

# Instructions for Scheduling SAP Business Objects (SAP BO) Reports

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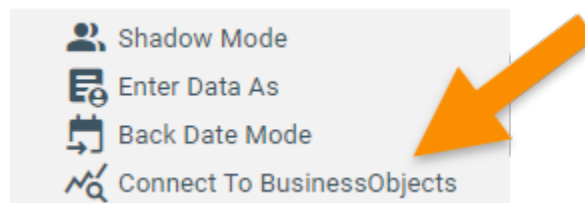
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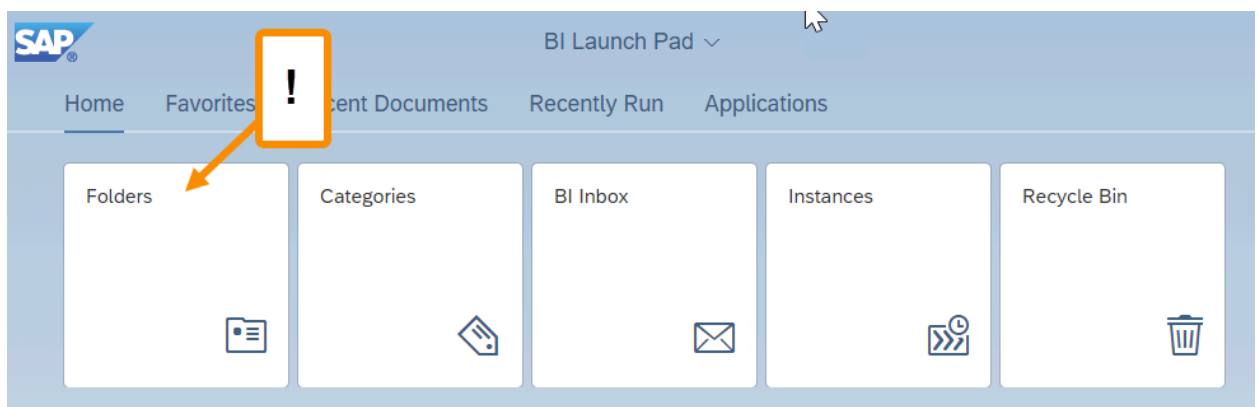
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## Opening SAP BO

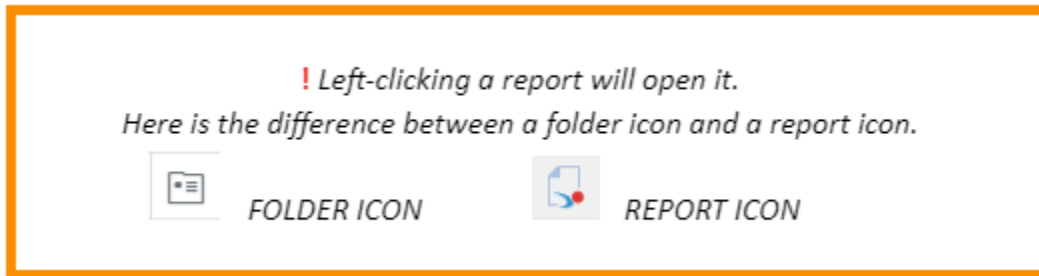
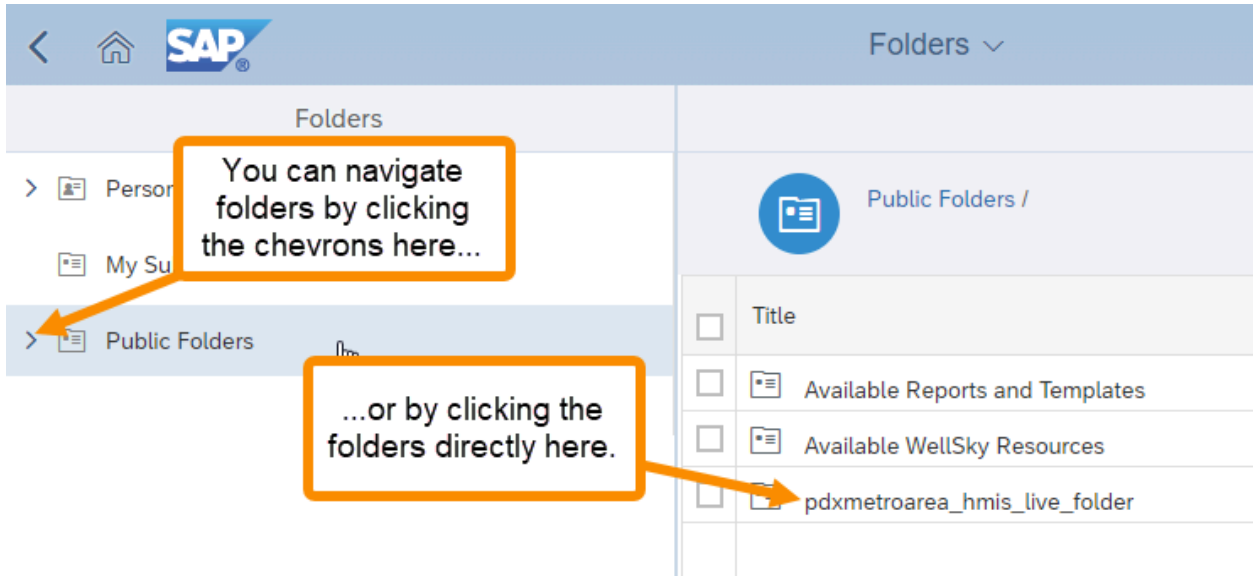
- Open SAP BO by clicking the “Connect to BusinessObjects” link in the upper right corner of HMIS. The tool will open in a new browser tab.



