and clicking the arrow for the direction in which you want them to move
- K. Select Period – Select the month for the report you want to view. Other options include:
  - a. Current Period – View the report(s) for the current period
  - b. Prior Period – View the report(s) for the prior period
  - c. Prompted Reports – Select this option, then the report type (PDF or Excel) and be redirected to the prompt page for that report
- L. Select Year – If you select a month in the first drop down menu, you must select the year also



# Add Reports to your “My Reports” Folder

- ▶ Navigate to the appropriate Budgetary Cost Center

New Department Reports > 69000000 BRIDGES-ERP

## 69010000 BR-BRIDGES-GENERAL ADMIN

To open a report, click the icon that corresponds with the format you prefer (PDF or Excel respectively). To add a report you use frequently to your My Reports page, click the Add to My Reports icon beside the report you would like to add. [Help](#)

**Delivered Reports (Currently Selected Period: June 2006)**

Period: June 2006

Appropriations Summary			
Cash Summary			
KK to GL Summary Comparison			
Open Encumbrance Summary			
Payroll Cost Distribution Run Date Detail			
Projected Payroll Cost Distribution			
Transaction Detail			

[View My Reports Page](#)

- ▶ Click the green “plus” icon () to add reports to your “My Reports”
  - ▶ Continue to add reports as needed

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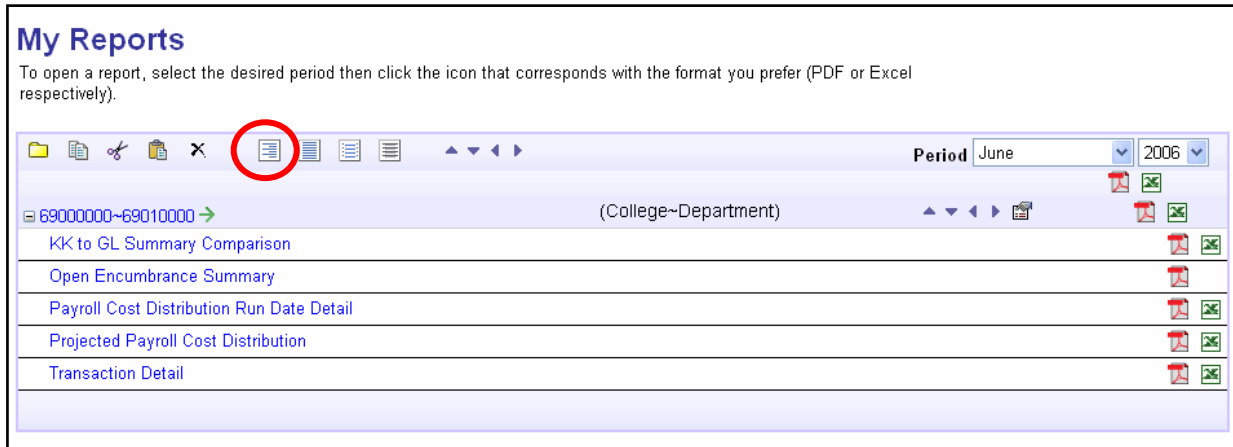
- ▶ Click the green “plus” icon at the very top to add all reports for that Budgetary Cost Center to your “My Reports”

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# Expand and Collapse your “My Reports” Folder

