

RUNNING AND SCHEDULING THE **DEPARTMENT TERMINATIONS AND TRANSFERS** REPORT

RUNNING THE REPORT

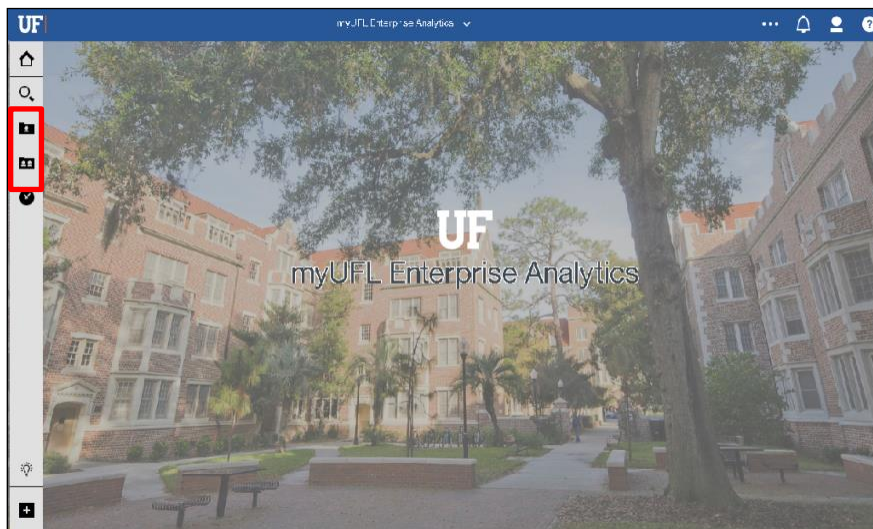
The following instructions will walk you through the processes of running a report, creating a report view, setting prompts and scheduling the report view for email delivery.

NAVIGATION

Login into myUFL and navigate to:

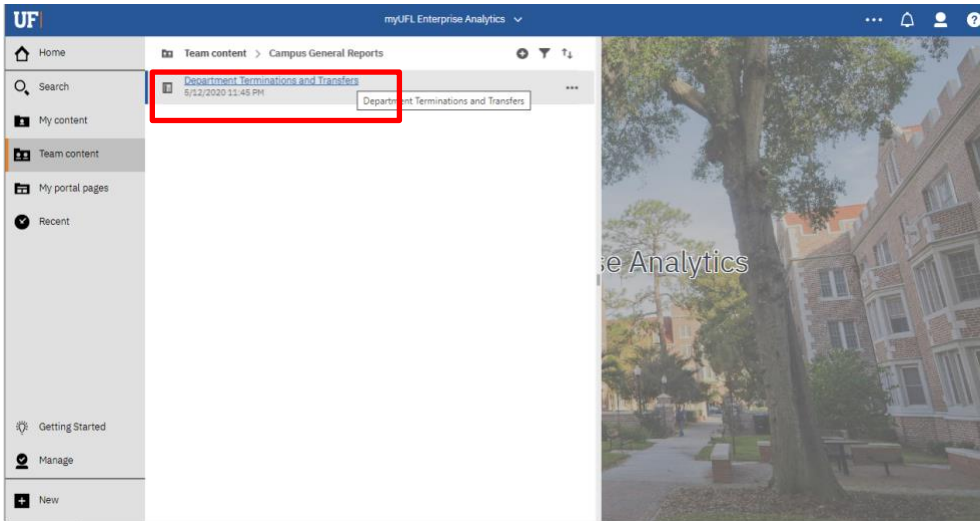
Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics

1. To open the report, click on the **Team Content folder**.
 - The Team Content folder is used for reports shared by you and other members of your team. The My Content folder is used for your personal reports.

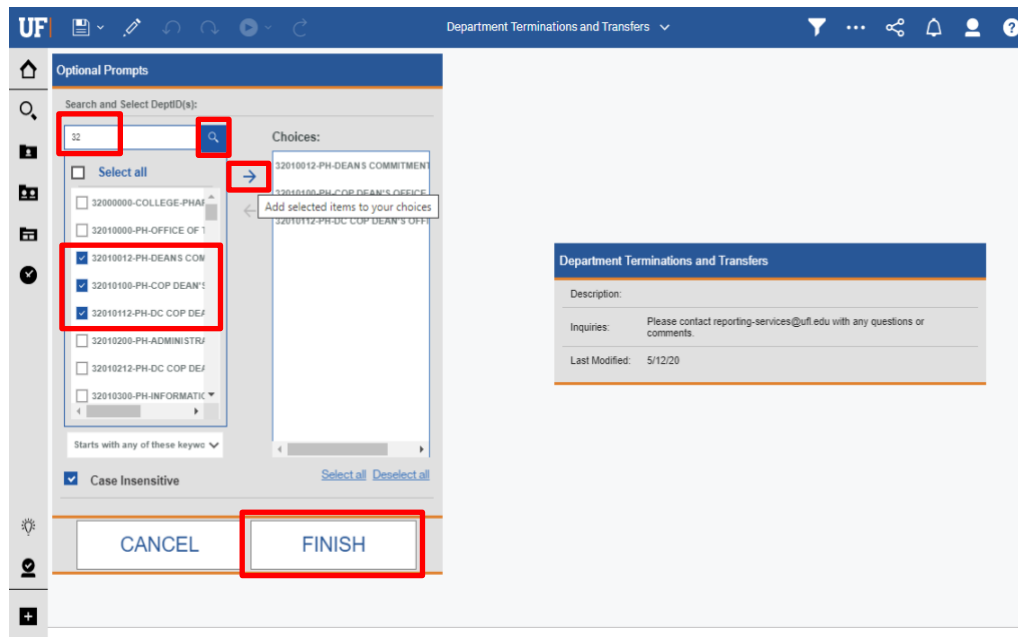


2. Navigation to the **Department Terminations and Transfers** is **Team Content > Campus General Reports**

3. To run the report, click the blue title of the report.



4. Select the **options** you would like to use to filter your report. You may search on DeptID and select individual departments to include or check the **Select All** check box then theclick the **Add selected items to your choices** arrow to have options added to the **Choices** box on the right. Click **Finish** to run the report.



