# Introducing BusinessObjects 4.3:
## the “new ART”

**SAP BusinessObjects** is a Software program used to build and store reports which help making HMIS data actionable.

NC COALITION to end HOMELESSNESS

# Presentation Agenda

## Welcome to BusinessObjects

- Accessing BusinessObjects
- BI Launch Pad

## Reporting Folders

- Navigating Folders
- Report Actions

## Running Reports

- Viewing a Report
- Scheduling a Report
- Prompts

## Locating Scheduled Reports

- Instances
- BI Inbox

## Additional Information

- Refresh/Warehouse Build
- Common Errors
- ZenGuide Resources

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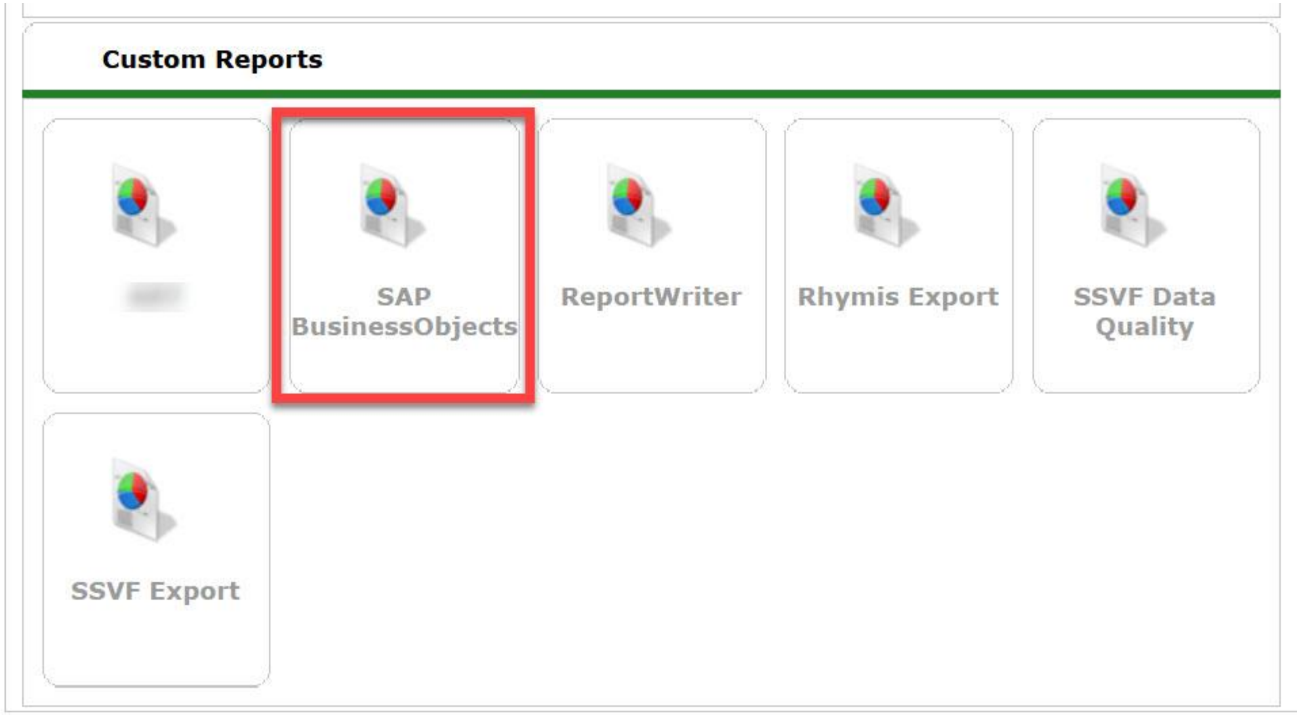
# Welcome to BusinessObjects

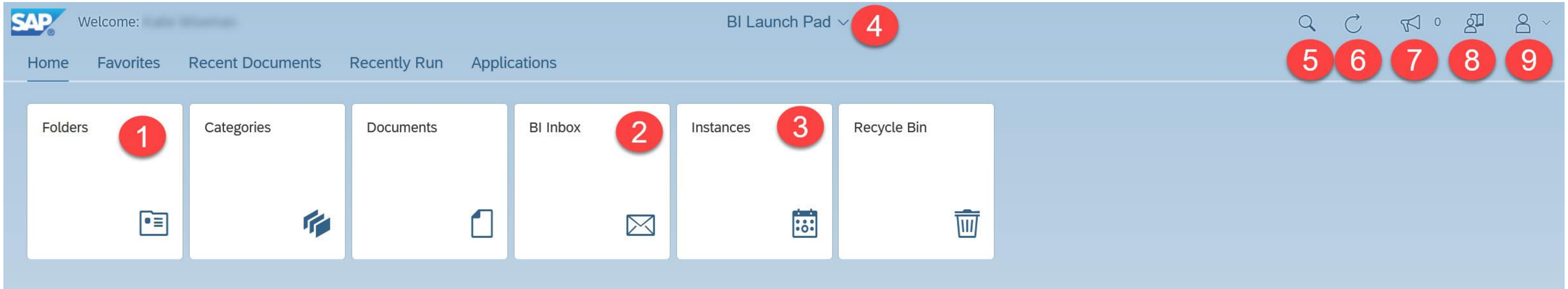
# Accessing BusinessObjects

There are two ways to open BusinessObjects:

1. Click on the **Connect to BusinessObjects** link found in the upper right corner of HMIS (below Back Date Mode) **available after 5/27/2022 or later*
2. Click on **Reports** from the menu on the left side of the HMIS dashboard. Then click on **SAP BusinessObjects**



# BI Launch Pad




1."Folders (formerly ART Browser)" : opens the folder structure to locate the individual report(s)
2."BI Inbox (formerly inbox)" : opens the inbox which contains the last year of scheduled reports assigned to the inbox
3."Instances (formerly Scheduled Reports)" : opens a list of reports scheduled within the last 60days
4."BI Launch Pad (new feature)" : This menu can be utilized to flip between different open reports
5."Search Tool" search for reports by name
6."Screen Refresh" : refresh your BusinessObjects Home Page, if needed
7."Announcements" : These are announcements that are made by the vendor.
8."User Guide" : user guide created by the vendor
9."User Settings" : This allows customization of BusinessObjects Launch Pad.