- Select the **Folders** box to view available reports.



- Most reports are available in the folder at the following path:  
Public Folders > pdxmetroarea\_hmis\_live\_folder.
- Navigate folders by either double-clicking the folder on the right side of the screen, or by clicking the chevrons on the left navigation bar.

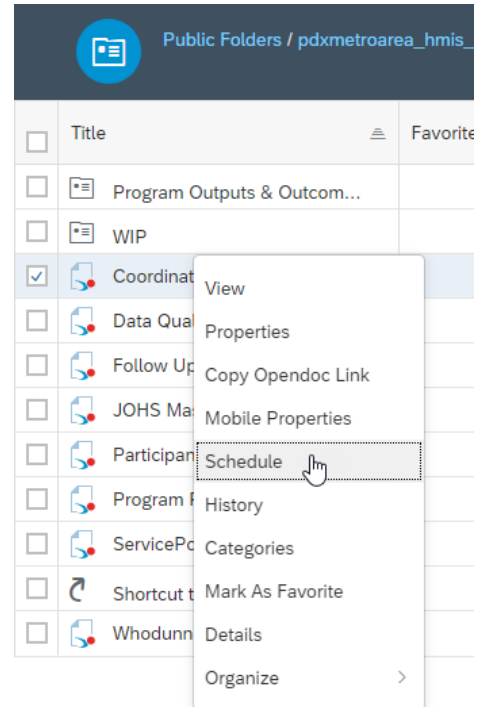


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# Schedule a Report

- Once you've navigated to your desired report, **right-click it**. Then select **Schedule**.

The next page opens onto the General tab of the report Scheduler.



## General Tab

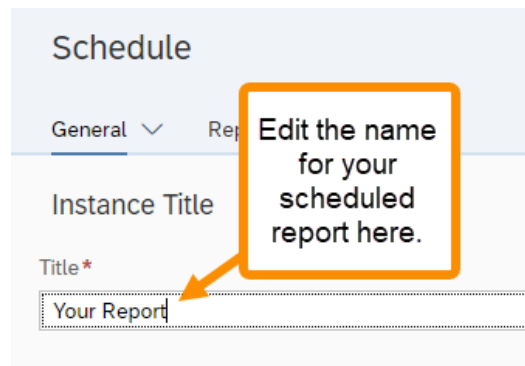
- On the General tab, **edit the report name** as needed.

We suggest adding the report period and the date of the report to the report's name.

For example, if you're scheduling a Program Performance v2.0 report, the report title could be:

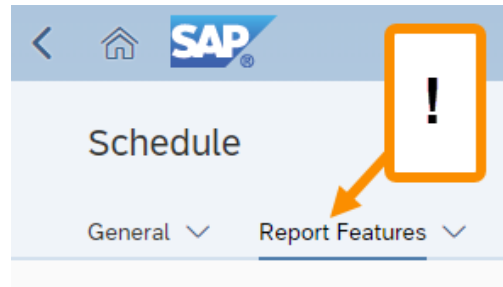
"Program Performance v2.0\_FY23\_as of 24-07-01."