- To search based on Department Name, change the **options** from **Starts with any of these keywords** to **Contains any of these keywords**. Enter your search criteria in the **Input keywords here** text box then click **search**. Add your choices to the **Choices** box. Click **Finish** to run the report.

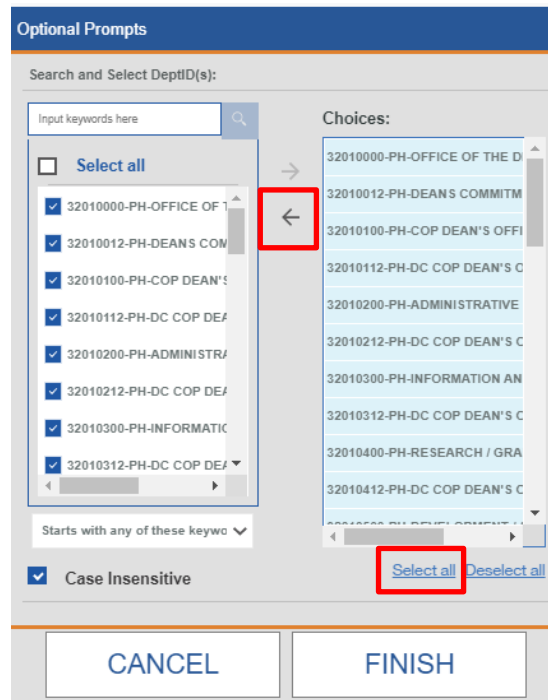
The screenshot shows the 'Optional Prompts' interface. At the top, there is a search box containing 'Pharmacy' and a search icon. Below the search box is a list of department names with checkboxes, including '08071700-SG-PHARMACY', '27071200-HA-PHARMACY', '28305000-VM-PHARMACY', '32000000-COLLEGE-PHAF', '32090000-PH-PHARMACY', '35040200-SH-PHARMACY', '35040201-SH-PHARMACY', and '95011110-D SO-SHANDS-U'. A dropdown menu is open below the list, showing four options: 'Starts with any of these keywords', 'Starts with the first keyword and contains all of the remaining keywords', 'Contains any of these keywords', and 'Contains all of these keywords'. The 'Contains any of these keywords' option is highlighted with a red box. To the right of the list is a 'Choices' box containing three department IDs: '32010012-PH-DEANS COMMITMENT', '32010100-PH-COP DEAN'S OFFICE', and '32010112-PH-DC COP DEAN'S OFFI'. At the bottom right, there is a 'Deselect all' button.

- The report loads filtered by the options you selected.

- To run the report with different Prompt criteria, click the play icon.



- The prompt page will reload with your previous search criteria. To remove the selects, click Select All beneath the Choices box, Then click the Remove from the list of selections arrow. Add new search criteria by repeating steps 1 – 5.

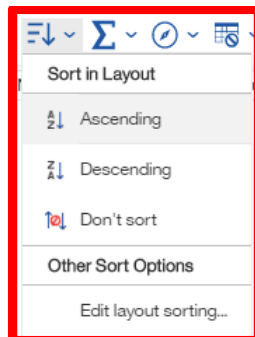


- You can interact with your data and refine your results by clicking on one of the column headers. Filtering, Sorting, and Grouping are frequently used options.

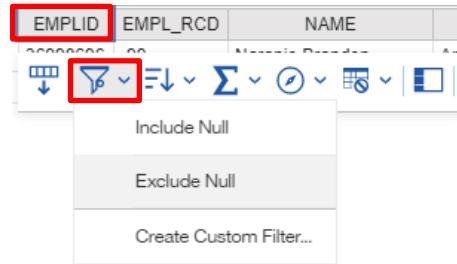
- Sorting Data



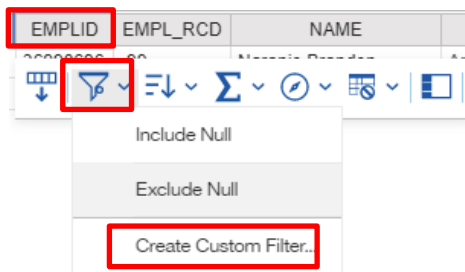
- Select your **sort options**: Ascending, Descending or Don't Sort (remove existing sort)



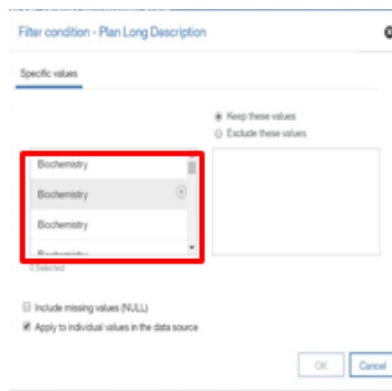
12. Filtering follows a similar process. To filter, click on the **column header**. Then, click the **filter icon**.



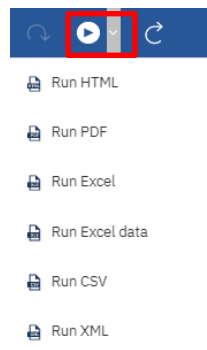
13. Click **Create Custom Filter**.



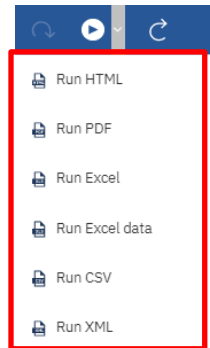
14. Select the **options** you would like to filter by. Then, click **OK**.



15. To export a report, click the **arrow** icon next to the **play** button.



16. Select the **output type** you would like for the exported report.



17. Select any **prompts** you want applied to the exported report. Refer to steps 1 - 5 if needed. Then, click **Next**.
18. The exported report opens in the requested format.