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# Report Folders

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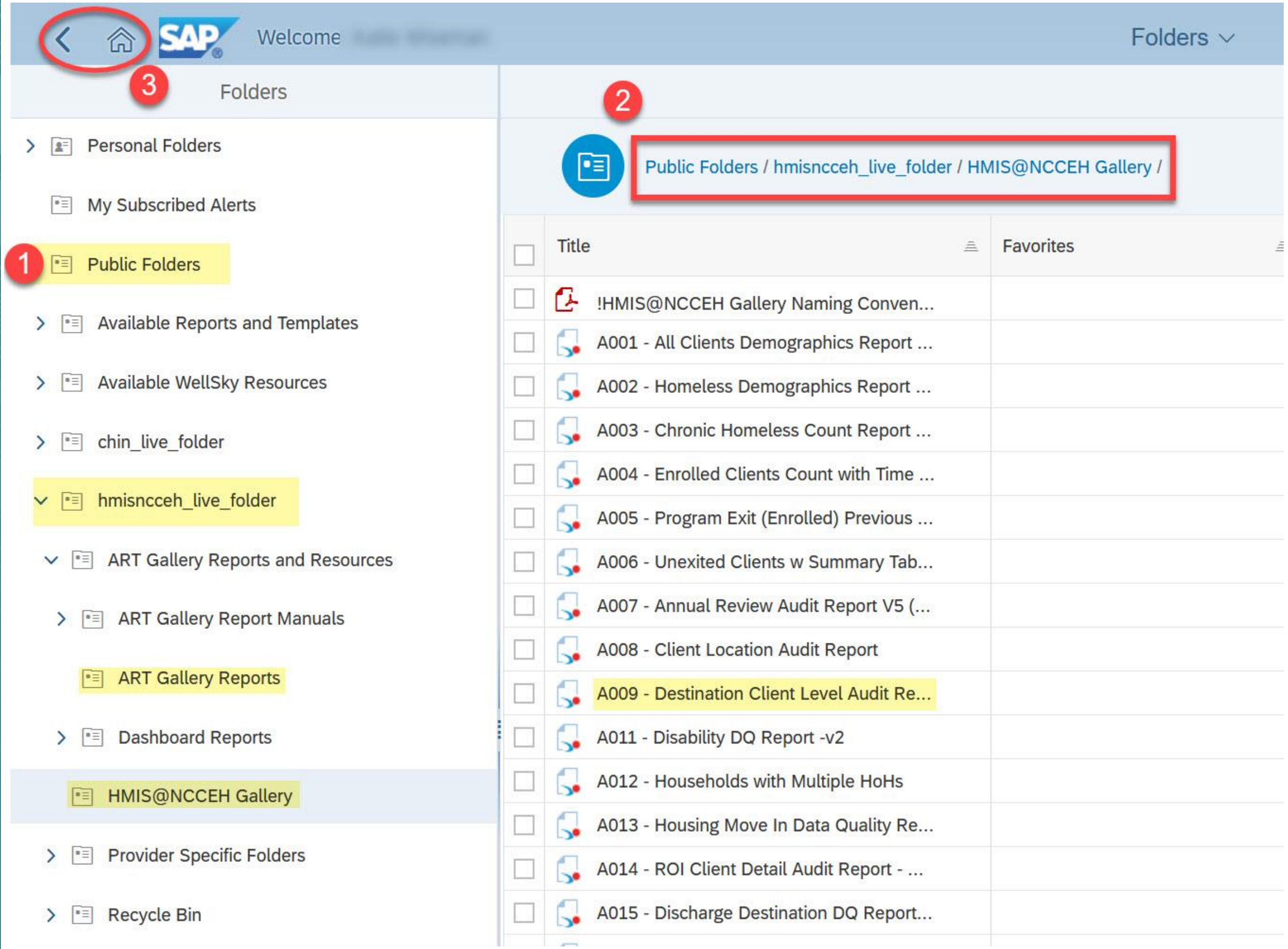
# Accessing Reports

From the Folders tiles:

