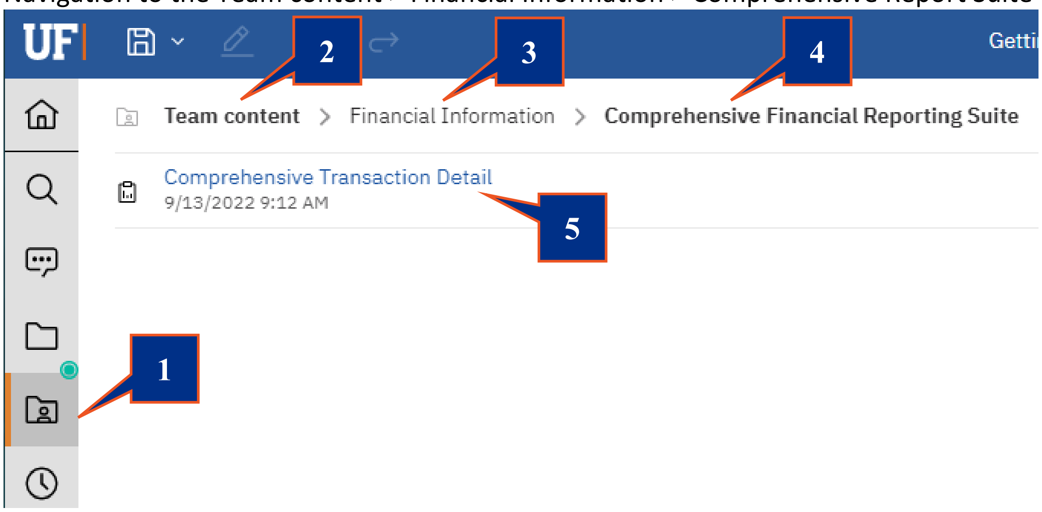
Outline for Running Comprehensive Transaction Detail Reports

Navigation

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

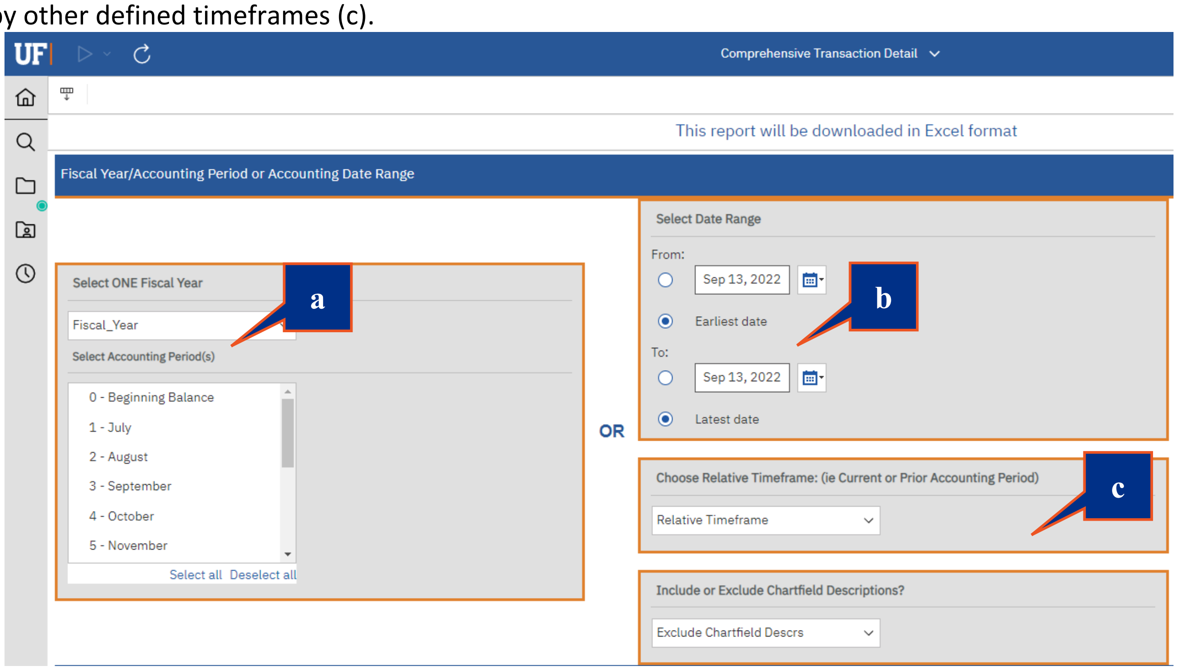
To open the report, click on the Team Content folder.