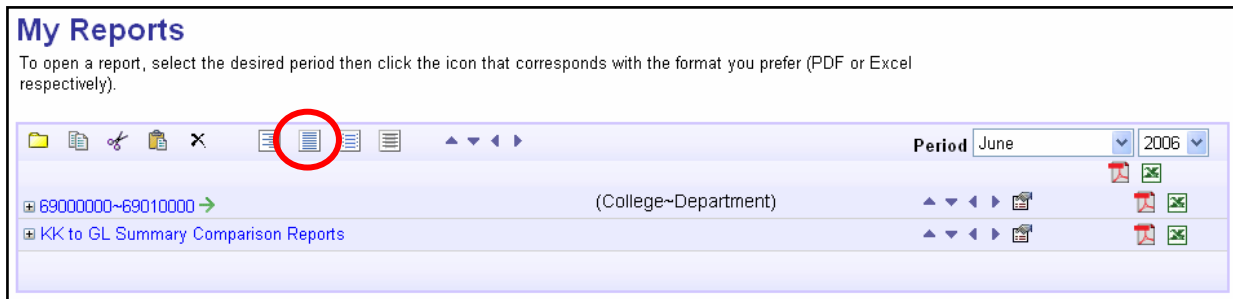
## Expand your “My Reports” Menu

- ▶ Click the “Expand All” button to view all reports on your “My Reports” menu
  - ▶ ALTERNATE NAVIGATION: Click the + button at the left of the menu to expand one Budgetary Cost Center at a time



## Collapse your “My Reports” Menu

- ▶ Click the “Collapse All” button to collapse your “My Reports” menu
  - ▶ ALTERNATE NAVIGATION: Click the – button at the left of the menu to collapse one Budgetary Cost Center at a time



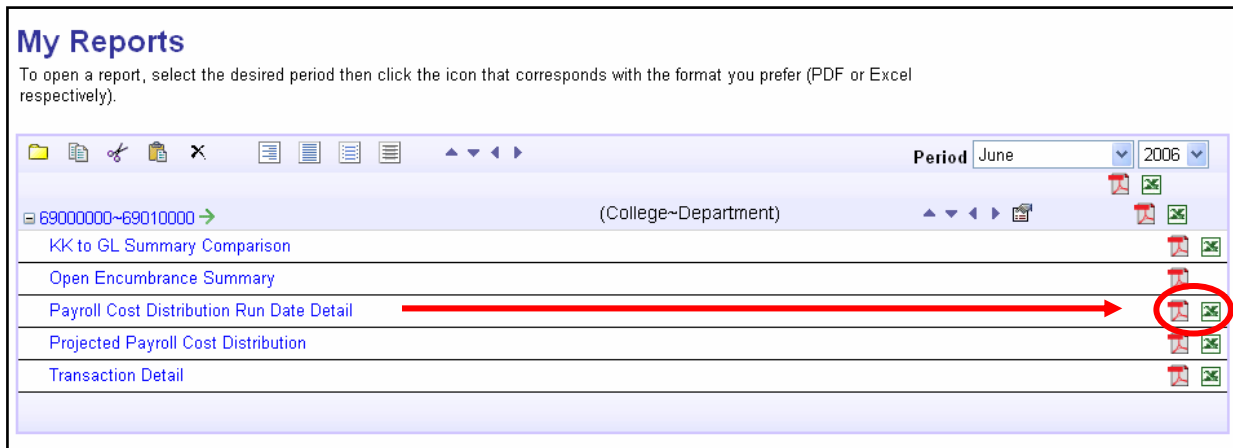
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## Download or View Reports from your “My Reports” Folder

- ▶ Navigate to your “My Reports” menu
- ▶ Select the appropriate month from the “Period” drop down menu
  - ▶ The “Period” represents the month the transaction was entered in myUFL