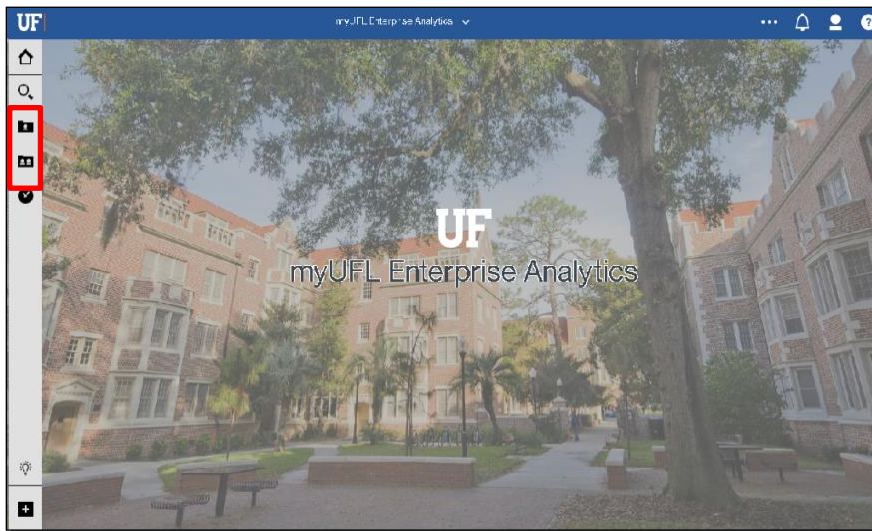
SCHEDULING THE REPORT FOR EMAIL DELIVERY

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

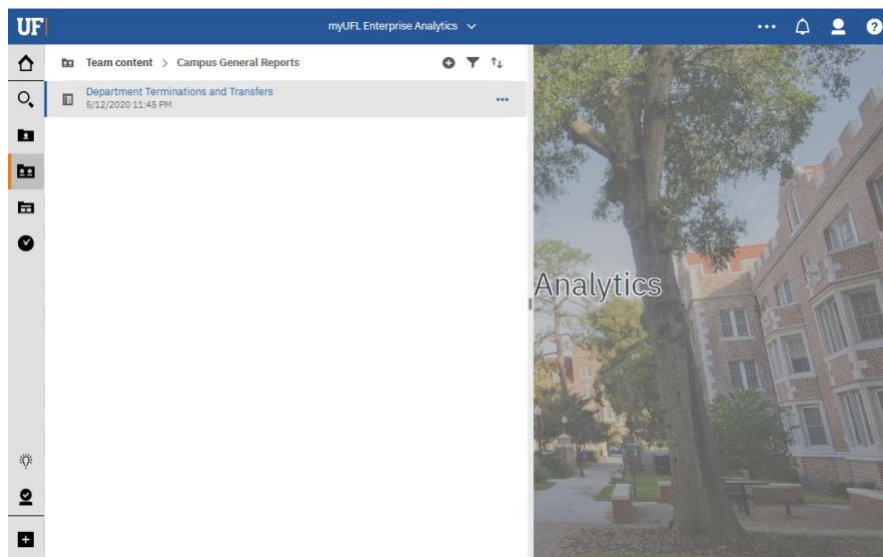
NAVIGATION

Login into myUFL and navigate to: **Nav Bar > Main Menu > Enterprise Analytics > Access Enterprise Analytics**

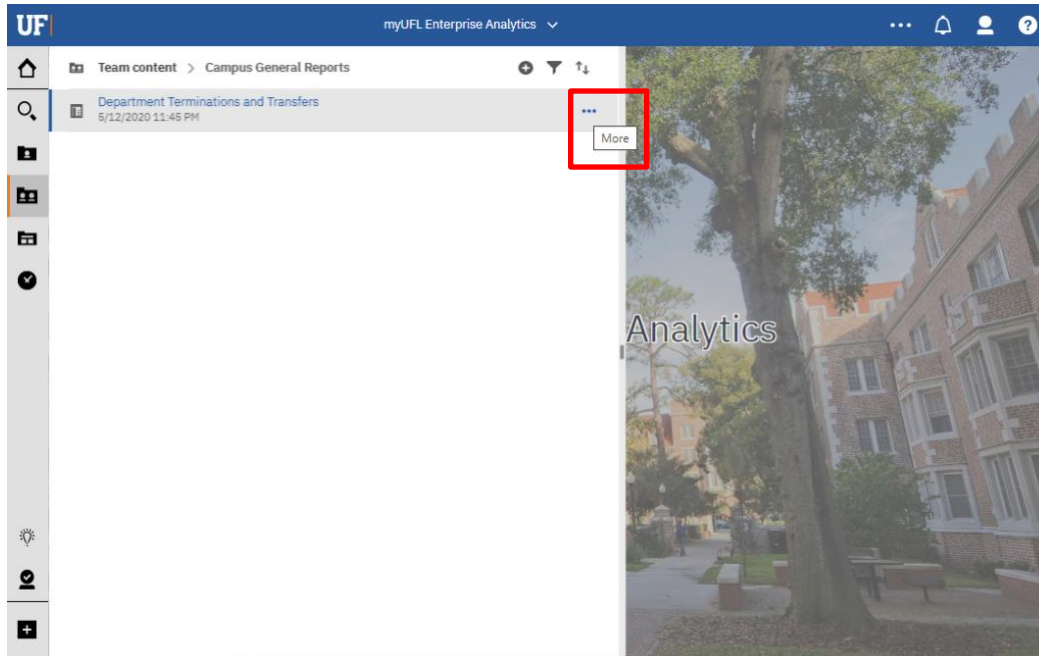
1. To open the report, click on the **Team Content folder**.
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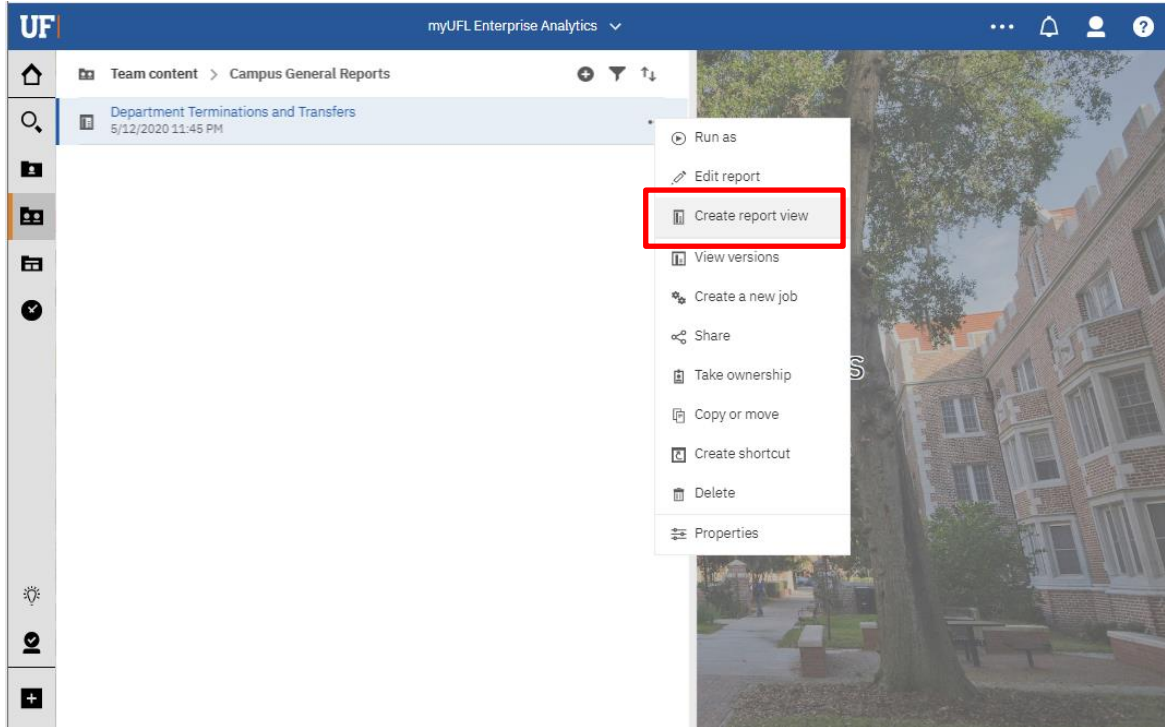
2. Navigation to the **Department Terminations and Transfers** is **Team Content > Campus General Reports**