- Navigation to the Team content > Financial Information > Comprehensive Report Suite

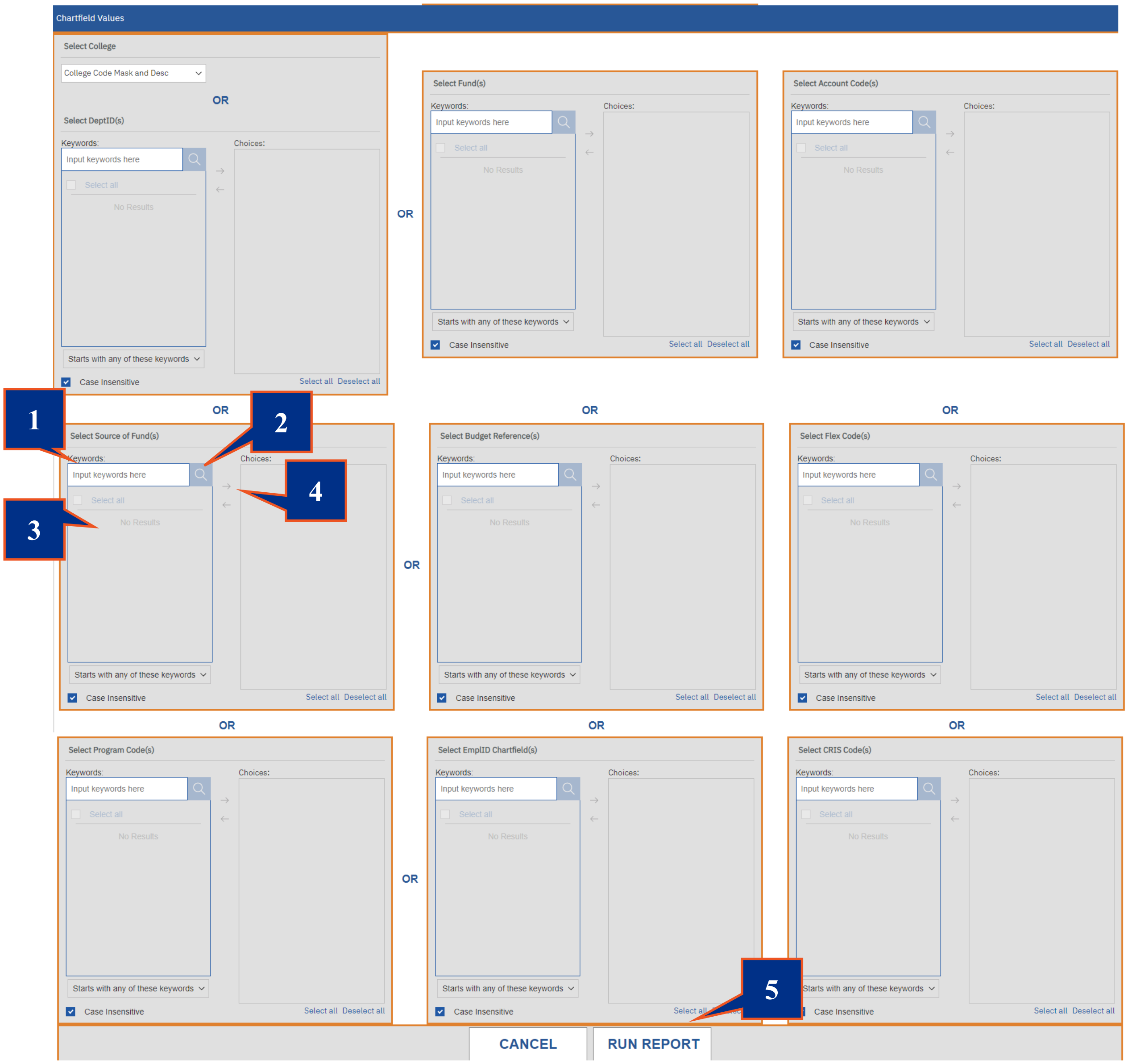


Populating the Report

The top section is for entering the date range, either by fiscal year/month (a), by a specific date range (b), or by other defined timeframes (c).



The middle section is for entering chartfield information for the desired data. Enter the