

# BusinessObjects 101: the basics

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



**NC COALITION** to  
**HOMELESSNESS** end



**Welcome to BusinessObjects**

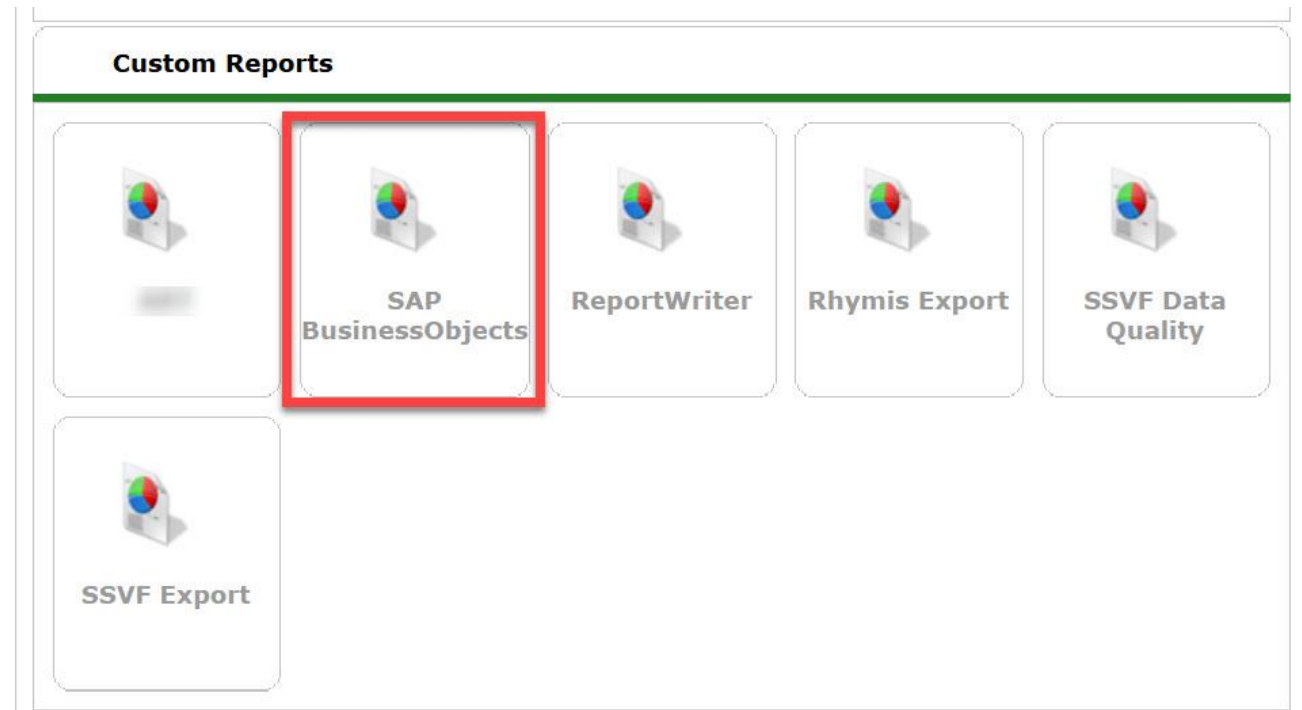
# Accessing BusinessObjects

There are two ways to open BusinessObjects:

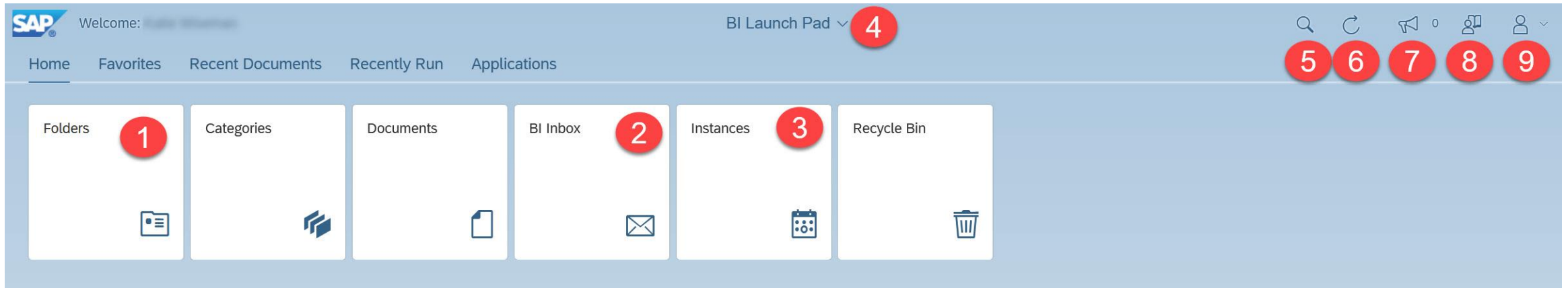
1. Click on the **Connection to BusinessObjects** link found in the upper right corner of HMIS (below Back Date Mode)

...OR

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 shows the SAP Fiori interface. At the top, there is a navigation bar with a 'Back' button (circled in red and labeled 3), a 'Home' button (circled in red and labeled 3), the SAP logo, and a 'Welcome' message. The breadcrumb trail is highlighted in red and labeled 2: Public Folders / hmisnceh\_live\_folder / HMIS@NCCEH Gallery / . The left sidebar shows the folder structure with 'Public Folders' and 'hmisnceh\_live\_folder' highlighted in yellow and labeled 1. The main content area displays a list of reports, with 'A009 - Destination Client Level Audit Re...' highlighted in yellow.

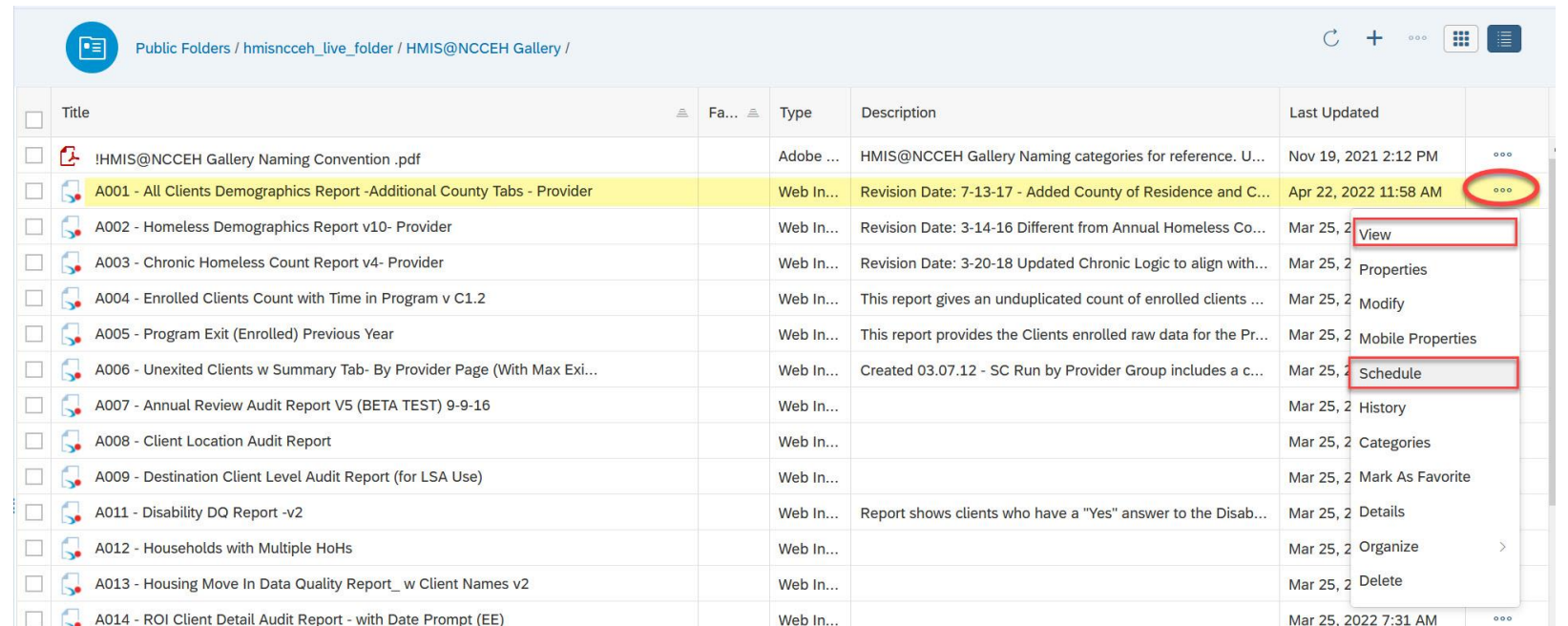
<input type="checkbox"/>	Title	Favorites
<input type="checkbox"/>	!HMIS@NCCEH Gallery Naming Conven...	
<input type="checkbox"/>	A001 - All Clients Demographics Report ...	
<input type="checkbox"/>	A002 - Homeless Demographics Report ...	
<input type="checkbox"/>	A003 - Chronic Homeless Count Report ...	
<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