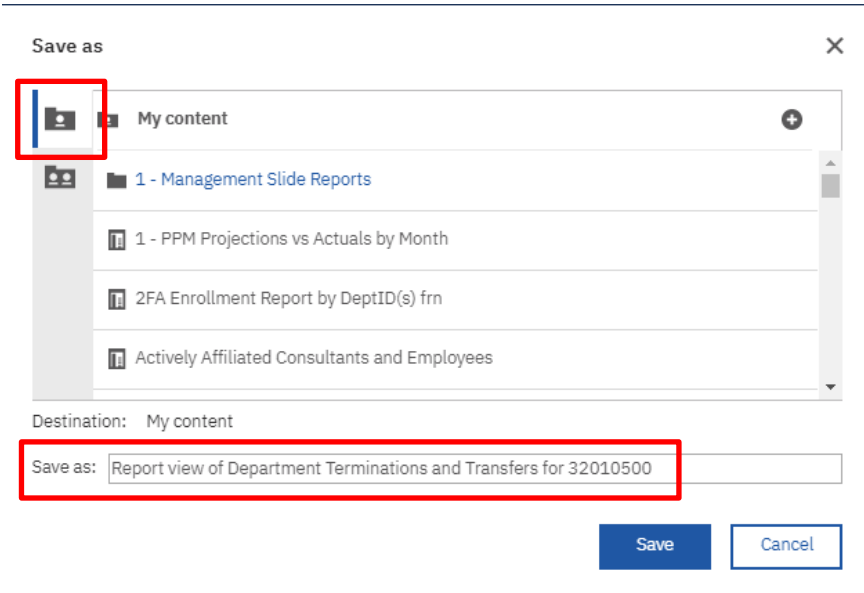
3. Click the **more** options (ellipses).



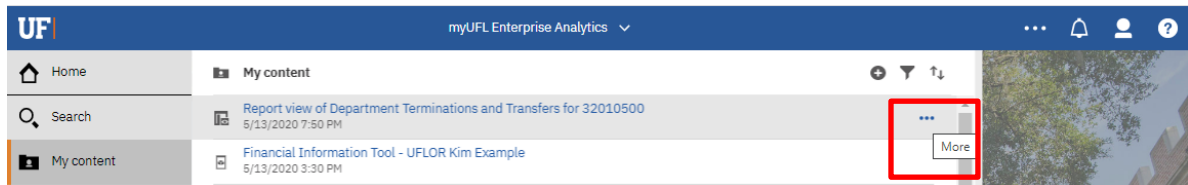
4. Select **Create report view**.



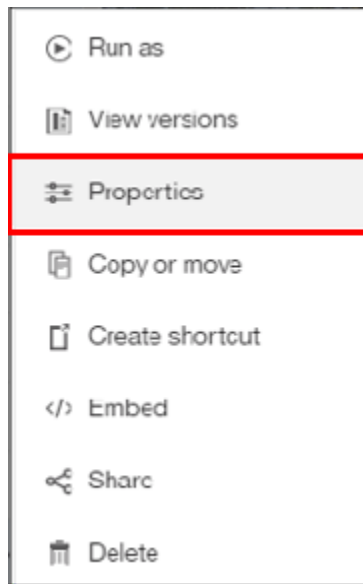
5. Name the report as desired and save to your **My Content** folder:



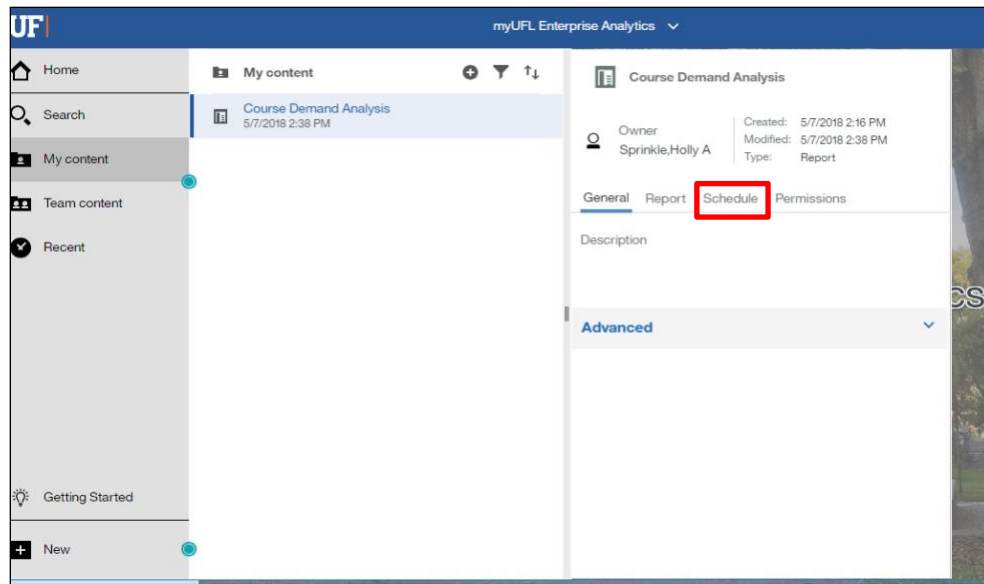
6. Navigate to the saved report view and click the **more** icon.