values in the 'Input keywords here' field, click the magnifying glass, select the desired result and click the arrow to move it to the 'Choices' field.



The bottom section contains more detailed chartfield information that can be used to refine the report, such as:

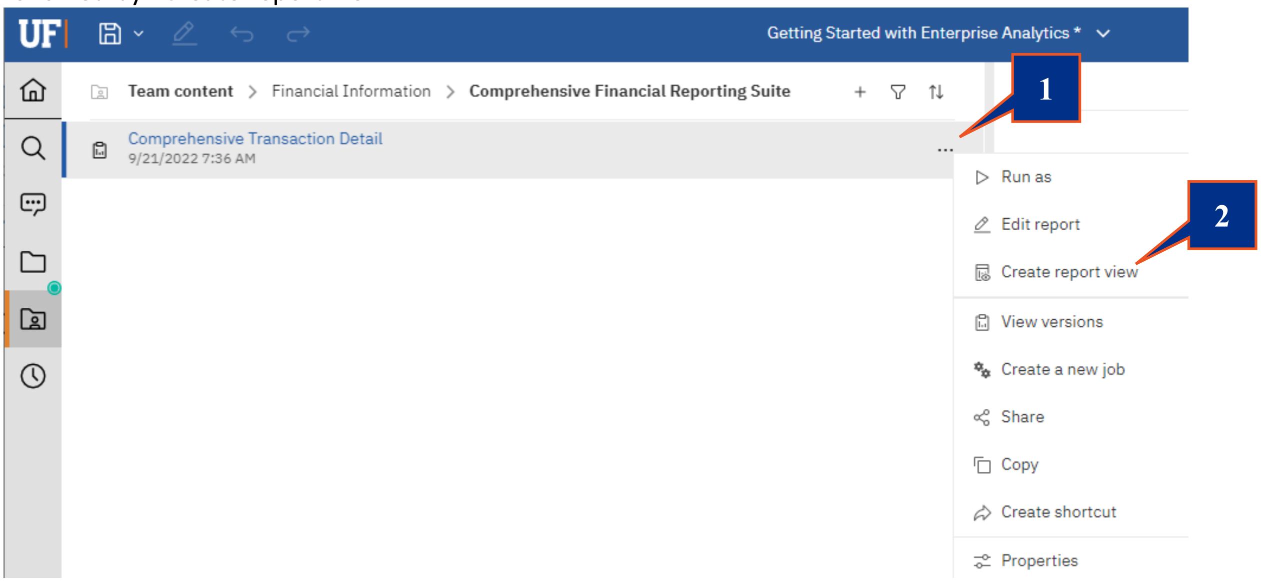
- Project ID(s)
- Award ID(s)
- Award PI UFID(s)
- Project Manager UFID(s)
- Sponsor(s)