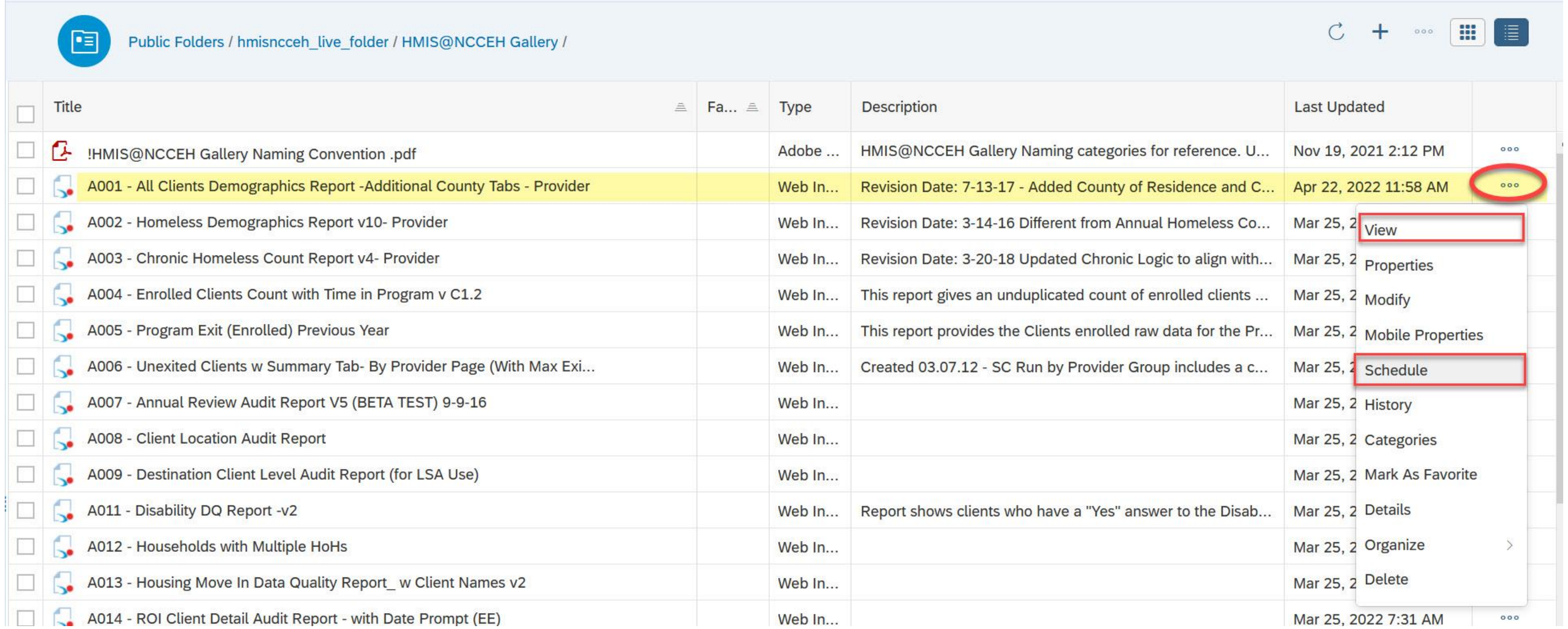
1. The subfolder structure will appear, from which you can navigate to the individual reports
2. As you open folders, they will be added to the **breadcrumb trail**. Jump to a folder by clicking on its name in the breadcrumb trail.
3. To return to the home screen, you can click either the **Back** button or the **Home** button.

**Reminder!** ***The "ART Gallery Reports" are vendor created reports. The "HMIS@NCCEH Gallery" are custom reports specific for this implementation.***



# Report Folder Actions

Click on the **Actions** icon to see a list of available report actions.




## Available Actions:

- **View** or **Schedule:** used to run reports
- **History:** displays past report "instances", or saved copies, previously scheduled
- **Details:** displays additional information about a report

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# Running Reports

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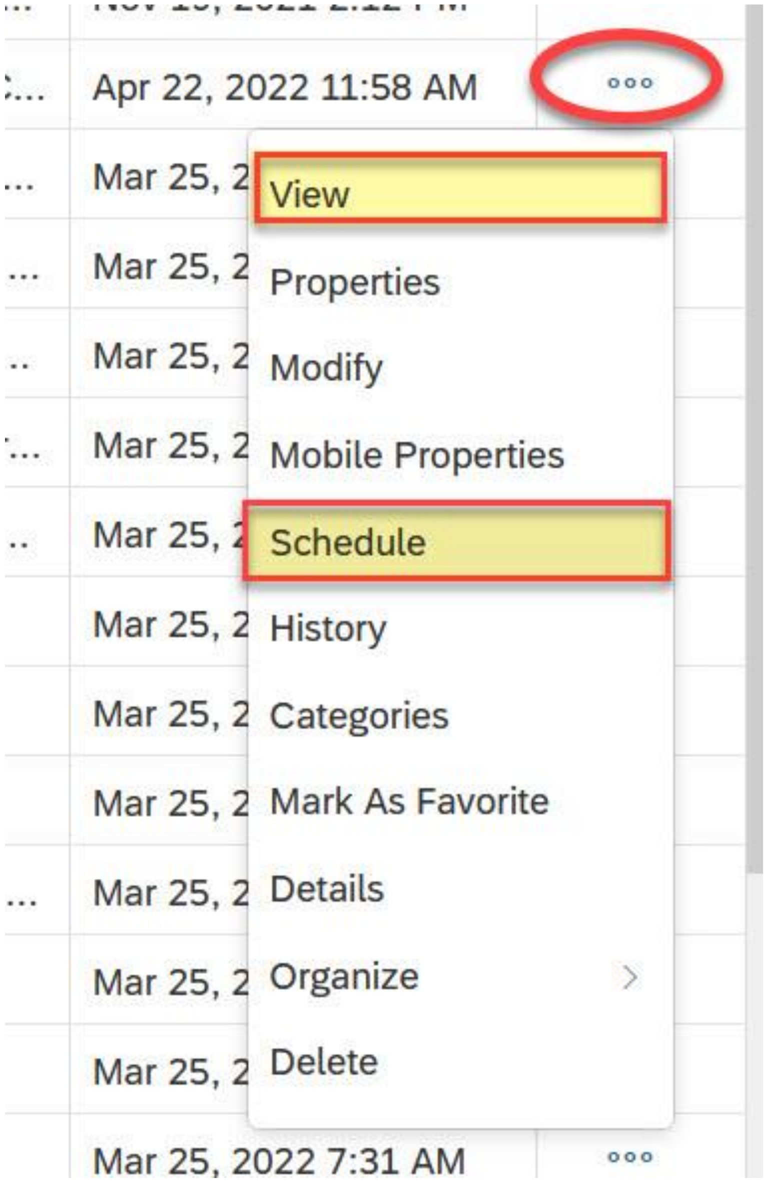
# There are two options to run reports:

1. Clicking on the name of the report or selecting the **View** option from the actions menu opens in View Mode. This mode lets you run a report immediately.
2. Selecting the **Schedule** option from the actions menu lets you schedule a report to run at a chosen time. You can also open the actions menu by clicking on its icon or by right-clicking on a report.

