

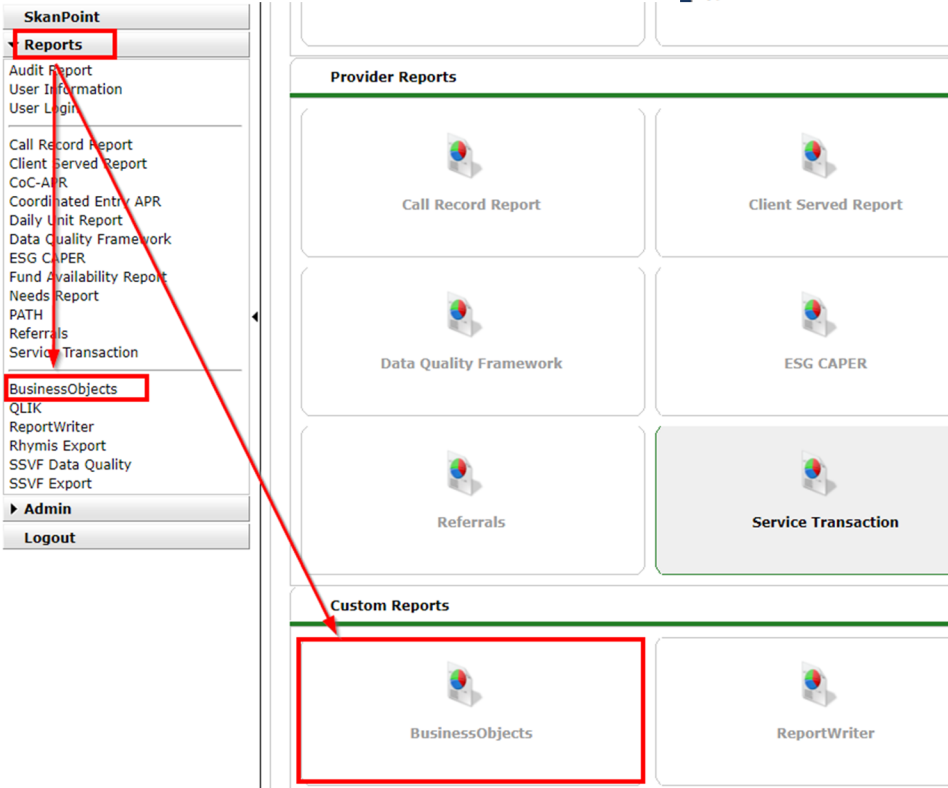
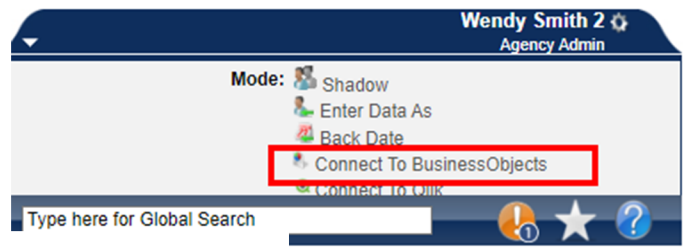
Quick Guide to SAP Business Objects 4.3

Accessing BusinessObjects (“BO”).