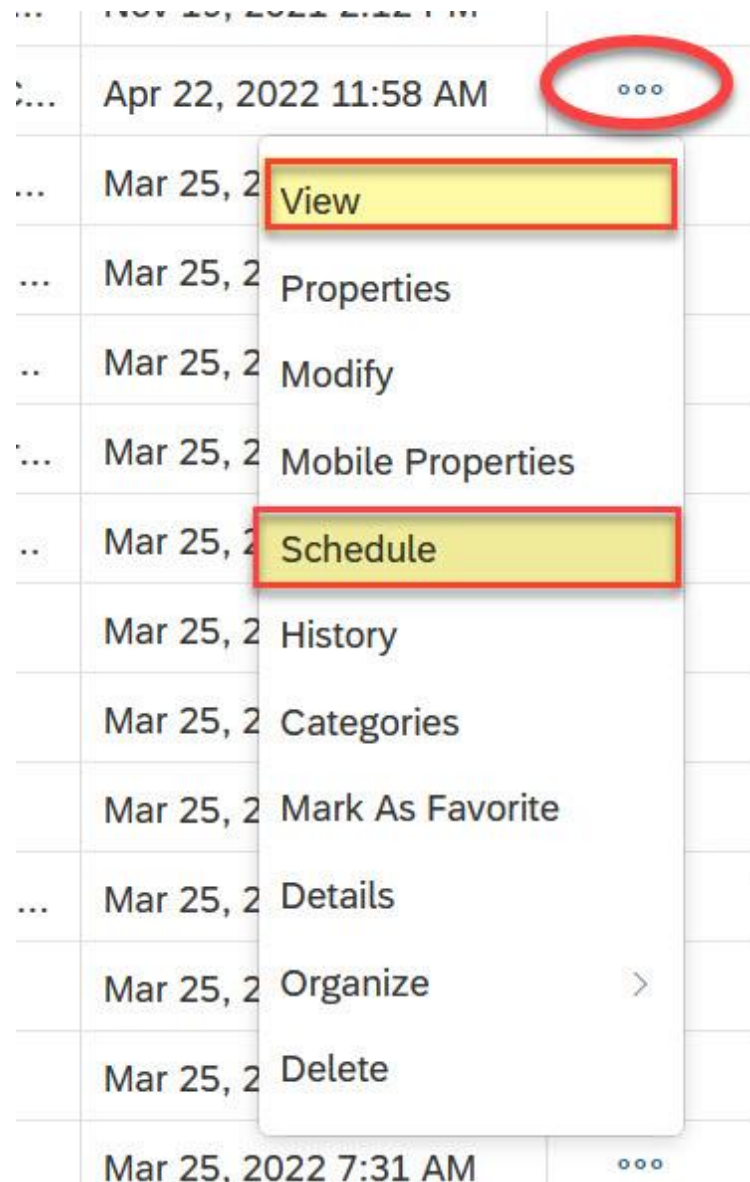


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## There are two options to run reports:

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 displays the SAP report interface. At the top, the header shows the SAP logo, the user name 'Welcome: Katie Wiseman', and the report title 'A013 - Housing Move In Data Quality R...'. Below the header is a navigation bar with 'File', 'Data', and 'Analyze' tabs. The 'File' tab is active, showing icons for download (E), refresh (D), and filter. Below the navigation bar, there are three tabs: 'HoH List', 'Client Detail', and 'Prompts'. The 'HoH List' tab is selected and highlighted with a red box (B). Below the tabs, a data table is visible 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 pagination control showing 'Go To 1 of 1' (C) and various navigation icons.

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

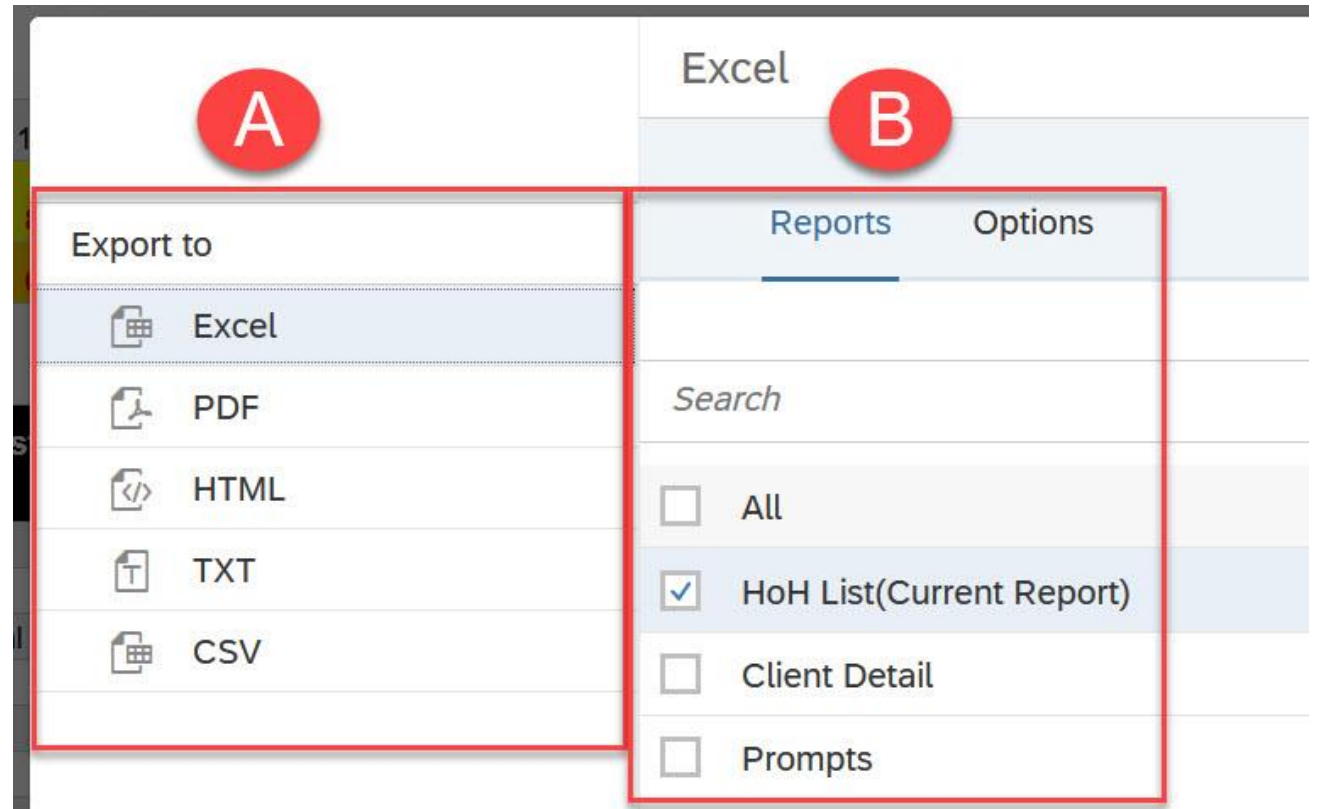
- A. Report Title
- B. Tabs
- C. Page Navigation within each tab
- D. Refresh to select new prompts
- E. Additional Options to download and print the report