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# Running reports:
# VIEW MODE

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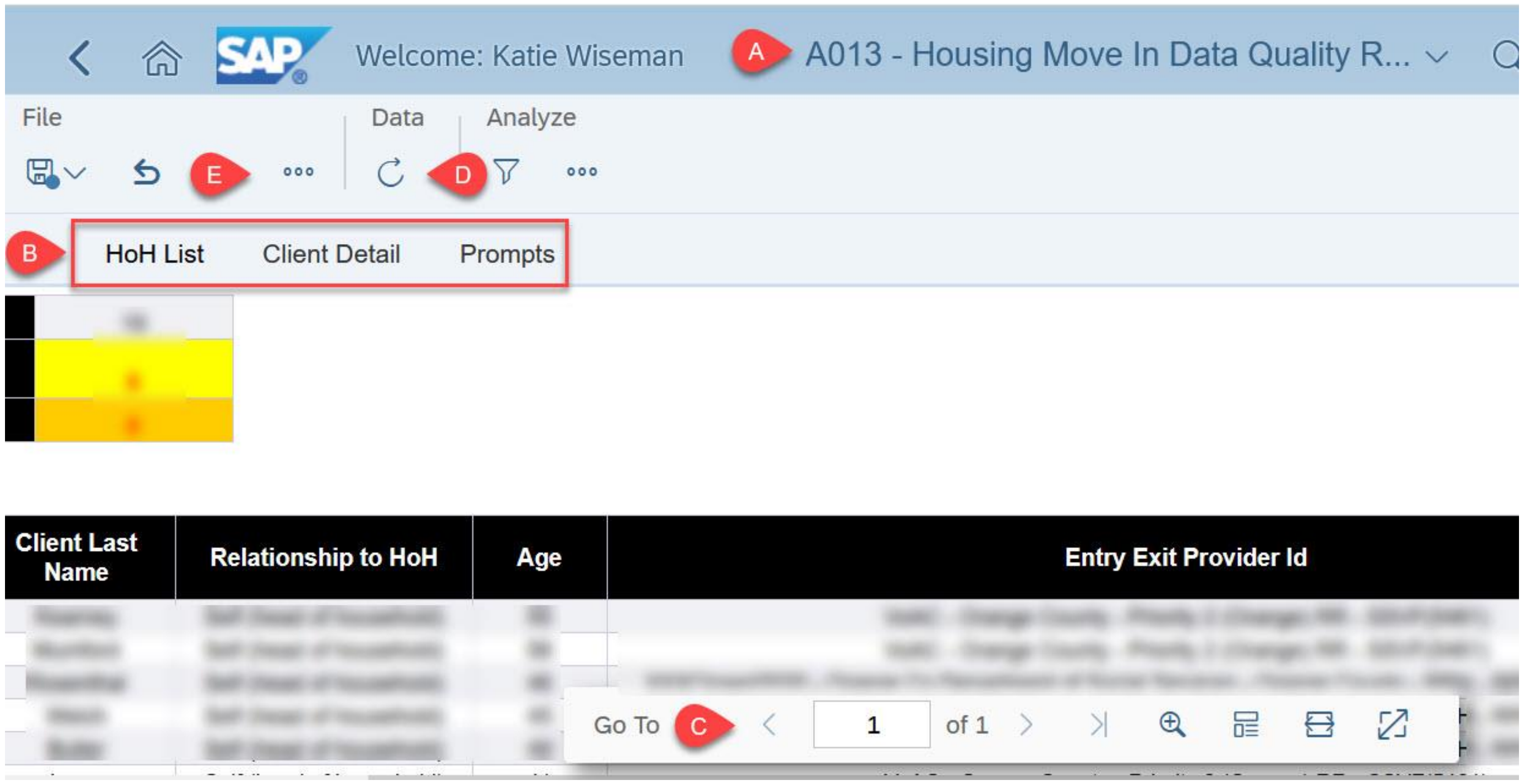
# Reviewing the Report




Once the prompts were entered and report was run, the report will appear on screen.