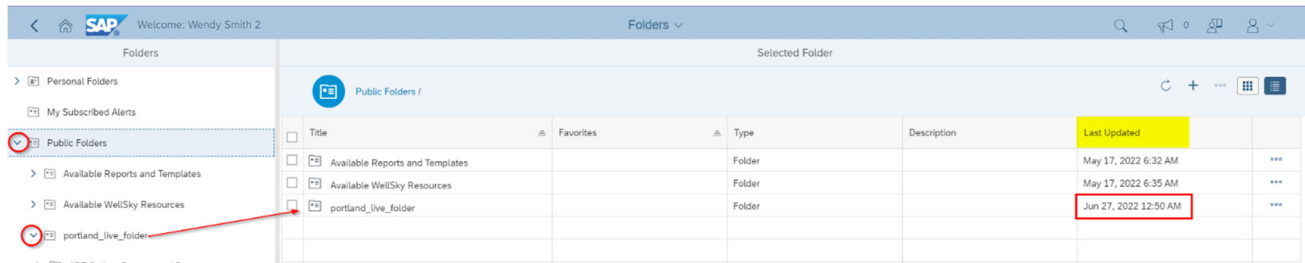
There are two access points

In the upper right of your screen

Or by navigating to the Reports menu on Left of your screen



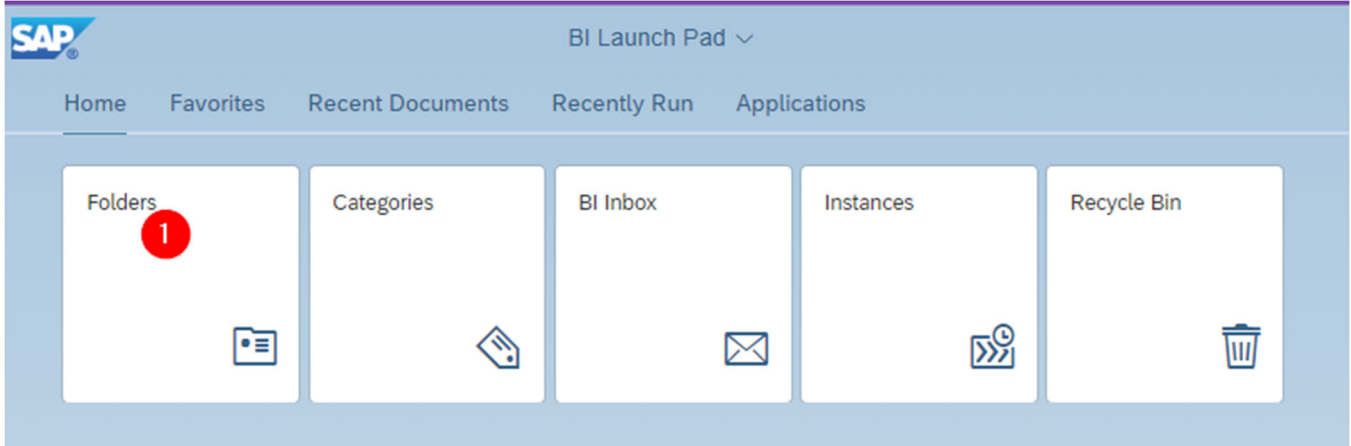
Just like ART, **BO** is a delayed reporting tool. You can review when the last “refresh” or “rebuild” occurred:



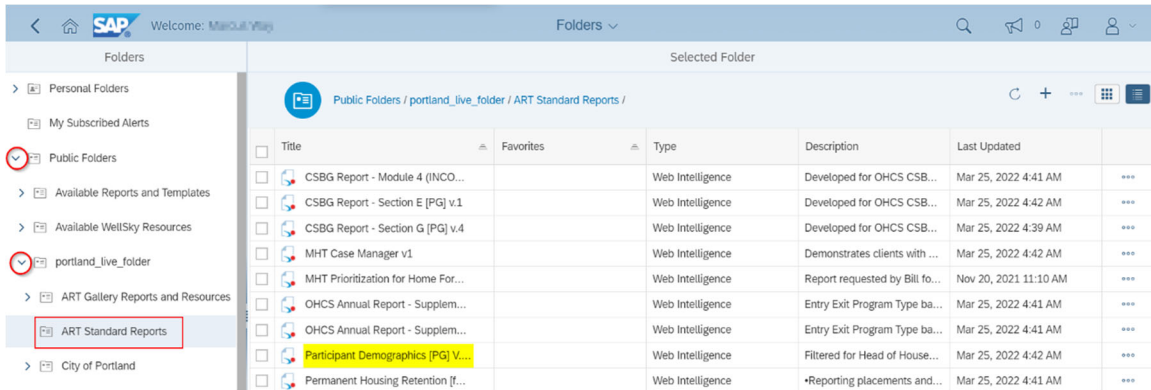
Quick Guide to SAP Business Objects 4.3

And just like ART, SAP BO will include all our reports in their folder, but maneuvering SAP BO is a bit different.

Your home screen will look something like:



When you click on Folders (**1**)
You are presented with the list of folders like:



Just as in ART you should navigate to the appropriate report via the chevrons (>); opening folders as needed

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Once you've located the appropriate report click on the **Title/Name** of report. Wait for the prompt screen to pop-up

Things start to look very different.