# View Mode: Exports

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

1. Excel - Reports
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!



# 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-Reports 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





# Accessing Schedule Reports

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

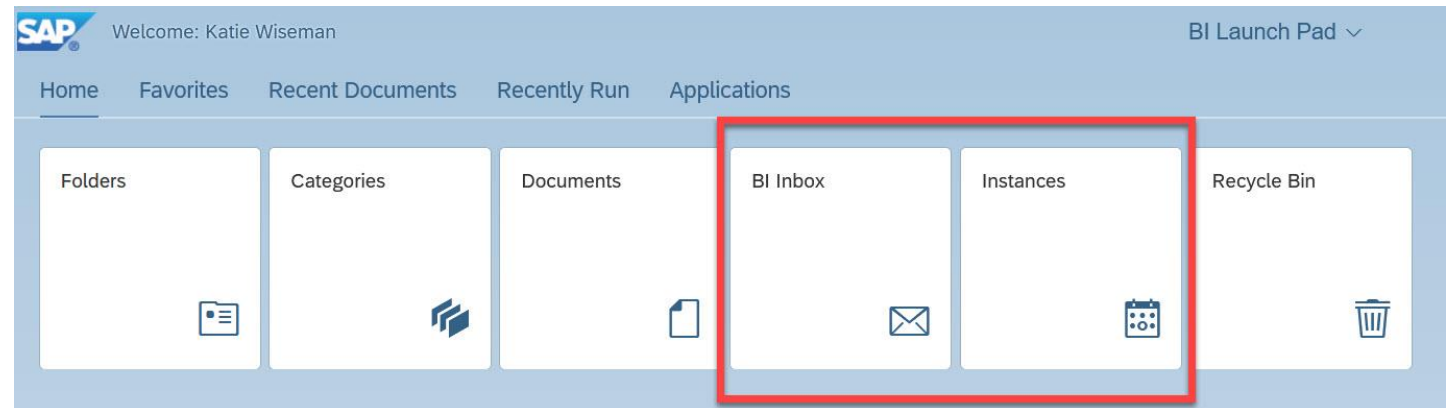
## A. BI Inbox

- 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 item highlighted. On the right, the details for 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 Title	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

General Info	
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
Separator :	

# 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	hmisnceh_live:kwiseman		⋮
<input type="checkbox"/>	0227 - Project Descriptor Elements Dat...	Microsoft Excel	✓ Success	Apr 21, 2022 7:52 AM	hmisnceh_live:kwiseman		
<input type="checkbox"/>	0227 - Project Descriptor Elements Dat...	Microsoft Excel	✓ Success	Apr 21, 2022 7:51 AM	hmisnceh_live:kwiseman		
<input type="checkbox"/>	Katie Test #1	Web Intelligence	✓ Success	Apr 18, 2022 4:09 PM	hmisnceh_live:kwiseman		
<input type="checkbox"/>	Schedule to Personal Inbox Test #1	Microsoft Excel	✓ Success	Apr 15, 2022 9:12 AM	hmisnceh_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.



# 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](mailto: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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