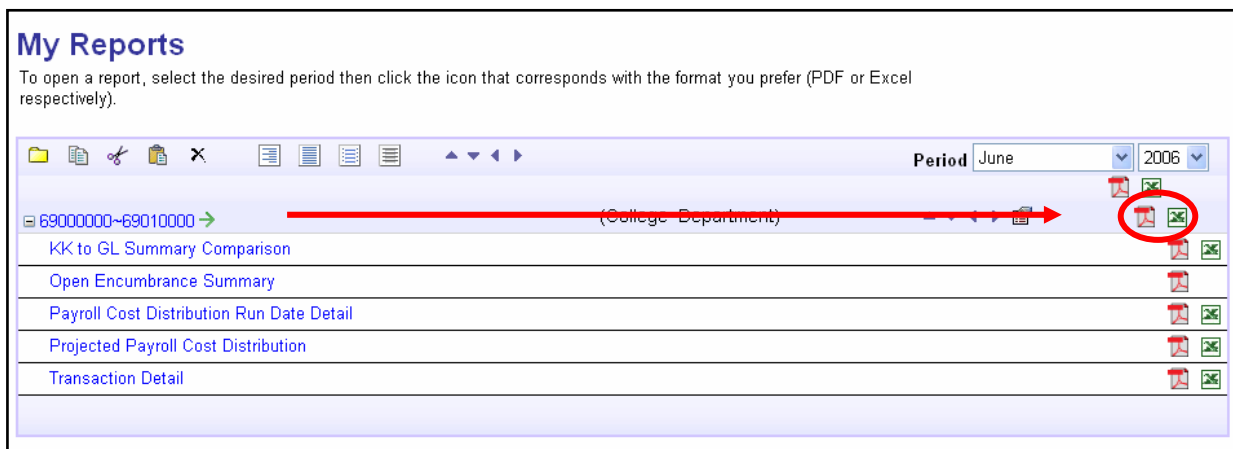
### ***Download or View a Single Report***

- ▶ Click the PDF (📄) or Excel (📊) icon to the right of the desired report to download it
  - ▶ “Unavailable” will appear if there is no report



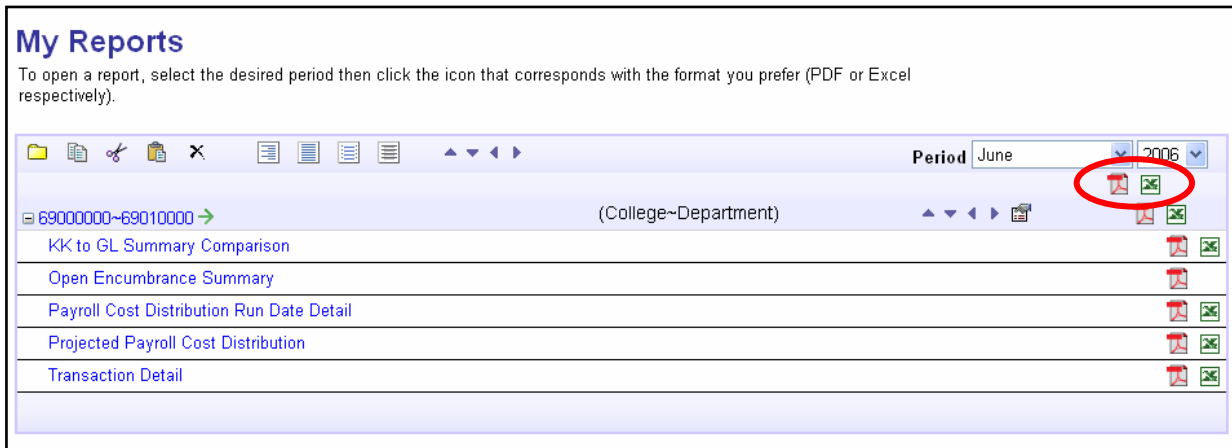
### ***Download or View a Bundle (Multiple Reports)***