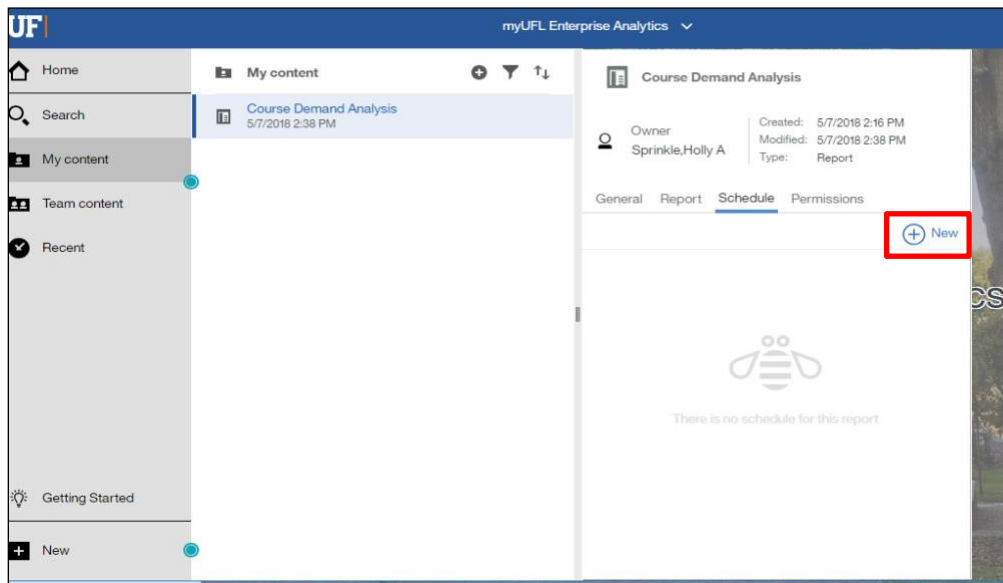
7. Click **Properties**.



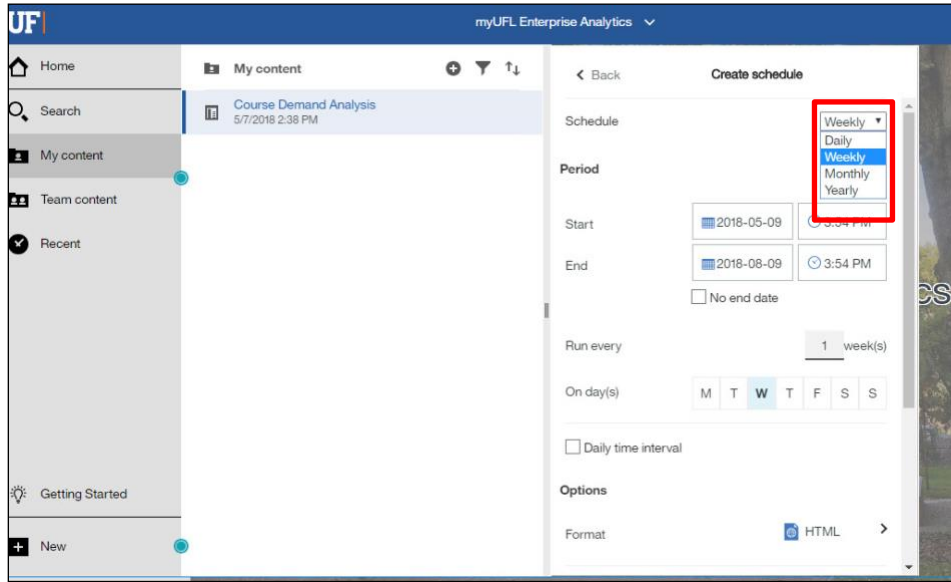
8. Click **Schedule**.



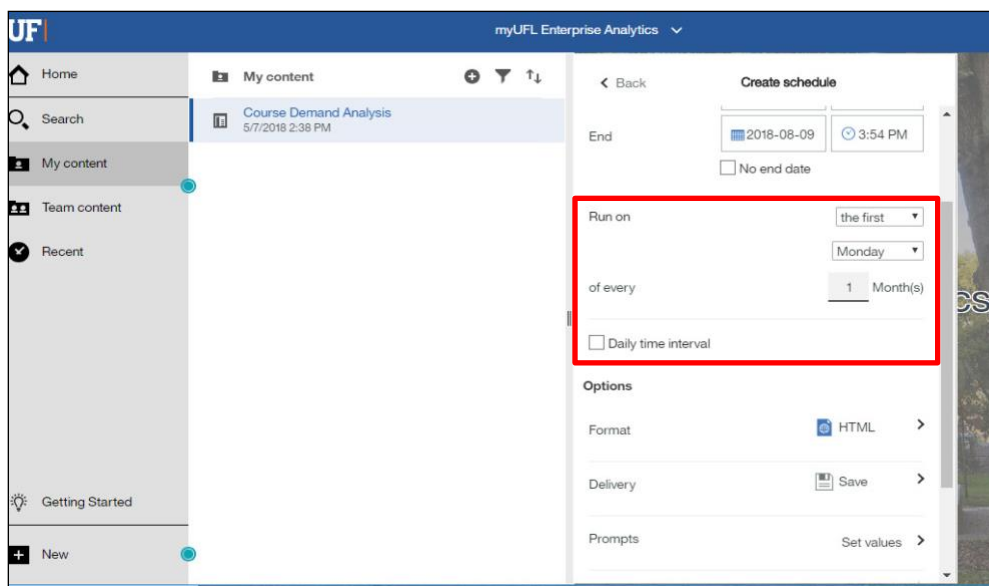
9. Click the **New** icon.