Schedule the Report

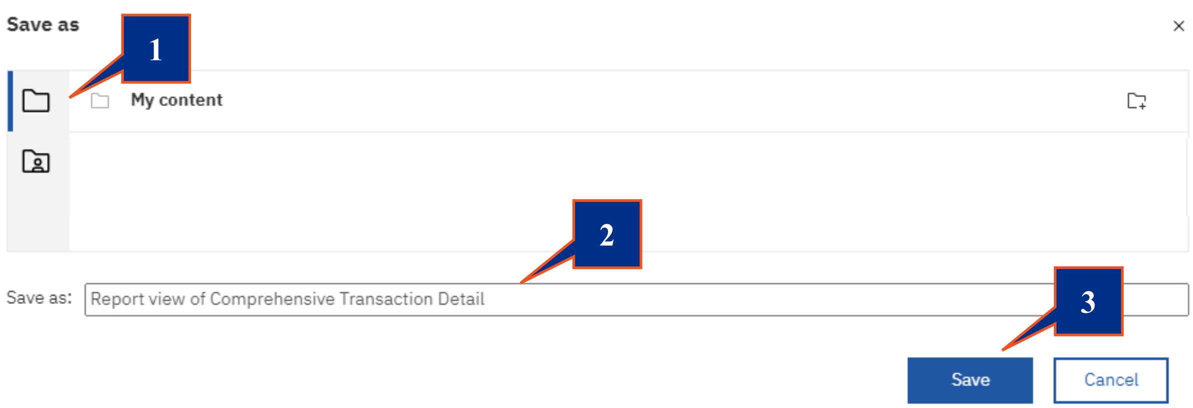
If the report proved to be helpful and there is interest to have it scheduled to automatically run, proceed with the following instructions.

Prior to running the report, save a copy (not a shortcut) of the report to your ‘My content’ folder:

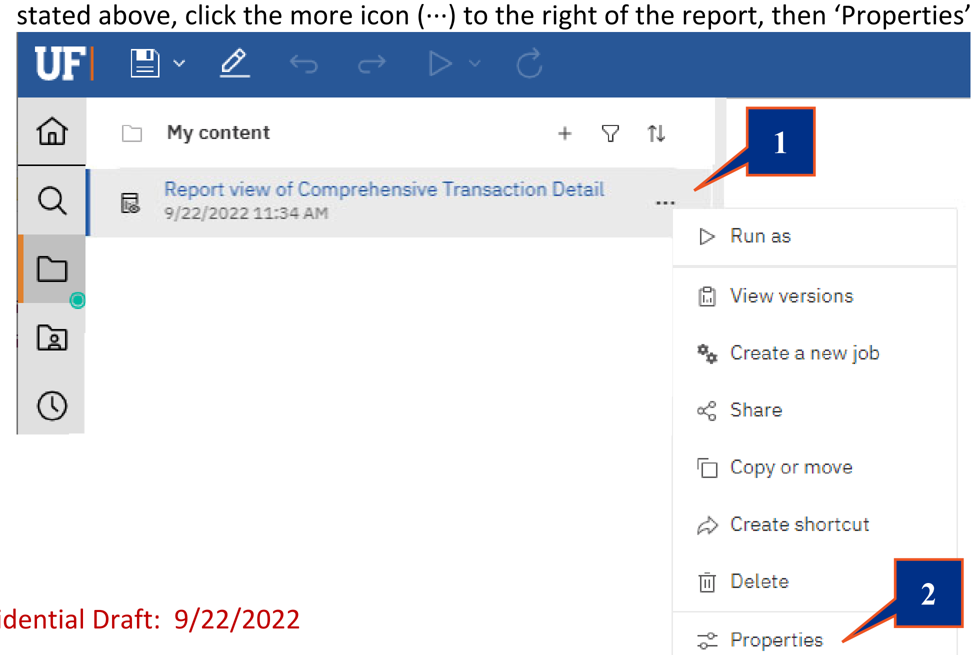
- After using the navigation to the report, click the more icon (···) to the right of the report, followed by “Create report view”