- ▶ At the top of each group, there are additional PDF and EXCEL icons



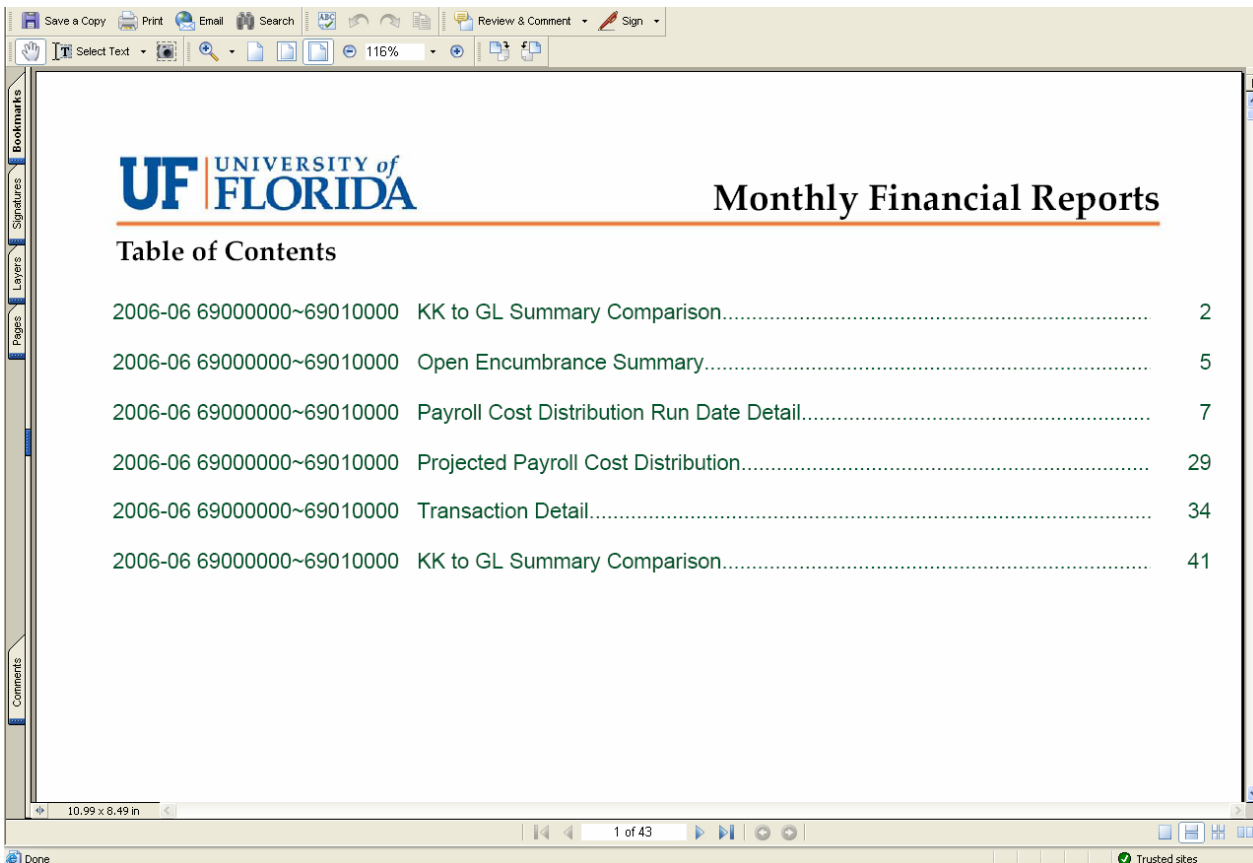
- ▶ These icons will generate a BUNDLE of all the reports in that group
- ▶ These BUNDLES can be viewed in:
  - ▶ PDF – Generated in a single PDF for all of those reports
  - ▶ EXCEL – Open the ZIP file to view all of the individual Excel files

- ▶ There are also BUNDLE icons available at the very top.
  - ▶ Selecting that PDF or Excel, will bundle ALL of the groups in your My Reports folder



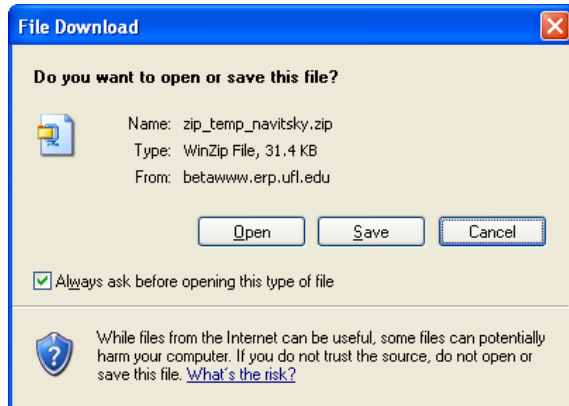
## View a PDF Bundle

- ▶ PDF Bundles are viewed in the Adobe PDF Reader
- ▶ Each item in the Table of Contents is a hyperlink to that PDF page.
  - The page numbers in the Table of Contents represents the page numbers in the PDF document. Not the page numbers on the specific reports
- ▶ Simply click on report you want to view and the reader will direct you to that page

