

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
HOMELESSNESS end

Presentation Agenda

Welcome to BusinessObjects

- Accessing BusinessObjects
- BI Launch Pad

Locating Scheduled Reports

- Instances
- BI Inbox

Reporting Folders

- Navigating Folders
- Report Actions

Additional Information

- Refresh/Warehouse Build
- Common Errors
- ZenGuide Resources

Running Reports

- Viewing a Report
- Scheduling a Report
- Prompts



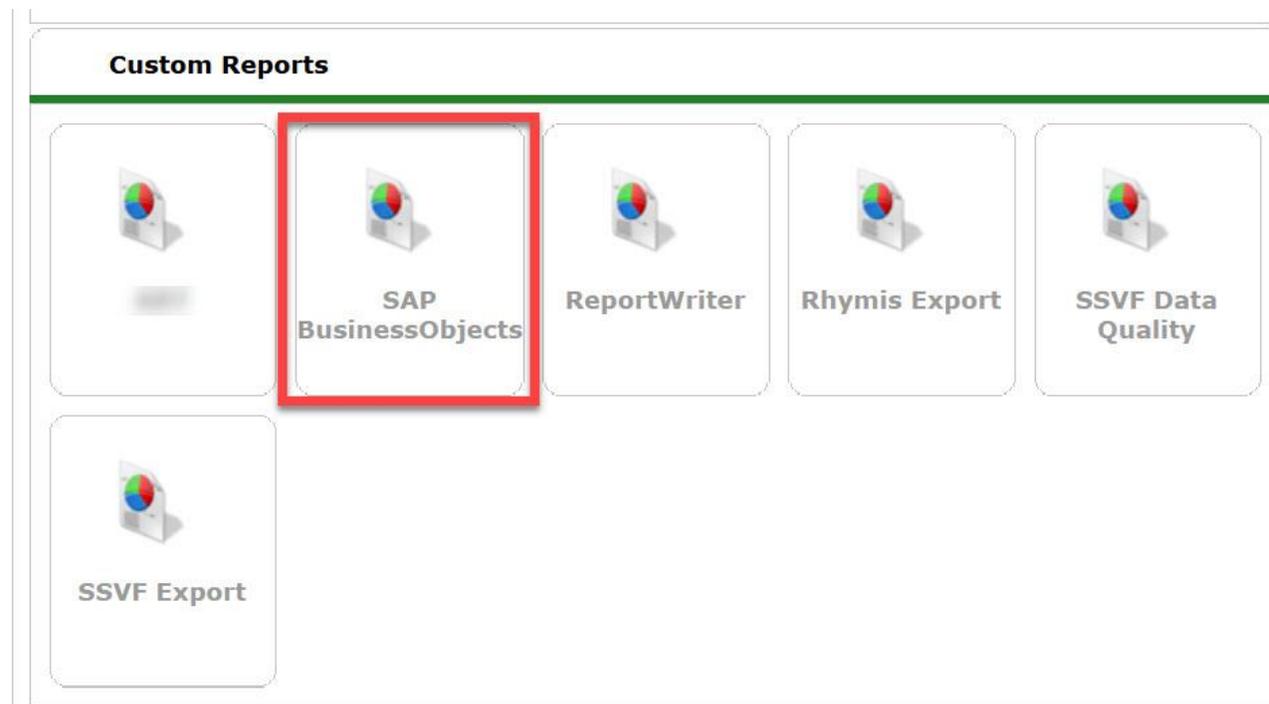


Welcome to BusinessObjects

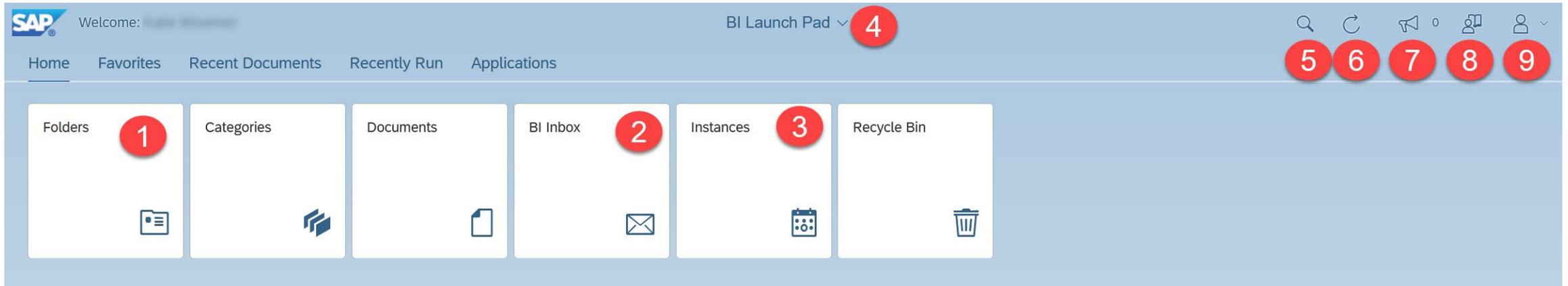
Accessing BusinessObjects

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.

Report Folders

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.*

The screenshot displays the SAP Fiori 'Folders' view. At the top, the SAP logo and 'Welcome' message are visible. A red circle with the number '3' highlights the Home icon in the top navigation bar. The main content area shows a tree view of folders. A red circle with the number '1' highlights the 'Public Folders' folder. Below it, the 'hmisncceh_live_folder' is expanded, and the 'HMIS@NCCEH Gallery' folder is highlighted. A red circle with the number '2' highlights the breadcrumb trail at the top of the report list, which reads: 'Public Folders / hmisncceh_live_folder / HMIS@NCCEH Gallery /'. The report list below shows various report titles, with 'A009 - Destination Client Level Audit Re...' highlighted in yellow.