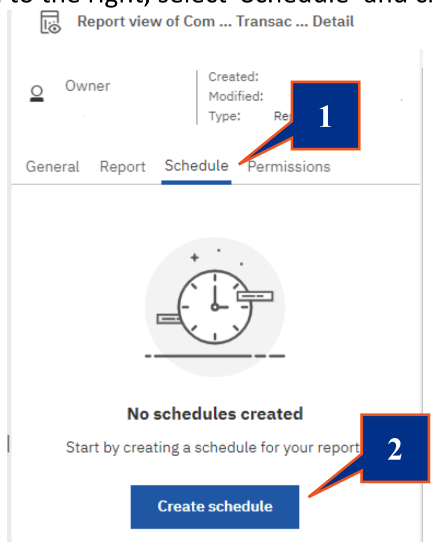
- Select the blank folder, labeled ‘My content’, then name the report and click ‘Save’



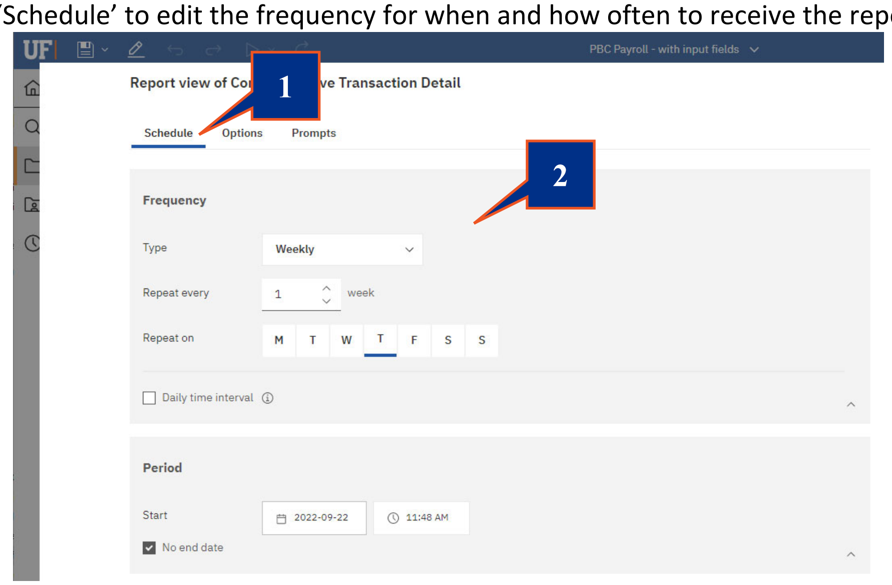
- Navigate to the saved report in ‘My content’ folder. to After using the navigation to the report stated above, click the more icon (···) to the right of the report, then ‘Properties’



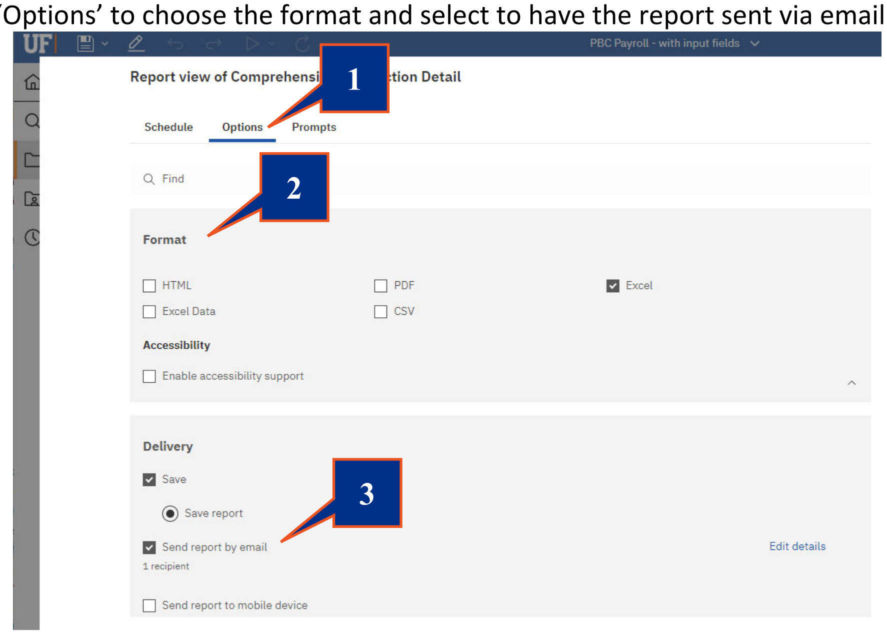
- A slide window will open to the right, select ‘Schedule’ and click ‘Create schedule’