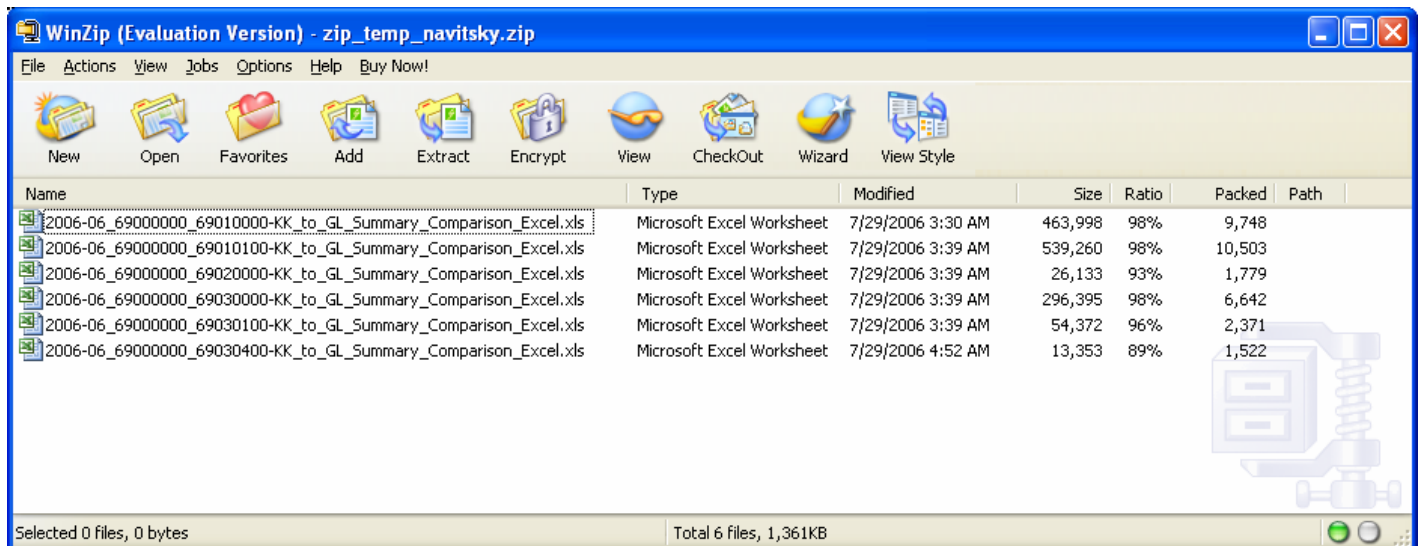


## View an Excel Bundle

- ▶ Excel Bundles are generated in a ZIP file
- ▶ When prompted, **Open** the zip file



- ▶ The Excel reports are in the folder
- ▶ Simply double click the file you want to view



- ▶ Excel will launch and your report will render

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## Select Items in your “My Reports” Folder

### *Select a Report*

- ▶ To select a report, click on the name of the report
  - ▶ Once selected, the report will be highlighted in blue
  - ▶ You may cut, copy, delete or move all the selected items at the same time
- ▶ To select multiple reports, hold down the CTRL key and click on each of the reports
- ▶ Release the CTRL key



### *Select a Group*

- ▶ To select a group, click on the name of the group
  - ▶ Once selected, the report will be highlighted in blue
  - ▶ You may cut, copy, delete or move all the selected items at the same time
- ▶ To select multiple groups, hold down the CTRL key and click on the group name
- ▶ Release the CTRL key