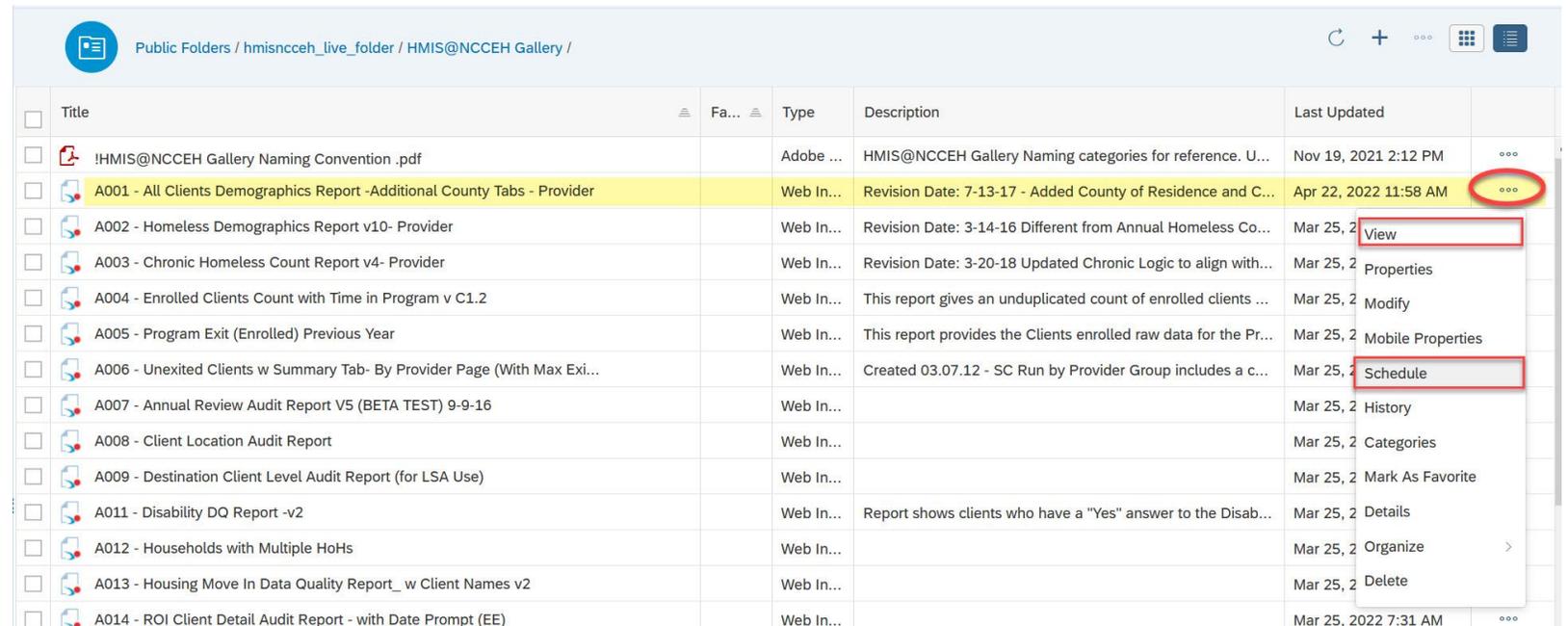
<input type="checkbox"/>	Title	Favorites
<input type="checkbox"/>	!HMIS@NCCEH Gallery Naming Conven...	
<input type="checkbox"/>	A001 - All Clients Demographics Report ...	
<input type="checkbox"/>	A002 - Homeless Demographics Report ...	
<input type="checkbox"/>	A003 - Chronic Homeless Count Report ...	
<input type="checkbox"/>	A004 - Enrolled Clients Count with Time ...	
<input type="checkbox"/>	A005 - Program Exit (Enrolled) Previous ...	
<input type="checkbox"/>	A006 - Unexited Clients w Summary Tab...	
<input type="checkbox"/>	A007 - Annual Review Audit Report V5 (...)	
<input type="checkbox"/>	A008 - Client Location Audit Report	
<input type="checkbox"/>	A009 - Destination Client Level Audit Re...	
<input type="checkbox"/>	A011 - Disability DQ Report -v2	
<input type="checkbox"/>	A012 - Households with Multiple HoHs	
<input type="checkbox"/>	A013 - Housing Move In Data Quality Re...	
<input type="checkbox"/>	A014 - ROI Client Detail Audit Report - ...	
<input type="checkbox"/>	A015 - Discharge Destination DQ Report...	