A. Report **Title**

**B. Tabs**

**C. Page Navigation** within each tab

**D. Refresh** to select new prompts

**E. Additional Options** to download and print the report

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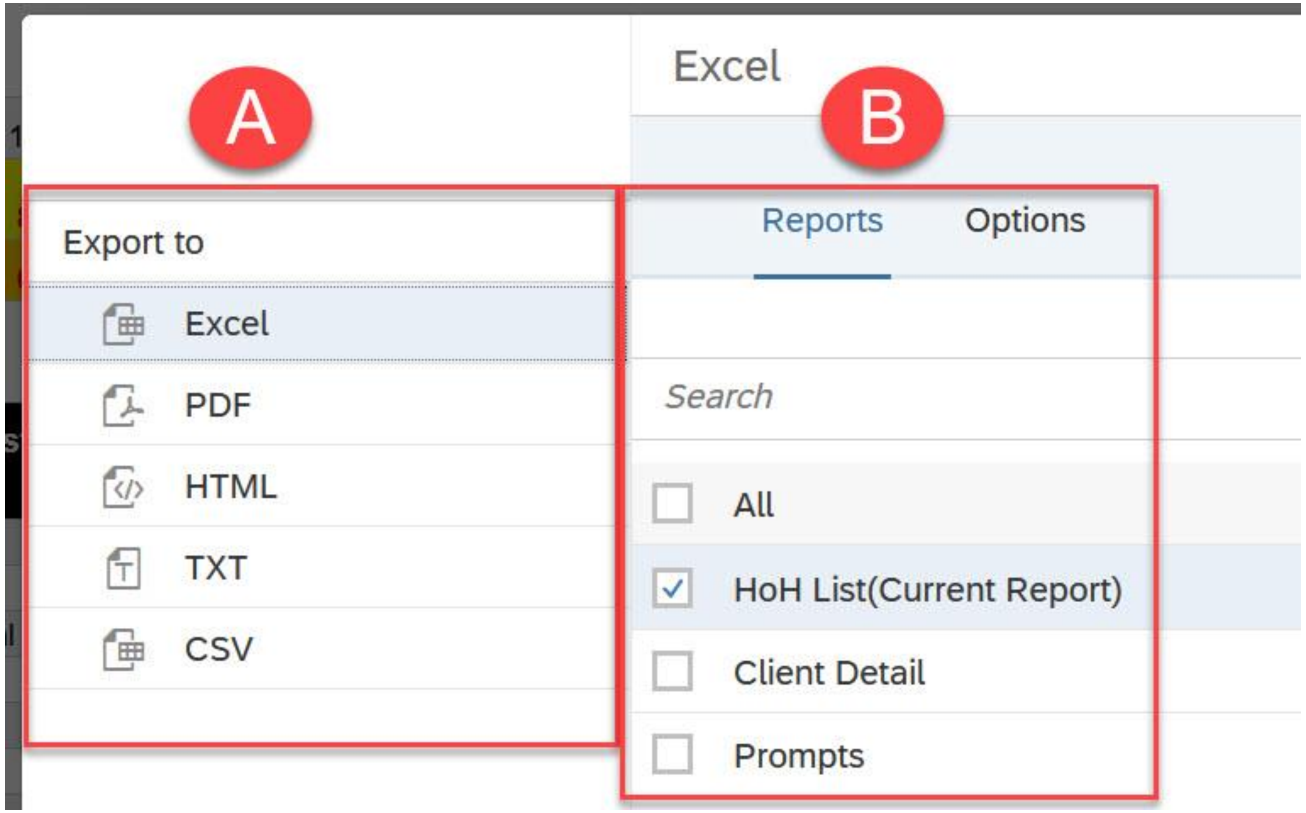
# View Mode: Exports

Exporting from View Mode allows for report format customization. The recommended formats for HMIS@NCCEH users are:

1. Excel
2. PDF
3. CSV - *for Mac users without access to Microsoft excel*

It also allows for customization for what ***TABS*** on the report should be exported!

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# Running reports:
# SCHEDULE MODE

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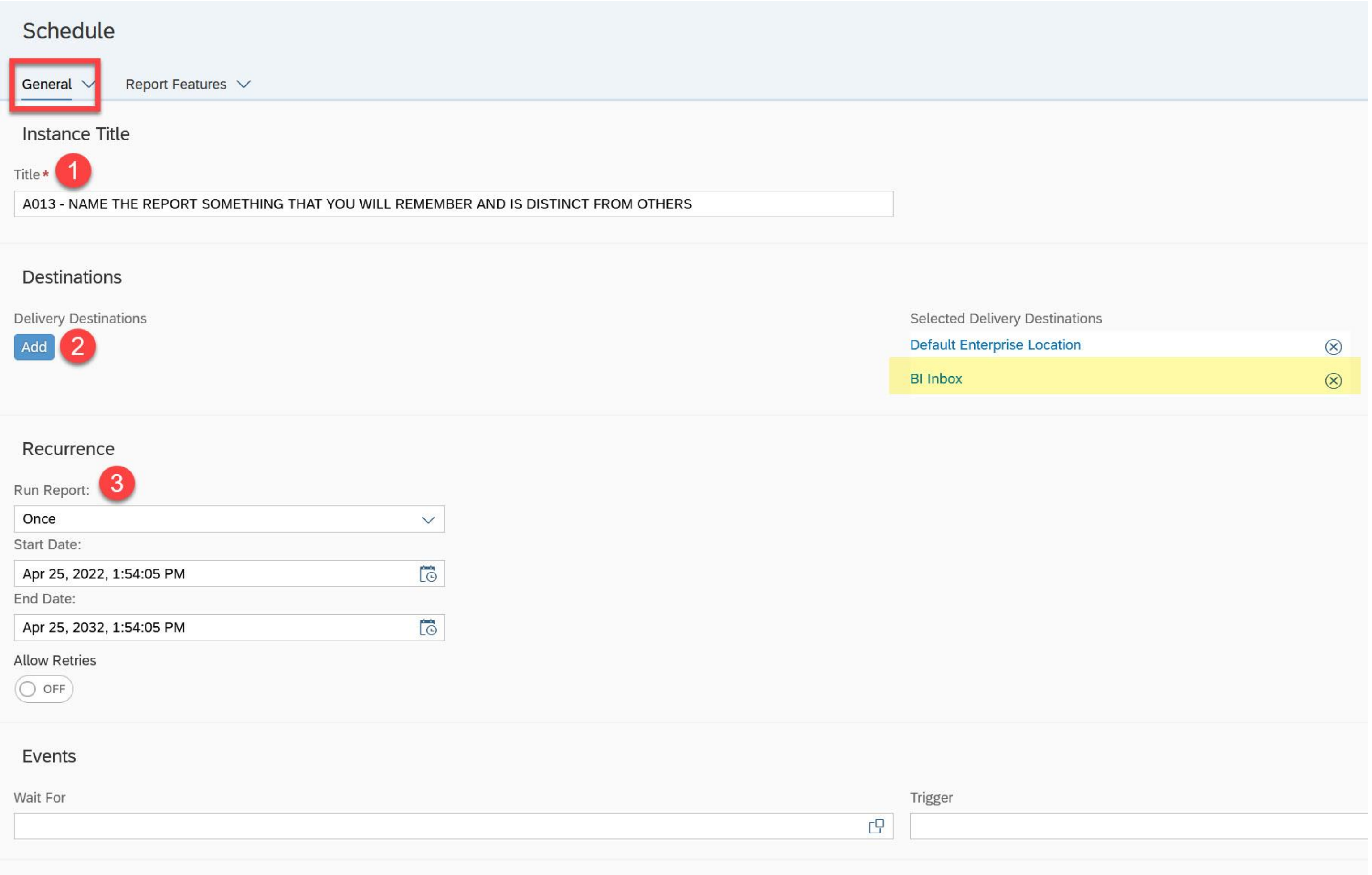
# Scheduling the Report: Instance Details