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## Move Items in your “My Reports” Folder

### *Move a Single Item*

- ▶ **Select** the item you want to move or copy
- ▶ Do one of the following:
  - ▶ To move the item, click **Cut**  on the toolbar
- ▶ Click the group where you want the item to appear
- ▶ Click **Paste**  on the toolbar

### *Move Items That Aren't Next to Each Other*



- ▶ Select the first item you want move or copy
- ▶ Hold down the CTRL key
- ▶ Select any additional items you want while continuing to hold CTRL
- ▶ Release the CTRL key
- ▶ Do one of the following:
  - ▶ To move the item, click **Cut**  on the toolbar
- ▶ Click the group where you want the item to appear
- ▶ Click **Paste**  on the toolbar





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## Copy Items in your “My Reports” Folder

### *Copy a Single Item*


- ▶ **Select** the item you want to move or copy
- ▶ Do one of the following:
  - ▶ To copy the item, click **Copy**  on the toolbar
- ▶ Click the group where you want the item to appear
- ▶ Click **Paste**  on the toolbar

### *Move or Copy Items That Aren't Next to Each Other*

- ▶ Select the first item you want to move or copy
- ▶ Hold down the CTRL key
- ▶ Select any additional items you want while continuing to hold CTRL
- ▶ Release the CTRL key
- ▶ Do one of the following:
  - ▶ To copy the item, click **Copy**  on the toolbar
- ▶ Click the group where you want the item to appear
- ▶ Click **Paste**  on the toolbar


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## Remove a Group from your “My Reports” Folder

- ▶ Select the Budgetary Cost Center by clicking on the text
- ▶ Click the delete icon  on the toolbar to remove the Budgetary Cost Center and the reports below it from your “My Reports” menu

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## Remove a Report from your “My Reports” Folder

- ▶ Select the report you want to remove by clicking on the text
- ▶ Click the delete icon  on the toolbar to remove that report from your “My Reports” menu

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## Reorder Groups on your “My Reports” Folder

- ▶ Click the up or down arrow buttons to move each Budgetary Cost Center
  - ▶ Reorder your menu with the menu expanded or collapsed

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## Search Options

### ***Sponsored Programs Search***

- ▶ Navigate to New Sponsored Program Reports
- ▶ Enter the Primary Investigator's (PI's) UFID number in the PI field or enter the PI's name in the Description field
- ▶ Click the Lookup button
  - ▶ The search results are limited to 300
  - ▶ If needed, use the operator drop down menu to focus your search results
- ▶ Click the UFID or name of the PI to populate the field
- ▶ Click the Search button

From the search results

- ▶ Select the Period you wish to review from the drop down list in the upper right hand corner
- ▶ If you are selecting a specific month, you will also need to specify the corresponding year
- ▶ To view a report, click the icon of the document format you prefer (PDF or Excel) to open the corresponding report
- ▶ To view or print a complete group, click the PDF or Excel icon at the higher level
- ▶ To view or print all reports in your My Reports folder, click the PDF or Excel icon at the top
- ▶ To add the report to your My Reports page, click the green Add to My Reports icon

### ***Report Search***

- ▶ Select **Report Search** from the Enterprise Reporting menu
- ▶ Enter the search criteria
  - ▶ There are several operators to choose from in the drop down menu
  - ▶ You can also use the lookup if you don't know the value to enter
- ▶ Select one or more of the report types
  - ▶ You can use the Select All feature if you want all reports available
- ▶ Click the Search button
- ▶ Your search results will appear

When searching, you are searching through the existing Monthly Financial Reconciliation Reports. You can only search with values that are used to "control" the Budgetary Cost Center. For example, using the table on the following page:

- ▶ If you are searching for data for fund 144, you can search using Dept ID
- ▶ If you are searching for data for fund 214, you can search using Dept ID and/or Project ID