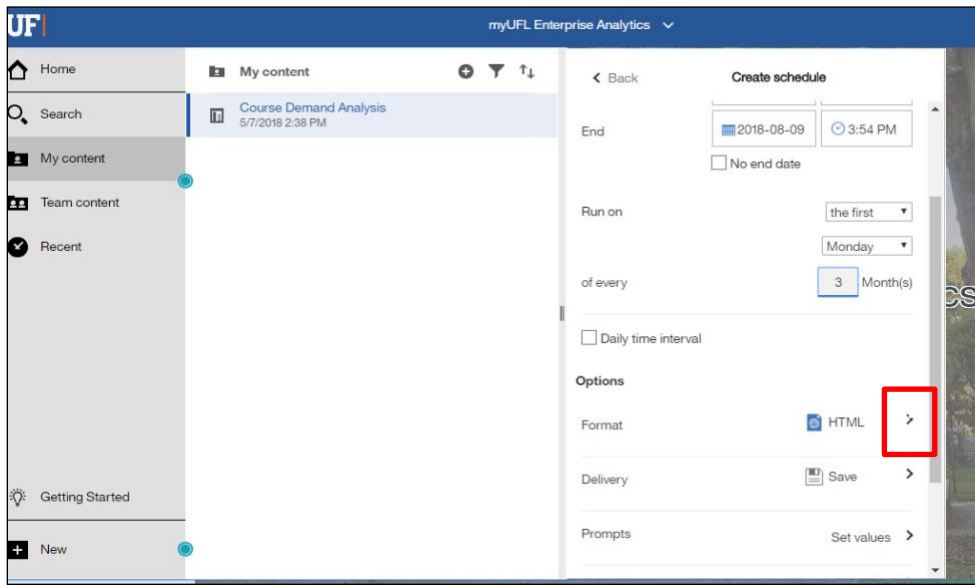
10. Select how frequently you would like to schedule the report.



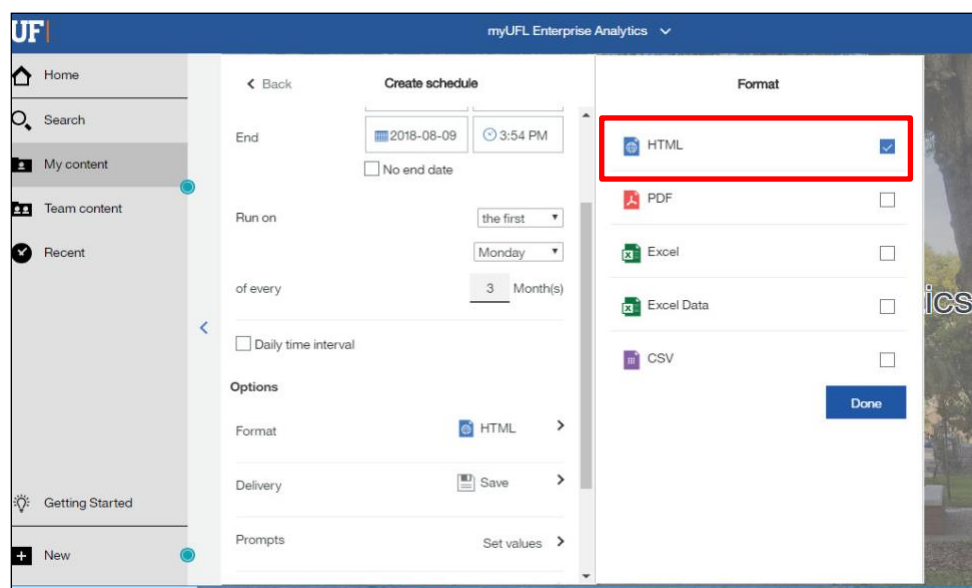
11. Select when and how often you'd like to receive the report.



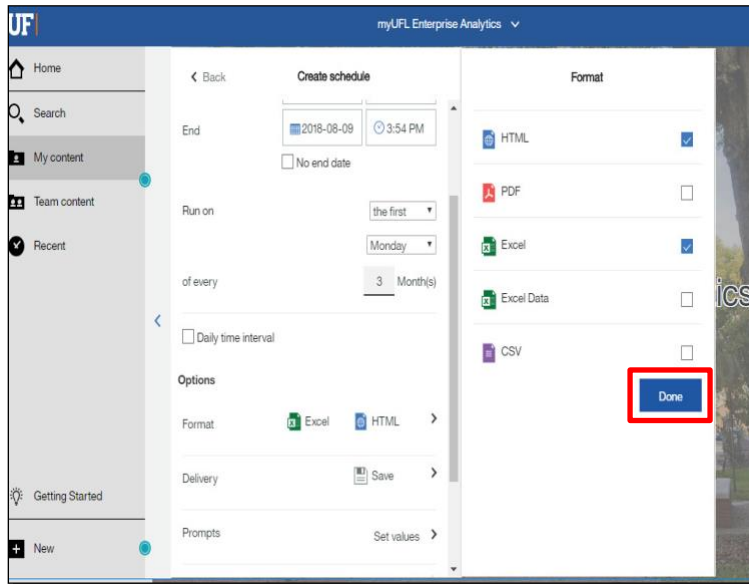
12. Use the format section to select the type of format you would like to receive the report in. Click the **arrow icon** next to format type.