The **General** details tab of scheduler requires details about when you want the report to run, where you want the report to be stored when complete, and what you want the report to be called when done.

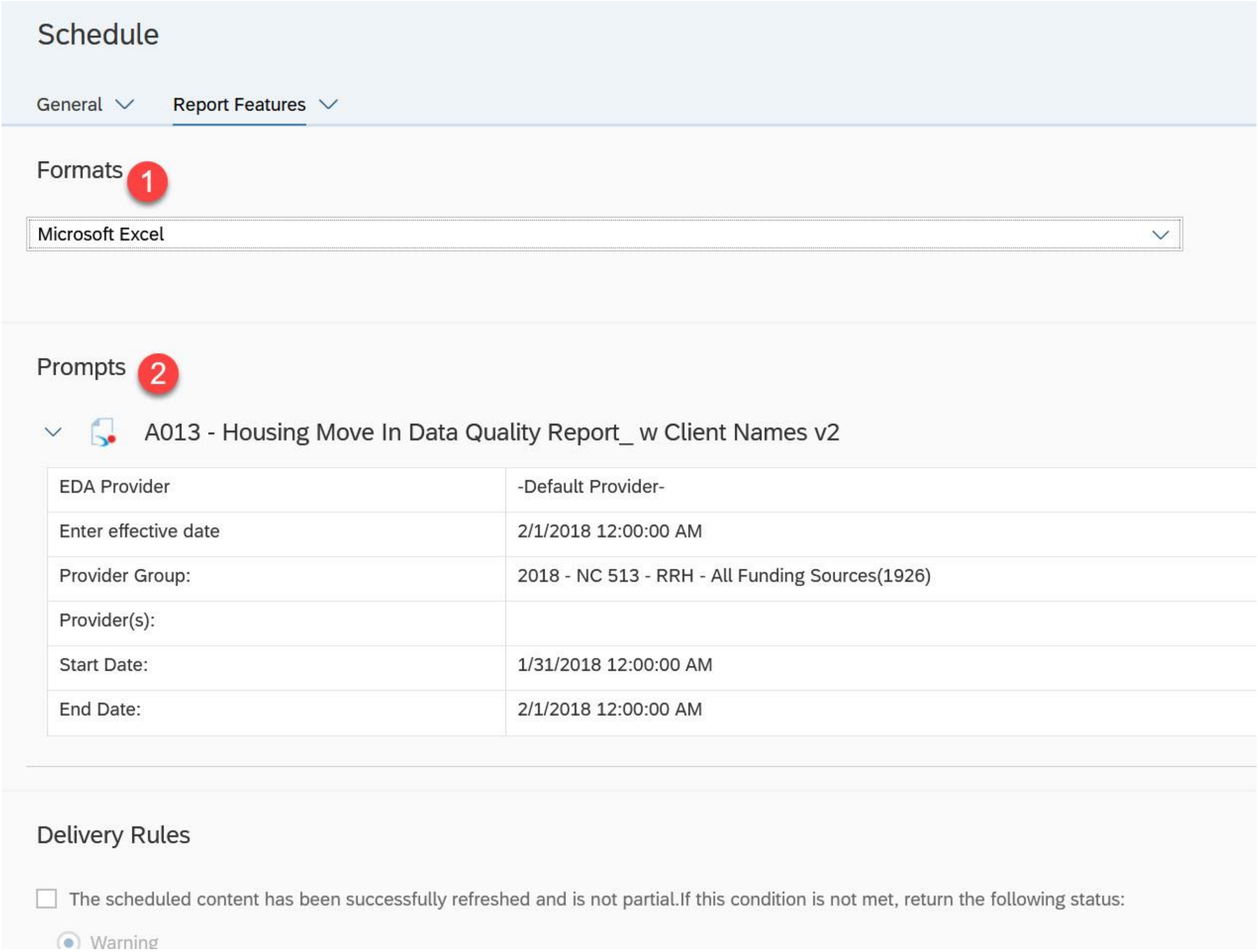
1. Instance **Title**
2. **Delivery Destination**
   - *ALWAYS ADD __BI INBOX__*
3. **Run Report** Frequency
   - Now = immediately
   - Once = one time on the date selected
   - Recurring = multiple runs, dependent on the frequency selected



# Scheduling the Report: Report Features

The **Report Features** details tab of scheduler requires the report format and details within the report (via “prompts”)

1. Report **Format**
   - ❖ Should always be Excel or PDF
2. **Prompts**
   - ❖ Prompts can be edited here

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# Accessing Scheduled Reports