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



The screenshot shows a web interface for a report folder. The breadcrumb path is "Public Folders / hmisnceh_live_folder / HMIS@NCCEH Gallery /". The table below lists various reports with columns for Title, Fa..., Type, Description, and Last Updated. A context menu is open for the report "A001 - All Clients Demographics Report -Additional County Tabs - Provider", showing actions like View, Properties, Modify, Mobile Properties, Schedule, History, Categories, Mark As Favorite, Details, Organize, and Delete. The "View" and "Schedule" options are highlighted with red boxes.

Title	Fa...	Type	Description	Last Updated	
!HMIS@NCCEH Gallery Naming Convention .pdf		Adobe ...	HMIS@NCCEH Gallery Naming categories for reference. U...	Nov 19, 2021 2:12 PM	...
A001 - All Clients Demographics Report -Additional County Tabs - Provider		Web In...	Revision Date: 7-13-17 - Added County of Residence and C...	Apr 22, 2022 11:58 AM	...
A002 - Homeless Demographics Report v10- Provider		Web In...	Revision Date: 3-14-16 Different from Annual Homeless Co...	Mar 25, 2022	View
A003 - Chronic Homeless Count Report v4- Provider		Web In...	Revision Date: 3-20-18 Updated Chronic Logic to align with...	Mar 25, 2022	Properties
A004 - Enrolled Clients Count with Time in Program v C1.2		Web In...	This report gives an unduplicated count of enrolled clients ...	Mar 25, 2022	Modify
A005 - Program Exit (Enrolled) Previous Year		Web In...	This report provides the Clients enrolled raw data for the Pr...	Mar 25, 2022	Mobile Properties
A006 - Unexited Clients w Summary Tab- By Provider Page (With Max Exi...		Web In...	Created 03.07.12 - SC Run by Provider Group includes a c...	Mar 25, 2022	Schedule
A007 - Annual Review Audit Report V5 (BETA TEST) 9-9-16		Web In...		Mar 25, 2022	History
A008 - Client Location Audit Report		Web In...		Mar 25, 2022	Categories
A009 - Destination Client Level Audit Report (for LSA Use)		Web In...		Mar 25, 2022	Mark As Favorite
A011 - Disability DQ Report -v2		Web In...	Report shows clients who have a "Yes" answer to the Disab...	Mar 25, 2022	Details
A012 - Households with Multiple HoHs		Web In...		Mar 25, 2022	Organize
A013 - Housing Move In Data Quality Report_w Client Names v2		Web In...		Mar 25, 2022	Delete
A014 - ROI Client Detail Audit Report - with Date Prompt (EE)		Web In...		Mar 25, 2022 7:31 AM	...