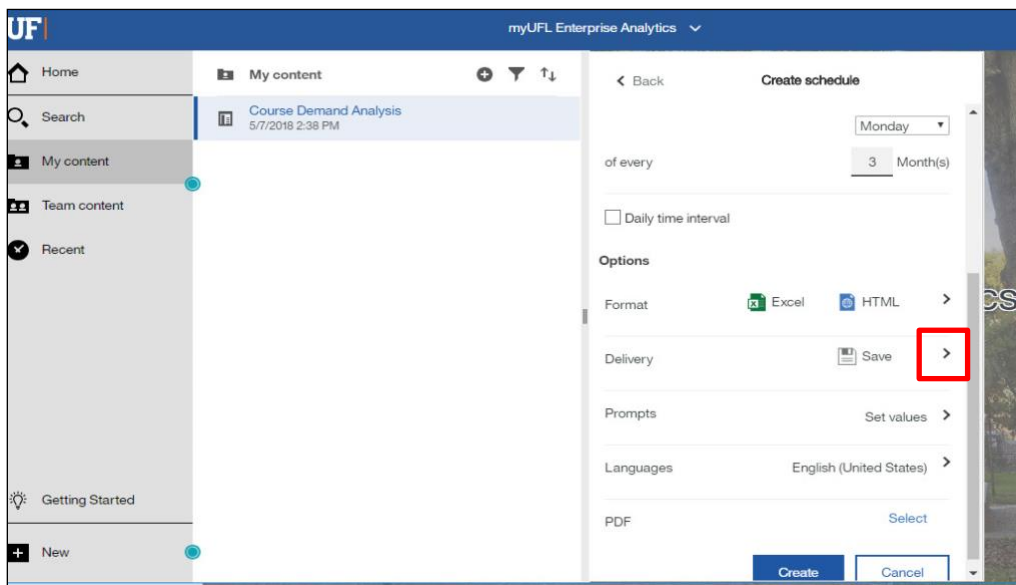
13. Check the box next to **format type** you would like to receive.



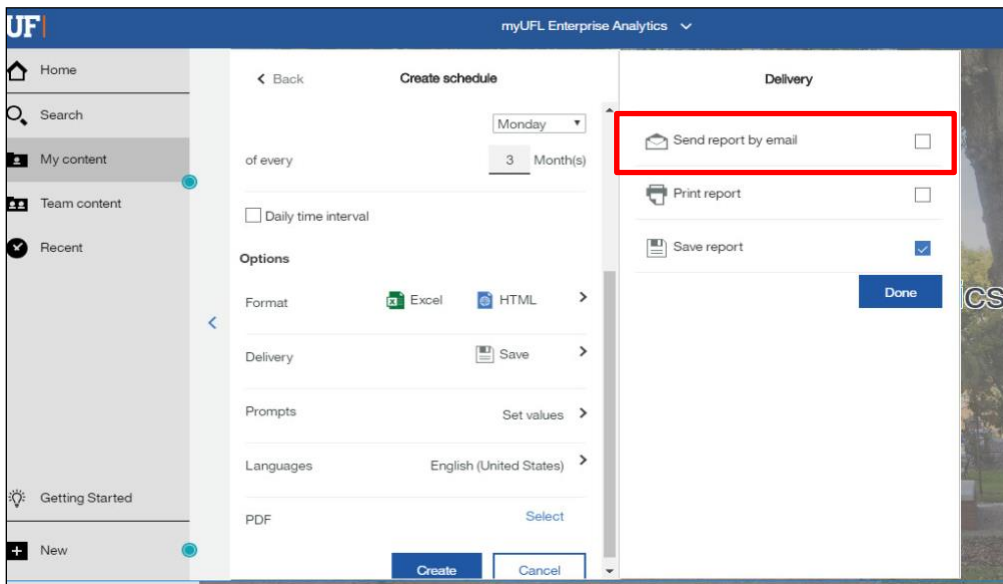
14. Click **Done**.



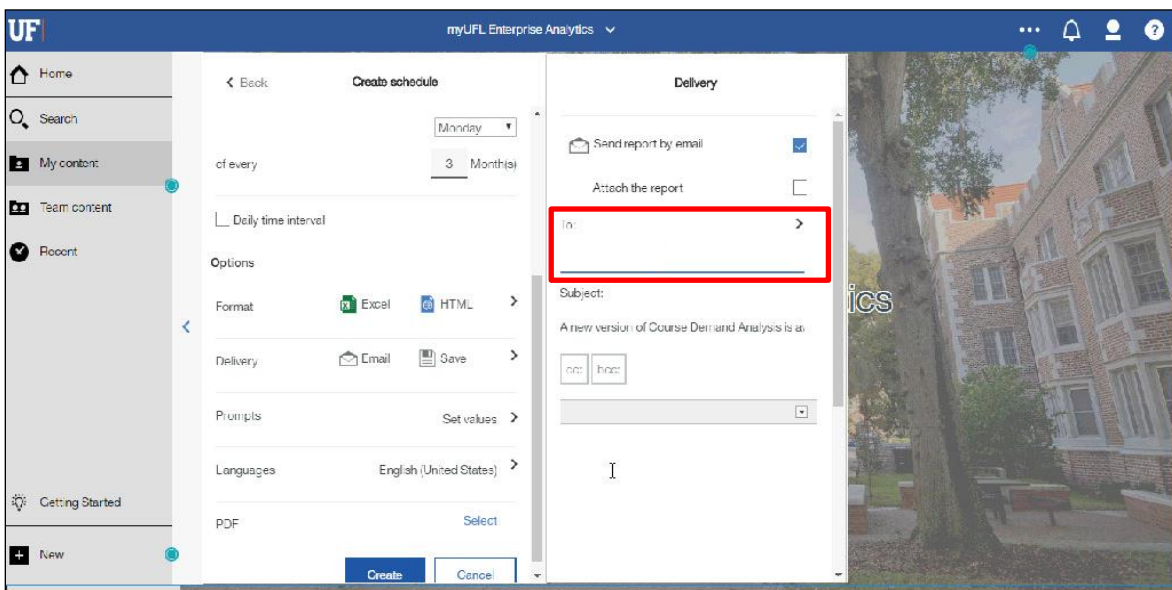
15. Use the Delivery section to select the how you would like to receive the report in. Click the **arrow icon** next to delivery.