- Note: You can also schedule a report to run multiple times under the Recurrence sub-header. This section will be covered in a future version of this handbook. For now, skip to the Report Features tab.

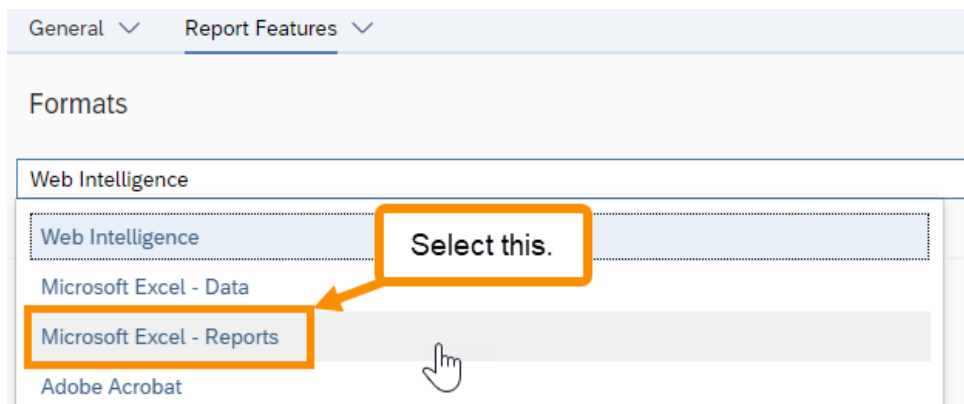


## Report Features Tab

- Next, click the **Report Features** tab.



- Under the “Formats” header, change the selection from *Web Intelligence* to *Excel - Reports*.



- Next, under the “Prompts” header and on the far-right side, click **Edit Prompt Values**.

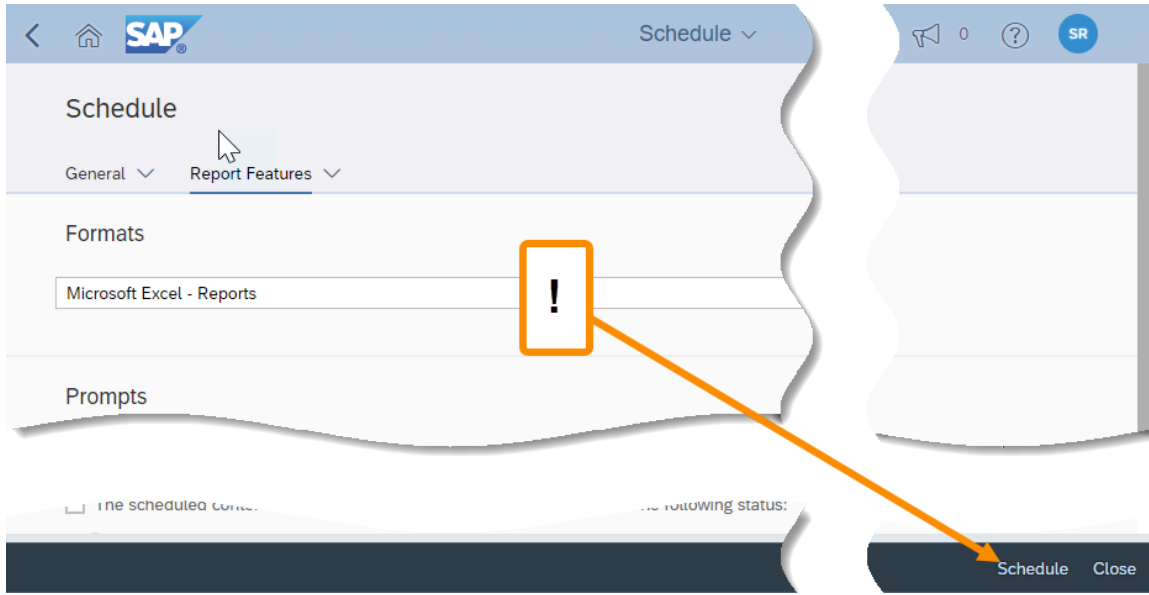


*It may take a minute for the next screen to appear.*

- **Select your prompts** on the Prompts page as per normal. Then **click Apply** in the lower right-hand corner.