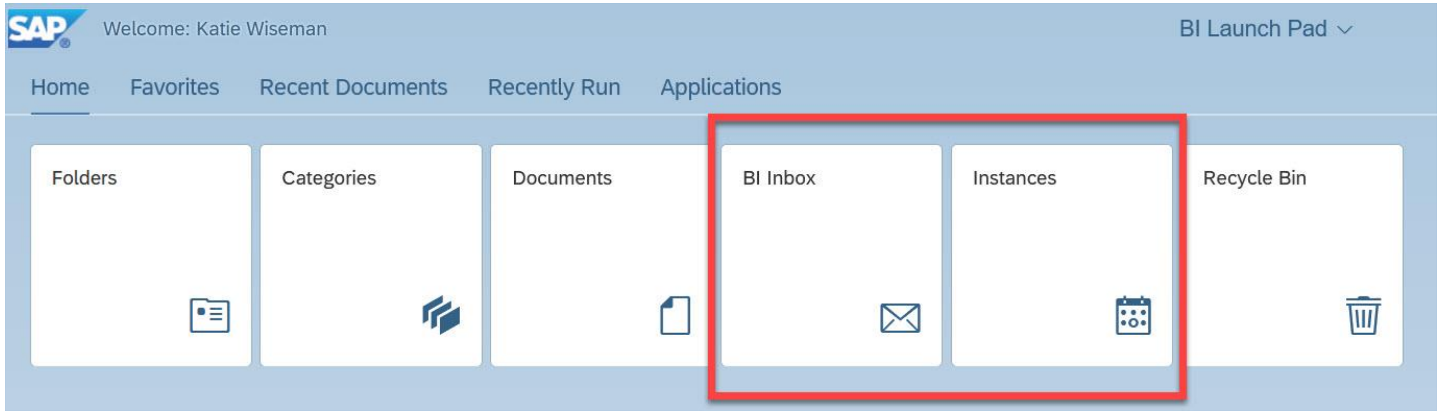
Once reports are scheduled, there are two potential locations to find the reports:

**A. BI Inbox**

- Location for reports manually selected to go to this location
- Remain for up to 365 days

**B. Instances**

- All reports automatically go here
- Remain for up to 60 days




*Both locations are accessed via the BI Launch Pad (BusinessObjects dashboard/home page)*

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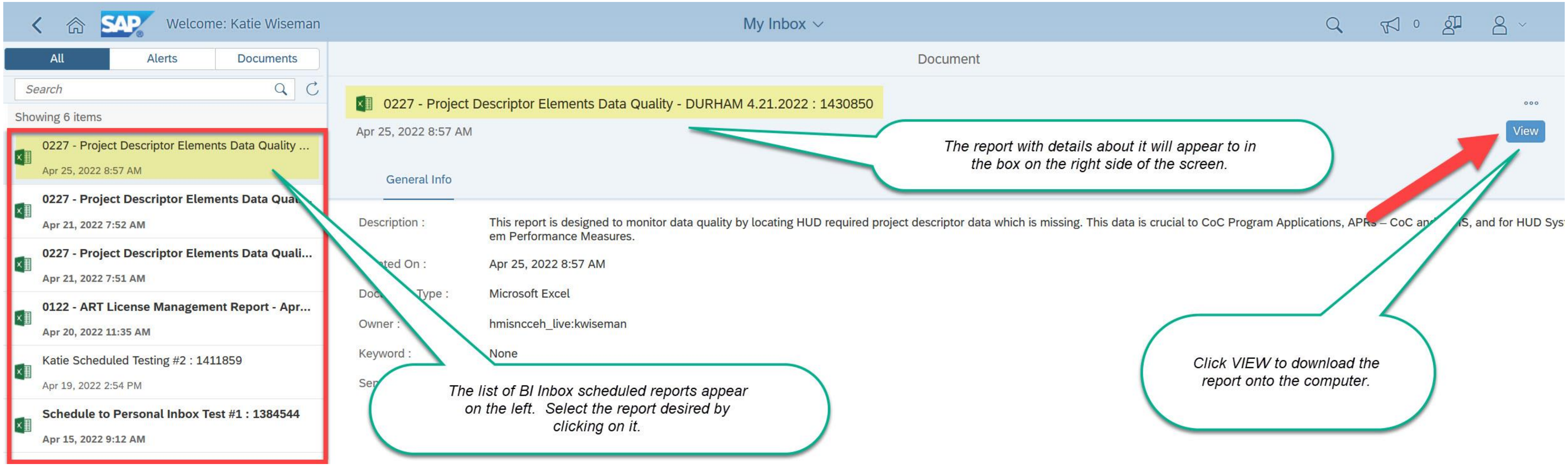
# Scheduled Reports:  BI Inbox

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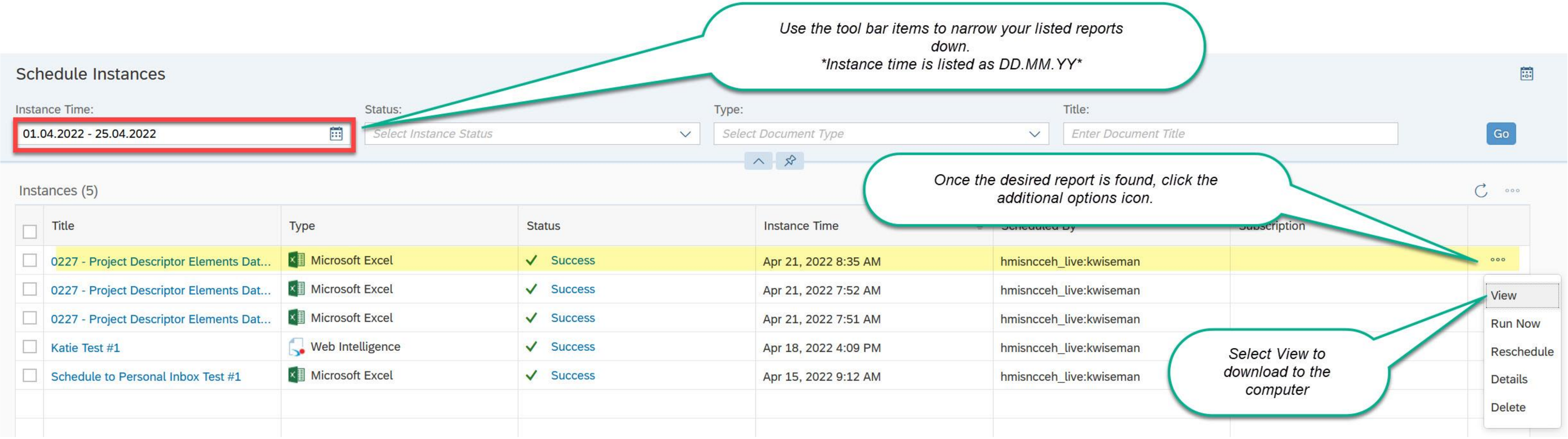
# Scheduled Reports:  Instances