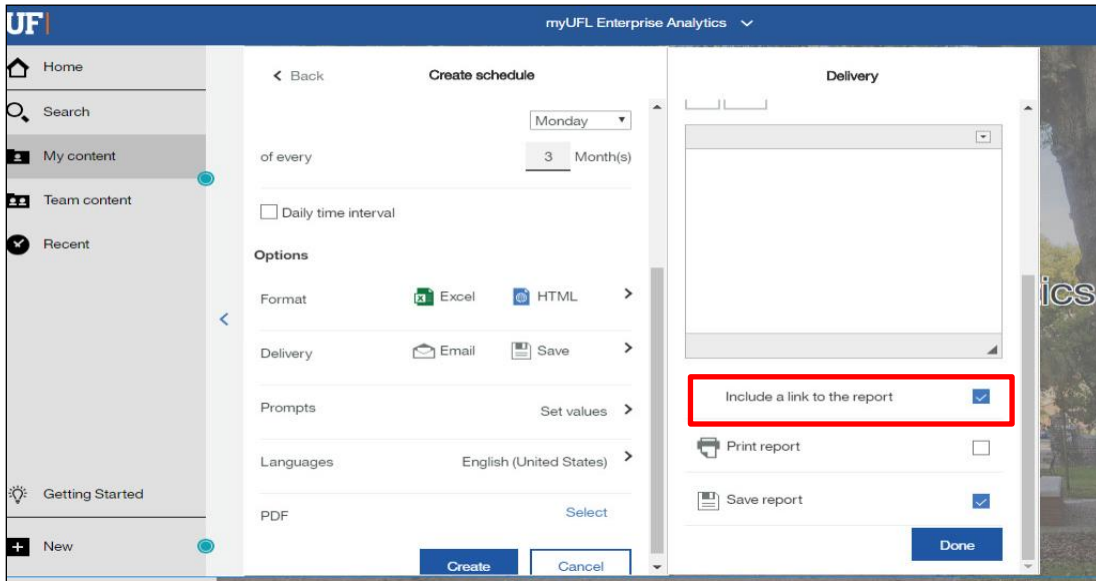
16. To receive your report via email, click box the next to **Send report by email**.



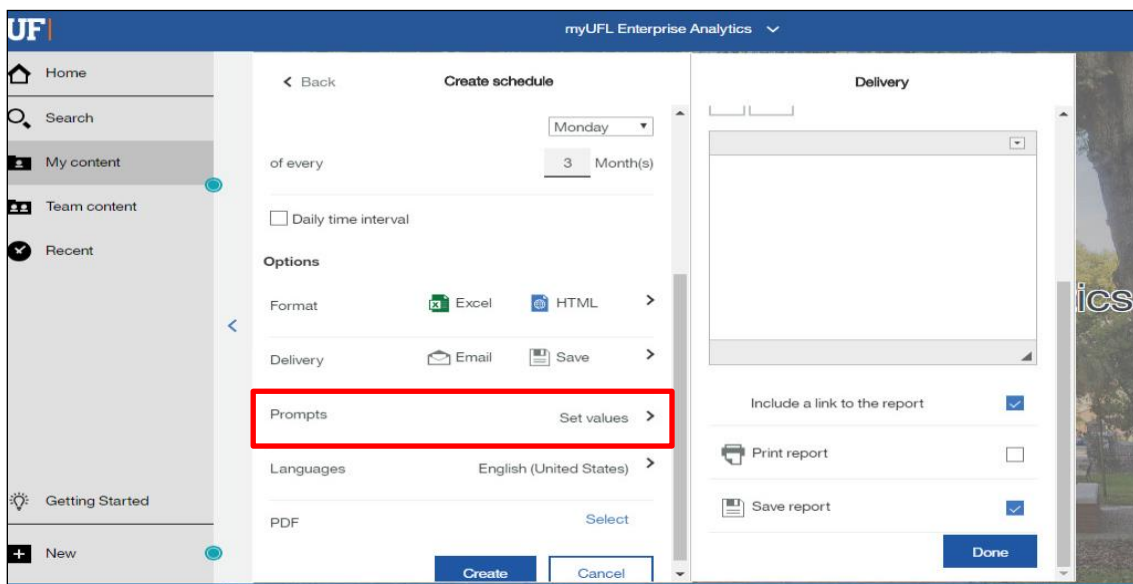
17. Enter the recipient's **email address**.



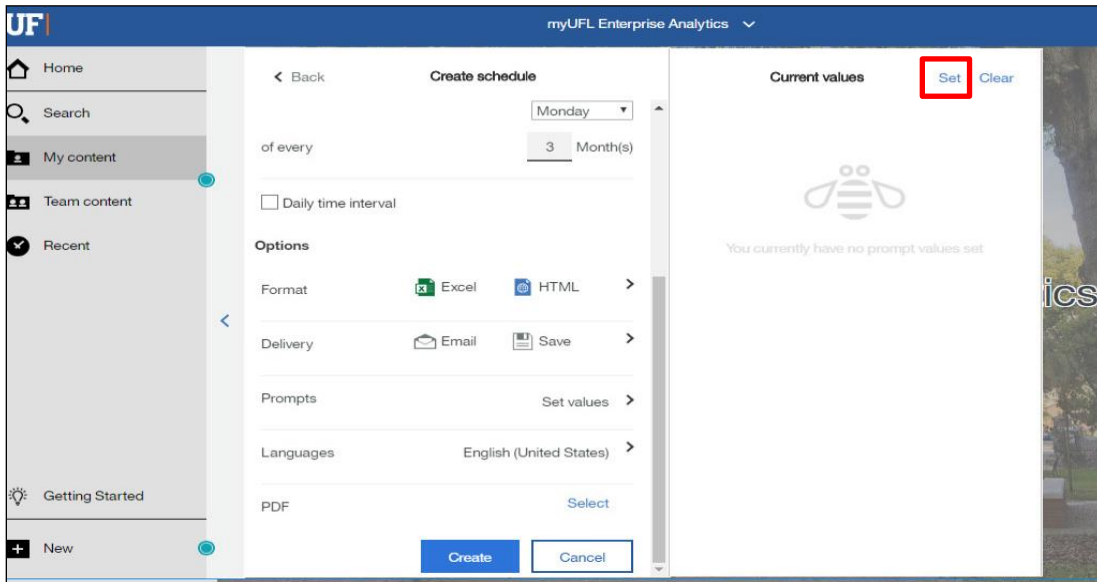
18. A best practice is to send the report as a link rather than as an attachment to ensure that the recipient has permissions to view the data. The recipient will have to log into Enterprise Analytics. Gatorlink will authenticate their permissions.



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



20. Click **Set**.



21. Click **Create**.



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