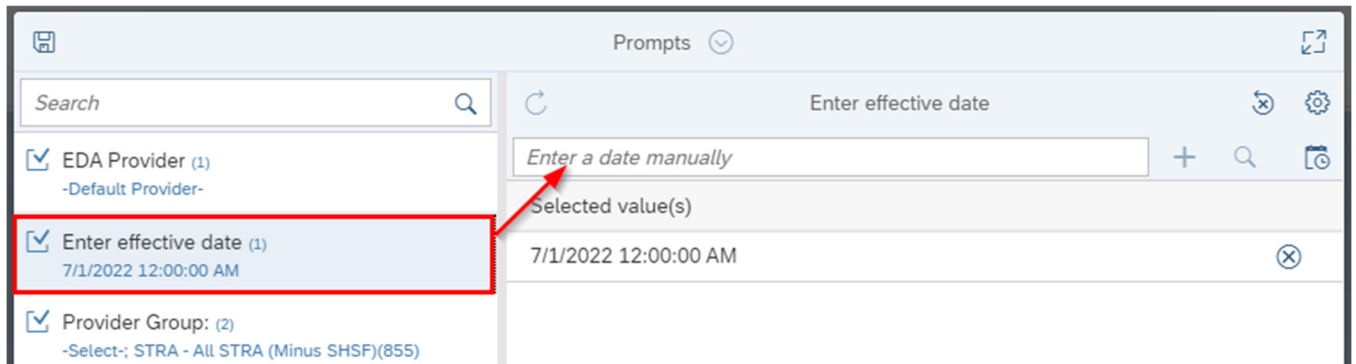
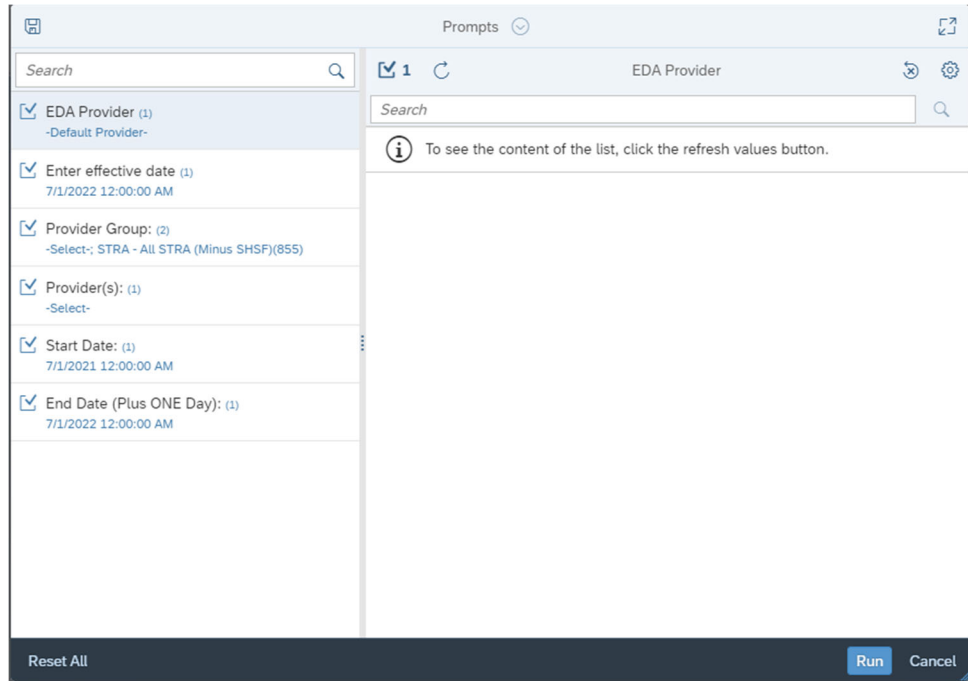
But the basic prompt guidelines remain the same.

Complete all prompts as needed.

- **EDA Provider** is generally always left as the - Default Provider –
- **Effective Date** is generally always the same as the latest end date prompt of the report.
- **End Date** is generally always a “Plus 1 Day”, meaning if you want your report for a calendar year (1/1/2022-12/31/2022), you should add 1 day to the end (12/31/2022) thus the prompt response would be 1/1/2023.

Work with your contract manager, local administrator, or trainer for guidance on report specific prompts.