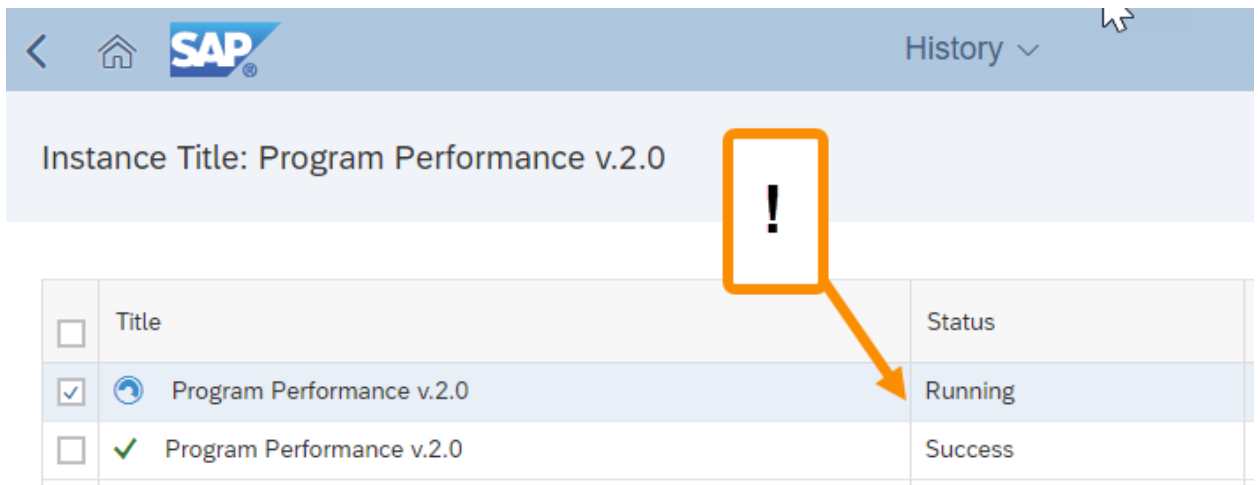
You will return to the Report Features tab.

- Next, **click Schedule** in the lower right corner.



You will then go to the report's History page.

- On the History page, you will see a report-specific history of reports you've scheduled. The Status column will indicate one of the following statuses: Pending, Running, Success, or Failed.



When the Status says “Success”, you can download your report.

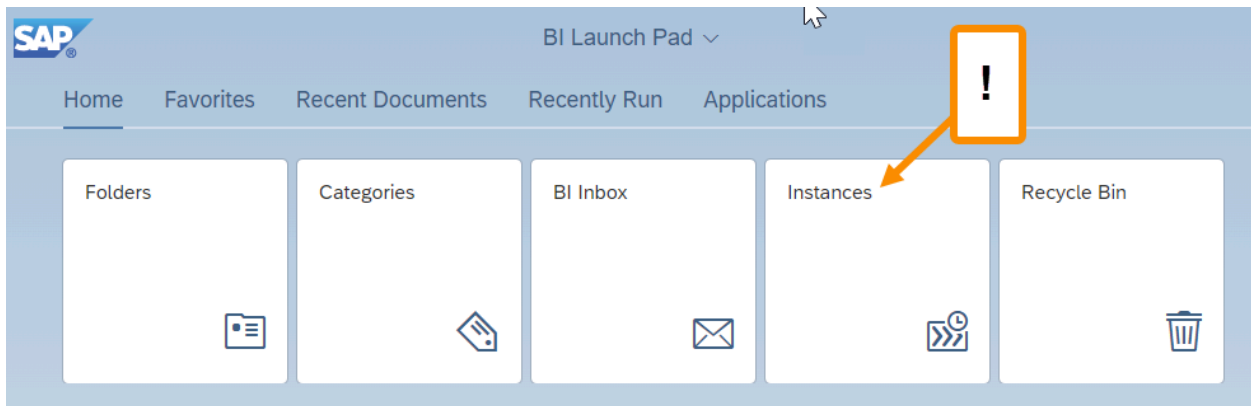
- You may want to return to SAP BO later to retrieve your report.
  - If so, you can **exit SAP BO** and/or HMIS now.  
**Read the next Report Retrieval section** to learn how to retrieve your report.

## Report Retrieval

You can access your scheduled reports in two ways.

### Option 1: Instances

- From the home screen in SAP BO, **click Instances**.