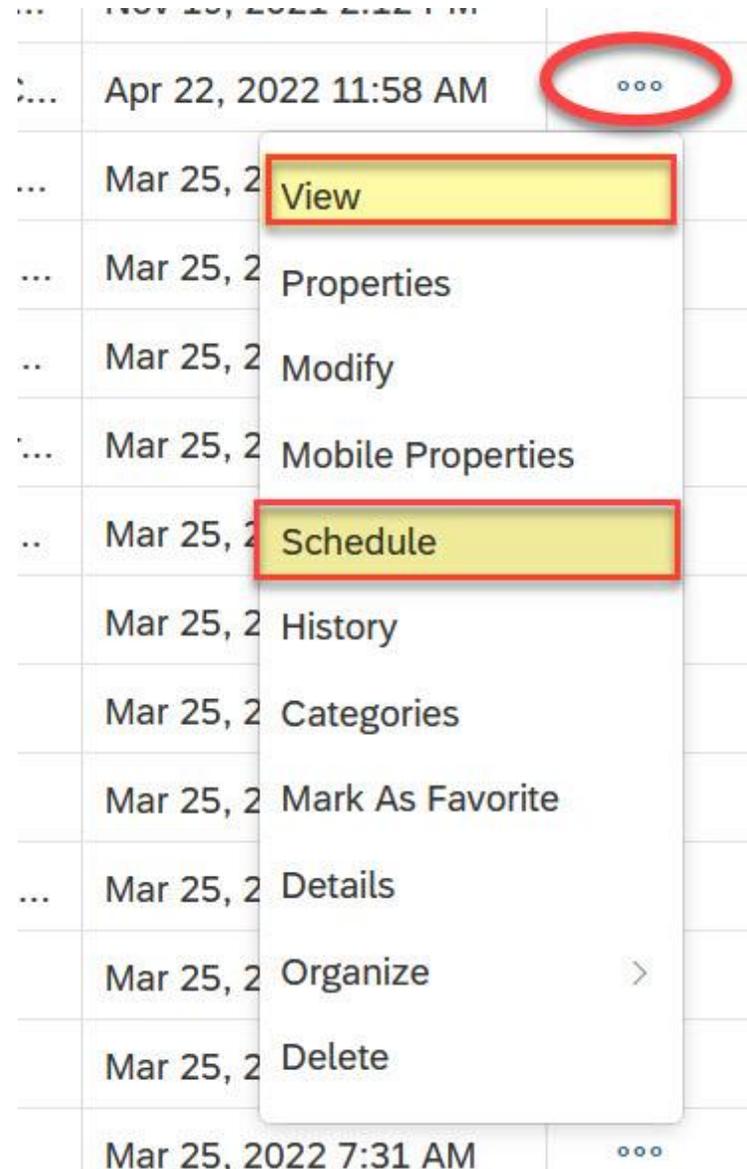
Running Reports



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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.



**Running reports:
VIEW MODE**



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Reviewing the Report

The screenshot shows the SAP report interface. At the top, the title bar displays 'Welcome: Katie Wiseman' and 'A013 - Housing Move In Data Quality R...'. Below this is a menu bar with 'File', 'Data', and 'Analyze' options. The 'File' menu includes icons for download (E), refresh (D), and filter. The 'Data' menu includes a refresh icon (D) and a filter icon. The 'Analyze' menu includes a refresh icon (D) and a filter icon. A red box highlights the 'HoH List', 'Client Detail', and 'Prompts' tabs. Below the tabs is a data table with the following columns: 'Client Last Name', 'Relationship to HoH', 'Age', and 'Entry Exit Provider Id'. The table contains several rows of data. At the bottom of the table, there is a navigation bar with 'Go To' (C), a page number '1' of '1', and icons for search, print, and share.