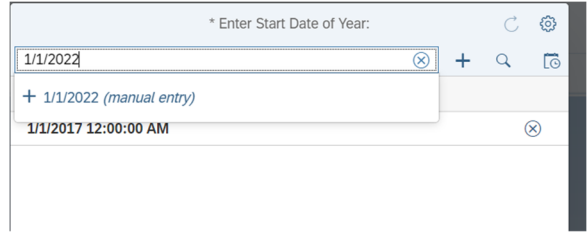
If you need to update a prompt click on the line,



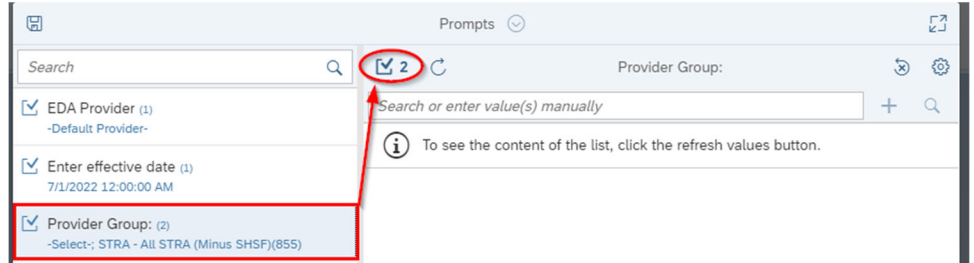
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Update the field with a “new Date” and hit Enter then OK

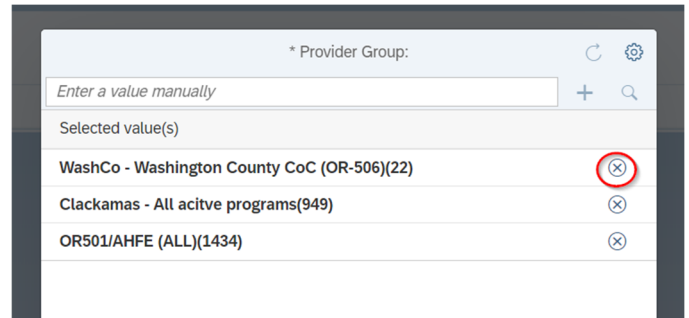
(Or use this process to search for Values, hit enter and add values as needed.)



Confirm existing prompt responses - displaying current answers by clicking on the Check Box



If you need to remove values, click on the “X”

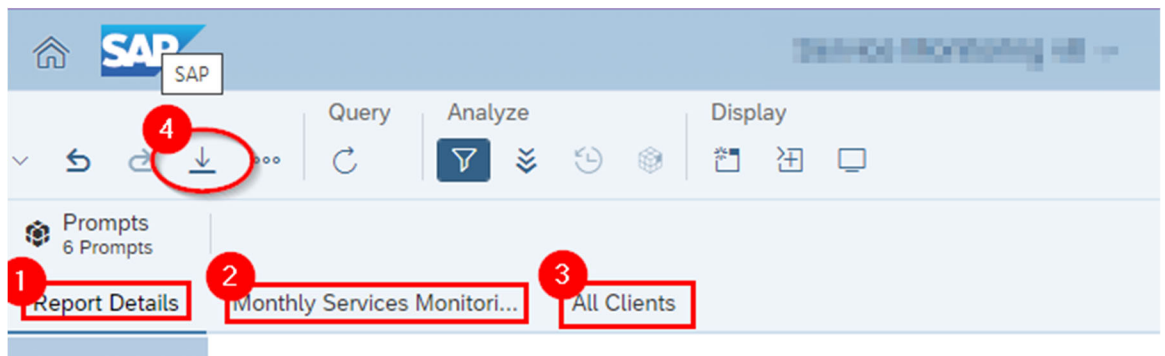


Once you’ve updated all prompts, then Click on Run



And Wait for the report to run...

Maneuver through the report by Tabs at the top of screen (see 1 2 3)



Ready to Download/Save the Report?