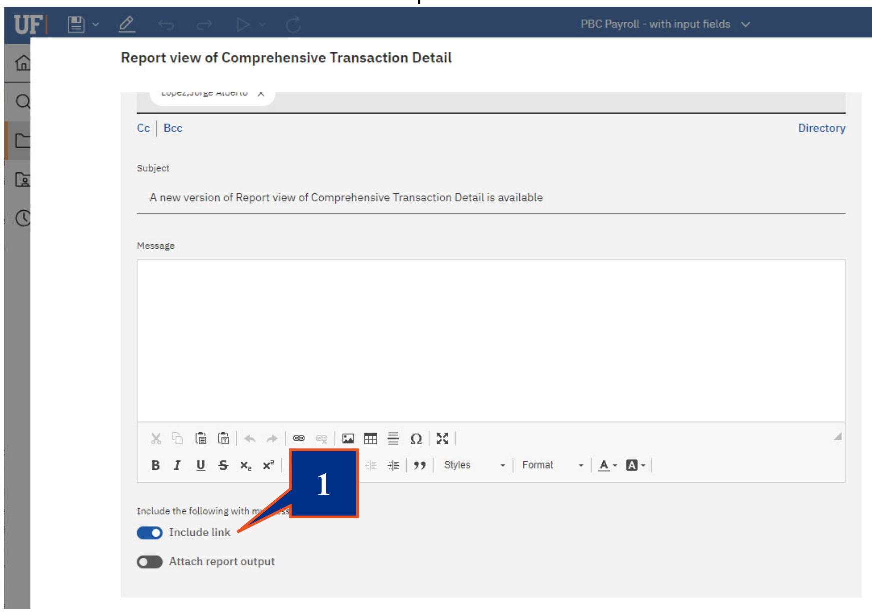
- Select ‘Schedule’ to edit the frequency for when and how often to receive the report



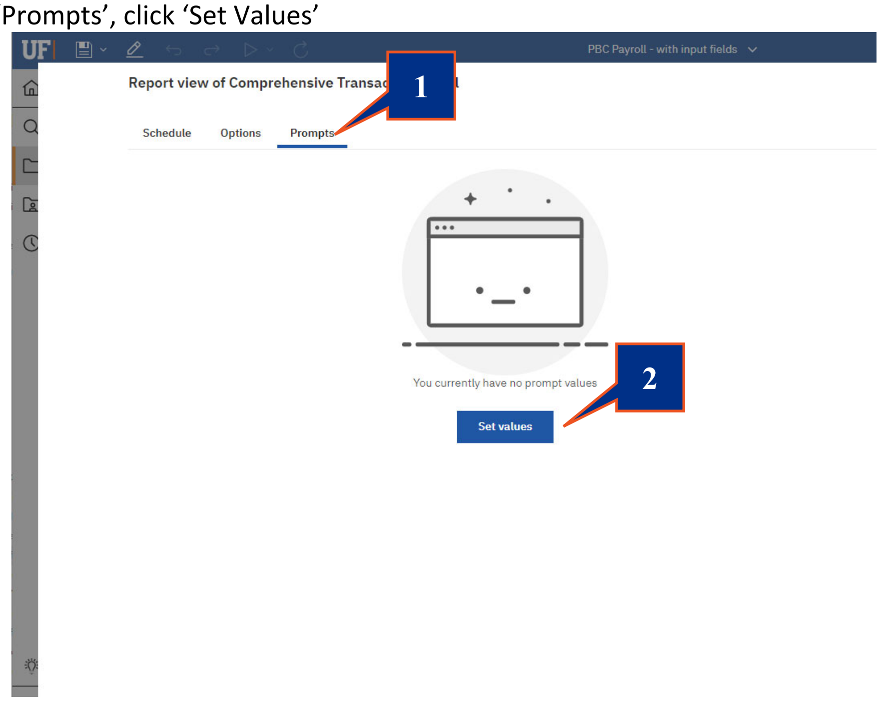
- Select ‘Options’ to choose the format and select to have the report sent via email