Client Last Name	Relationship to HoH	Age	Entry Exit Provider Id

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

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!

The screenshot shows a software interface with two main sections, A and B, highlighted with red circles. Section A, titled 'Export to', lists five options: Excel, PDF, HTML, TXT, and CSV. Section B, titled 'Excel', has two sub-sections: 'Reports' and 'Options'. Under 'Reports', there is a search bar and a list of checkboxes: 'All', 'HoH List(Current Report)' (checked), 'Client Detail', and 'Prompts'.

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

Schedule

General Report Features

Instance Title

Title* **1**

A013 - NAME THE REPORT SOMETHING THAT YOU WILL REMEMBER AND IS DISTINCT FROM OTHERS

Destinations

Delivery Destinations

Add **2**

Selected Delivery Destinations

Default Enterprise Location

BI Inbox

Recurrence

Run Report: **3**

Once

Start Date: Apr 25, 2022, 1:54:05 PM

End Date: Apr 25, 2032, 1:54:05 PM

Allow Retries

OFF

Events

Wait For

Trigger

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

Schedule

General ▾ **Report Features** ▾

Formats **1**

Microsoft Excel ▾

Prompts **2**

▾  A013 - Housing Move In Data Quality Report_w Client Names v2

EDA Provider	-Default Provider-
Enter effective date	2/1/2018 12:00:00 AM
Provider Group:	2018 - NC 513 - RRH - All Funding Sources(1926)
Provider(s):	
Start Date:	1/31/2018 12:00:00 AM
End Date:	2/1/2018 12:00:00 AM

Delivery Rules

The scheduled content has been successfully refreshed and is not partial.If this condition is not met, return the following status:

Warning



Accessing Scheduled Reports

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

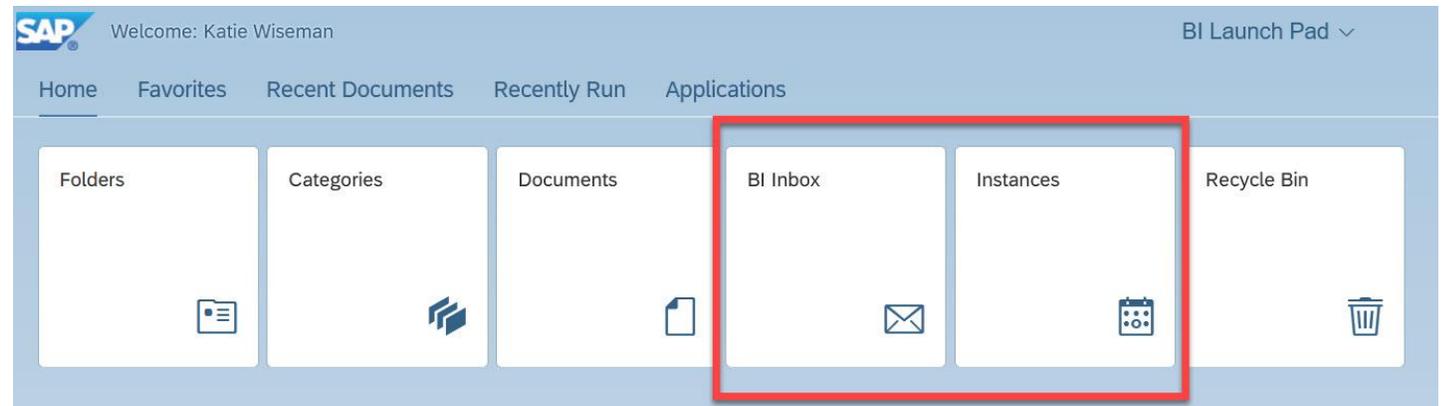
A. BI Inbox

- 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)



Scheduled Reports: BI Inbox

The screenshot displays the SAP BI Inbox interface. On the left, a list of reports is shown, with the top report highlighted. On the right, the details of the selected report are displayed, including a description, creation date, document type, owner, and keyword. A 'View' button is visible in the top right corner of the report details panel.

Callout 1: The list of BI Inbox scheduled reports appear on the left. Select the report desired by clicking on it.