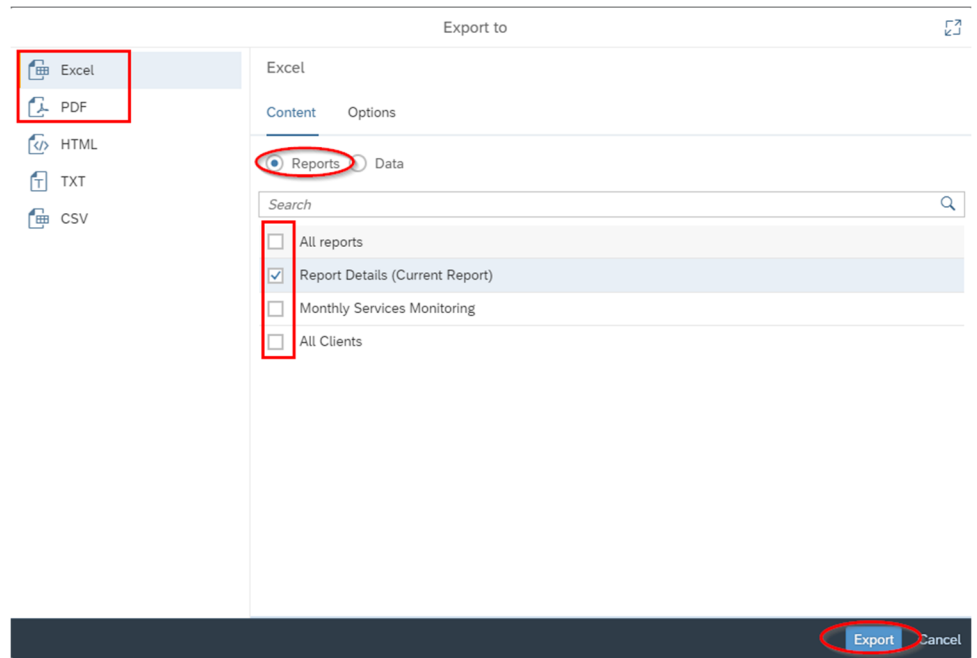
You will Save by Exporting at 4

Quick Guide to SAP Business Objects 4.3

Once you clicked on the “export button”

4

Choose output type, usually either Excel or PDF
Identify Content Type – Reports (not data)
Choose which report tabs you want to download/save
Click on Export
The file is saved on your workstation wherever your downloads are saved.



Do you need to **Re-Run** the report?
Click on the Refresh Arrow and Repeat the process



**This is NOT a complete training guide,
but it should help you maneuver your way around BO.**

Reach out to your **local administrator** or **trainer** for more guidance if needed.

PHB HMIS/ServicePoint Administrator Contact:
Wendy Smith 503-823-2386 wendy.smith@portlandoregon.gov

Quick Guide to SAP Business Objects 4.3

Shall we schedule a report?

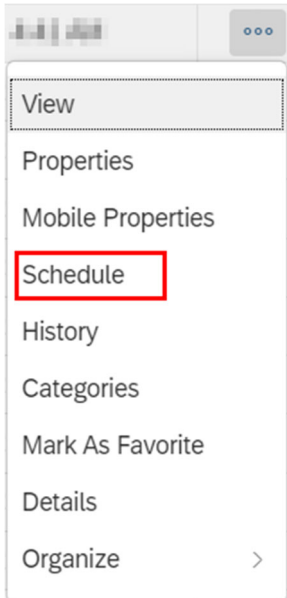
The process is similar. Find the report you intend to schedule, maneuvering SAP BO folders.

Title	Favorites	Type	Description	Last Updated	
0252 - Data Completeness Repo...		Web Intelligence	Do you want to see your sy...	Mar 25, 2022 4:40 AM	...
0254 - Shelter - History, Overlap,...		Web Intelligence	This report will display all o...	Mar 25, 2022 4:41 AM	...
0260 - HUD CoC APR Data Quali...		Web Intelligence	This report is a HUD CoC A...	Mar 25, 2022 4:41 AM	...
0263 - RHY Data Completeness-...		Web Intelligence	This report was designed t...	Mar 25, 2022 4:41 AM	...
0264 - Coordinated Entry Assess...		Web Intelligence	This report checks data qu...	Mar 25, 2022 4:41 AM	...
0265 - Coordinated Entry Event ...		Web Intelligence	This report checks data qu...	Mar 25, 2022 4:41 AM	...
0315 - Program Daily Census - v4		Web Intelligence	This report is designed to p...	Mar 25, 2022 4:41 AM	...
0322 - Project Demographics - v14		Web Intelligence	This ART report provides d...	Mar 25, 2022 4:40 AM	...

Then click on the 3 dots **1** to open the actions for the row/report.