- 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. This will also ensure that large files are not prevented from being sent through email. The recipient will have to log into Enterprise Analytics. Gatorlink will authenticate their permissions



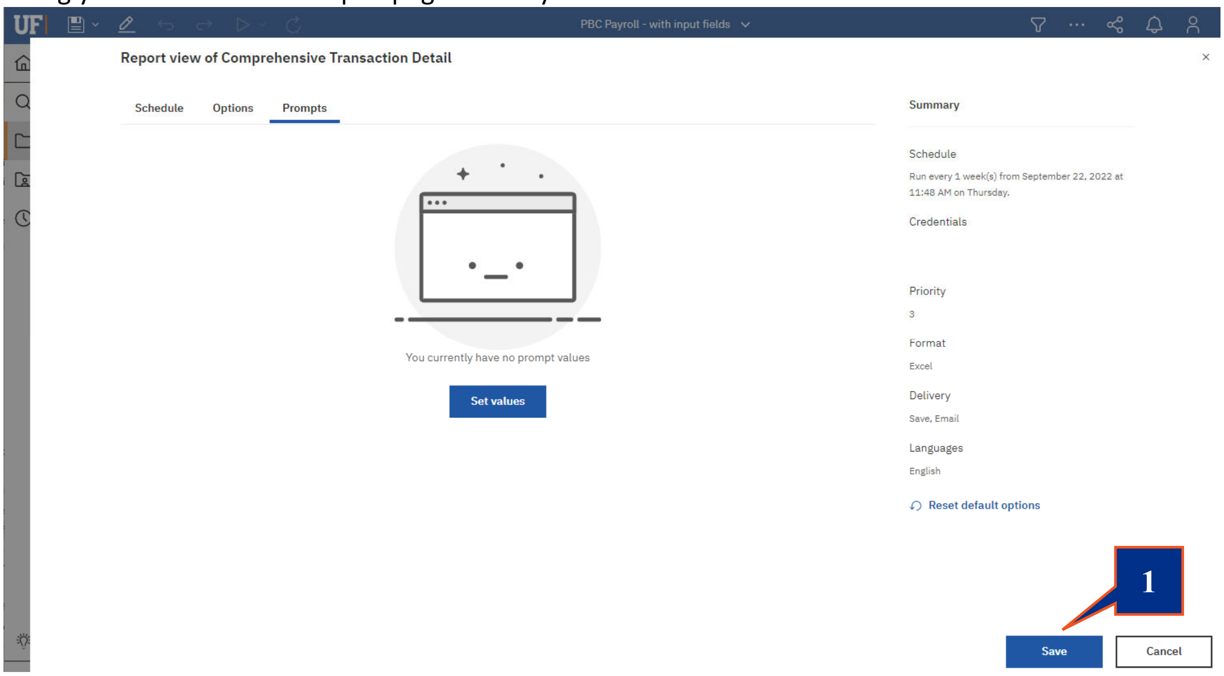
- Select 'Prompts', click 'Set Values'



- Enter the values as covered above in an earlier section, ***Populating the Report***

- Click 'Run Report' to save the values

- This will bring you back to the ‘Prompts’ page where you can click ‘Save’ to finalize



- The final step is to select ‘Enable’ from the slide window that’s open on the right