Create View, Set Prompts and Schedule an Email

In this example, you will create a view, set the prompts and schedule it to be delivered.

1. Login to myUFL
   - Open an internet browser
   - Navigate to my.ufl.edu
   - Click the Access myUFL button
   - Enter your GatorLink username and password
   - Click the Login button

2. Click the **Main Menu > Enterprise Reporting > Access Reporting**

3. Find a report you want to replicate. For this example, I’m using the Employee Training Record

4. Click the **Create a report view of this report** icon.

5. Click the **Select My Folders** link.

6. Click the **Finish** link.

7. Click the **My Folders** link.
   - You have now created a view of the Employee Training Record.

8. Click the **Set properties** button.

9. Click the **Report view** link.

10. Click the **Default action** list.

11. Point to the **Run the report** list item and select the **Run the report** list item.

12. Click the **Override the default values** option, and select the **Format** list, **PDF**.

13. Click the **Set** link.
   - This is where you will set the prompts for this report.

14. Click the **Prompt for values** option to remove the check and use only the prompts you entered.

15. Click the **OK** link.

Next you’ll need to set the calendar and schedule the email.

16. Click the **Calendar** link and select the start time and end times.

17. Click the **Override the default values** option.

18. Click the **Edit the options** link.

19. Your email address appears in the To field. Add other people to the list as needed.
• The **Subject** field will be the subject of the email. If you leave this alone, when the recipient sorts his or her email, it will appear together.
• Click in the **Body** of the email and enter what you would have appear there.

20. Click the **Attach the report** option.
• **Include a link to the report** will give the recipients access to the report via a link. To access the link, he or she would have to be signed in.
• **Attach the report** means that a copy of the report will be attached to the email.

21. Click the **OK** button.

22. Click the **OK** button.

If you need assistance Contact the UF Help Desk:
• 392-HELP
• helpdesk@ufl.edu