Callout 2: The report with details about it will appear in the box on the right side of the screen.

Callout 3: Click VIEW to download the report onto the computer.

Report Name	Date
0227 - Project Descriptor Elements Data Quality ...	Apr 25, 2022 8:57 AM
0227 - Project Descriptor Elements Data Quali...	Apr 21, 2022 7:52 AM
0227 - Project Descriptor Elements Data Quali...	Apr 21, 2022 7:51 AM
0122 - ART License Management Report - Apr...	Apr 20, 2022 11:35 AM
Katie Scheduled Testing #2 : 1411859	Apr 19, 2022 2:54 PM
Schedule to Personal Inbox Test #1 : 1384544	Apr 15, 2022 9:12 AM

Field	Value
Description	This report is designed to monitor data quality by locating HUD required project descriptor data which is missing. This data is crucial to CoC Program Applications, APRs – CoC and ... S, and for HUD Sys em Performance Measures.
Created On	Apr 25, 2022 8:57 AM
Document Type	Microsoft Excel
Owner	hmisnceh_live:kwiseman
Keyword	None

Scheduled Reports: Instances

Schedule Instances

Instance Time: Status: Type: Title:

Instances (5)

<input type="checkbox"/>	Title	Type	Status	Instance Time	Scheduled By	Subscription	
<input type="checkbox"/>	0227 - Project Descriptor Elements Dat...	Microsoft Excel	✓ Success	Apr 21, 2022 8:35 AM	hmisncceh_live:kwiseman		⋮
<input type="checkbox"/>	0227 - Project Descriptor Elements Dat...	Microsoft Excel	✓ Success	Apr 21, 2022 7:52 AM	hmisncceh_live:kwiseman		
<input type="checkbox"/>	0227 - Project Descriptor Elements Dat...	Microsoft Excel	✓ Success	Apr 21, 2022 7:51 AM	hmisncceh_live:kwiseman		
<input type="checkbox"/>	Katie Test #1	Web Intelligence	✓ Success	Apr 18, 2022 4:09 PM	hmisncceh_live:kwiseman		
<input type="checkbox"/>	Schedule to Personal Inbox Test #1	Microsoft Excel	✓ Success	Apr 15, 2022 9:12 AM	hmisncceh_live:kwiseman		

View
Run Now
Reschedule
Details
Delete

Use the tool bar items to narrow your listed reports down.
Instance time is listed as DD.MM.YY

Once the desired report is found, click the additional options icon.

Select View to download to the computer

INSTANCES

60 days

BI INBOX

**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.



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.

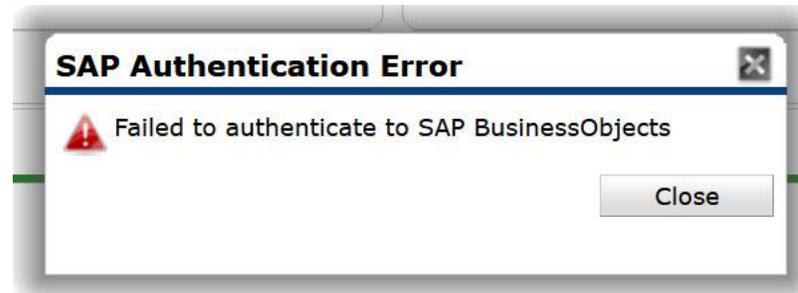
Basically, data you enter or edit in HMIS today will be unavailable for BusinessObjects reporting until tomorrow.

The Warehouse Refresh date can be found here. Simply click Folders followed by Public Folder. Look for "hmisncceh_live_folder" from the screen on the right to see the date stamp under the "Last Updated" column

Title	Favorites	Folder	Last Updated
Available Reports and Templates			Dec 29, 2021 4:21 PM
Available WellSky Resources			Dec 29, 2021 4:22 PM
hmisncceh_live_folder		Public Site Folder for hmisncceh_live	Apr 25, 2022 1:50 AM

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.*

Http Status 500-Internal Server Error

Internal Server Error

- Search the [SAP BusinessObjects Knowledge Base Articles](#) for similar cases.
- Contact with [SAP BusinessObjects Customer Support](#).

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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