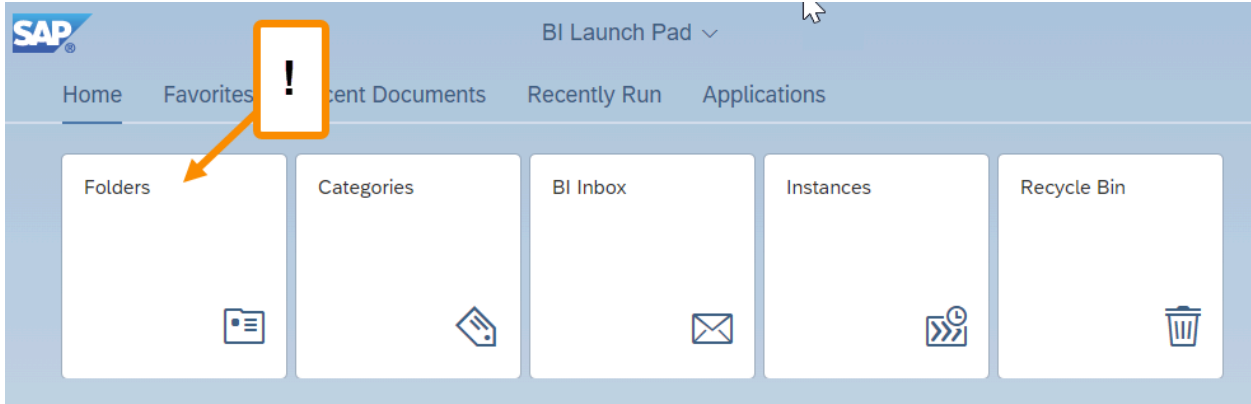
- Next, **left-click the report you want to download**. Your Excel report will download to the Downloads folder on your computer.

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## Option 2: Report History

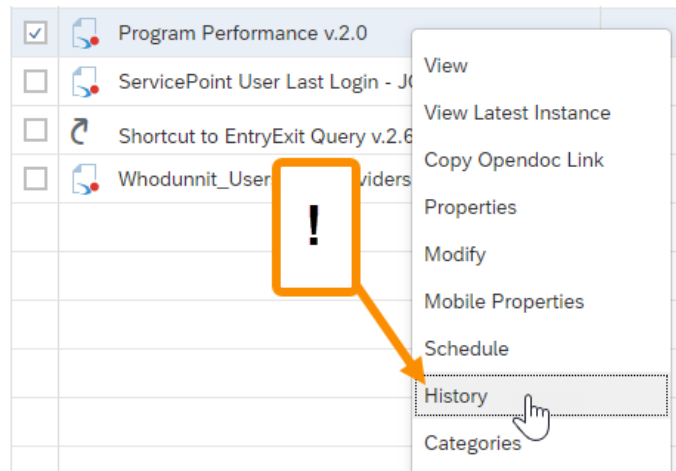
You can also access your schedule reports from the report's History.

- From the SAP BO home screen, click Folders.



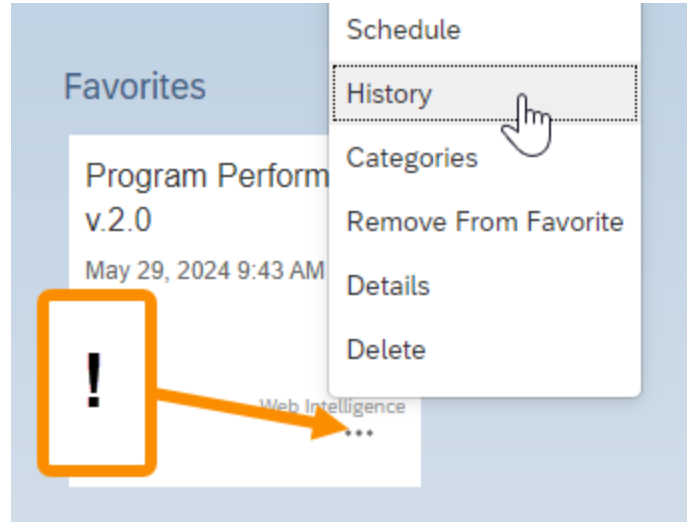
- Navigate to your report, following the instructions at the top of this document.

- Right-click anywhere on the report. Then, click History on the popup.



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- Alternatively, if you have your report favorited, you can click the ellipsis on the favorited report, then click History .



- On the History page, the most recent instance will show up at the top of the list. Note the date and time of each instance in the Instance Time column to help you select, if needed.
- **Left-click the report instance** you want. The report will download to the Downloads folder on your computer.
- Navigate to your computer and open the report instance.

*~ End of Instructions ~*

*Please send any questions about this process or feedback about this document to  
hmishelp@multco.us.*