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| INSTANCES | BI INBOX |
| --- | --- |
| 60 days | 365 Days / 1 year |

**REMINDER: The system will automatically delete reports!**

- Reports saved in your Instances folder will be automatically deleted after 60 days; reports in your BI Inbox, however, can be kept for up to a year (365 days).
- If a report needs to be preserved for a longer time period, it should be saved in a secure location outside of the reporting tool.

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# Additional Information

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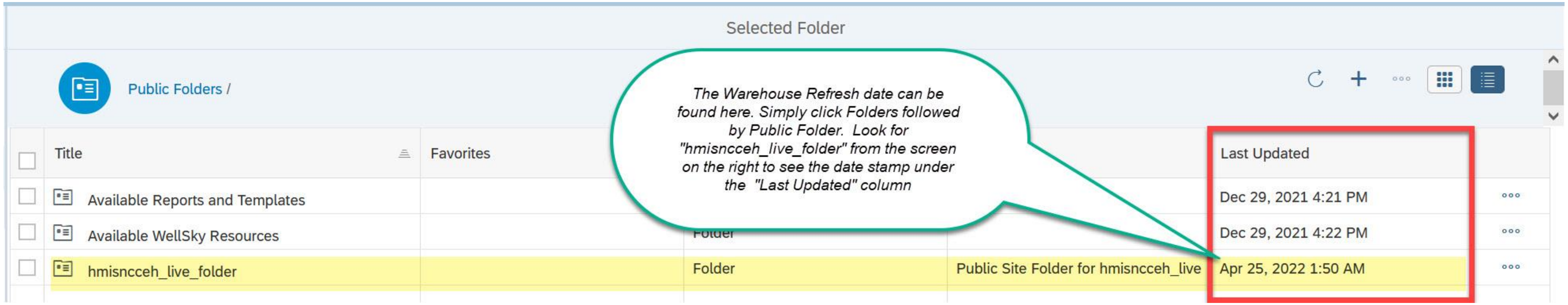
# Warehousing Refresh

Just like the previous platform (ART), BusinessObjects is not live. The platform “copies” data entered into the system each evening so that it is available for reporting use the following day.

Basically, data you enter or edit in HMIS today will be unavailable for BusinessObjects reporting until tomorrow.

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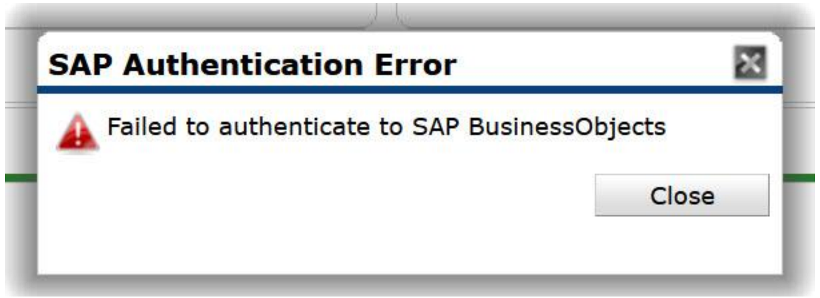
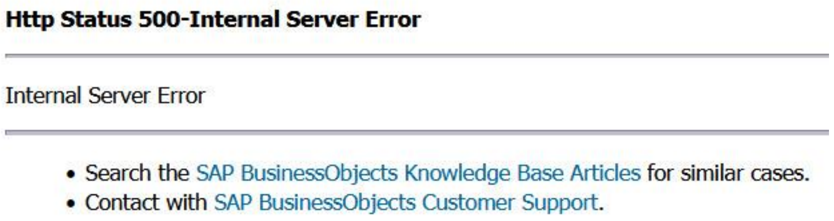
# Known System Errors:

1. Platform Not Loading
2. System Not Connecting




**Platform Not Loading**: This error occurs the day the user has a password reset. *Must wait until the next day to use BusinessObjects.*




**System Not Connecting**: This error occurs when attempting to log into the platform too quickly. *Log out of BusinessObjects and click to connect again.*

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# Are you ready for a live demo?

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# Have a Question About a Report?

## Check out the detailed ZenGuide reference sheets put together just for BusinessObjects!

https://ncceh.zendesk.com/hc/en-us

HMIS Reporting

**Dashboard (Canned) Reporting Knowledge Base**

**Advanced Reporting Knowledge Base (Business Objects)**

- BusinessObjects Known System and User Errors
- How to Schedule BusinessObjects Reports
- How to View BusinessObjects Reports
- Using BusinessObjects 101

If you still have questions, contact the HMIS@NCCEH Data Center at: **hmis@ncceh.org**

To ensure we can offer the best possible support, we recommend the following:

- Schedule the report, using the Microsoft Excel file format.
- Include the report's name and prompt values in your email.
- Share any client ID numbers of interest.

If you choose to attach a copy of the report or include any screenshots, please remove any Personally Identifiable Information (PII) like client names or Social Security Numbers first!

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