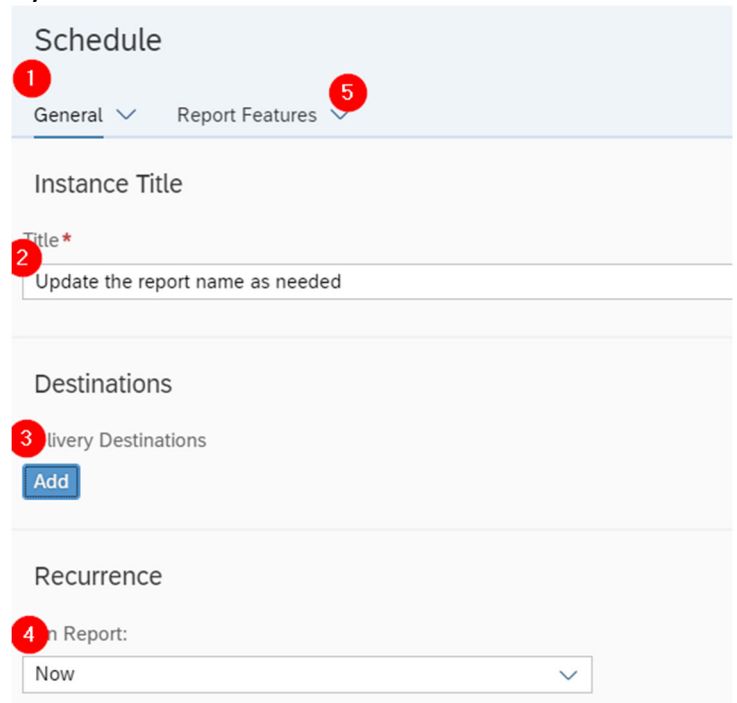
Now Choose Schedule

Now things start to look different:



- 1** General Tab is where you
- 2** Name
- 3** Add Recipient
- 4** Set frequency
- 5** Report Features to

“continue the process”



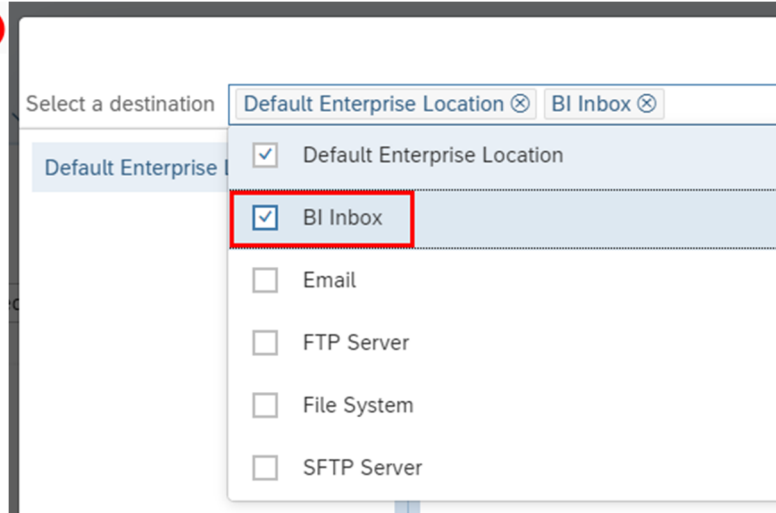
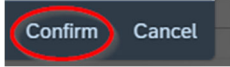
Quick Guide to SAP Business Objects 4.3

Once you've Named your Report **2**

At **3** Destinations click on Add

And Check the **BI Inbox**, this is CRITICAL!

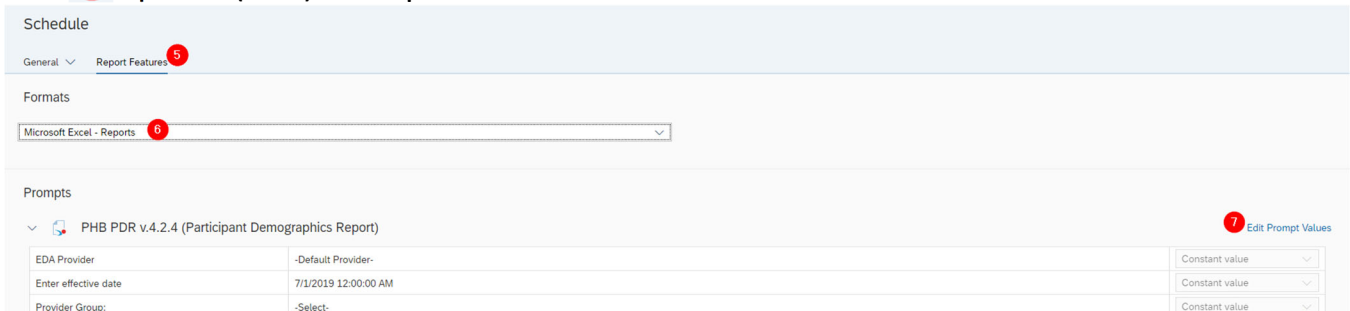
Then Confirm (lower right)



Now complete the Recurrence or move on to **5** Report Features

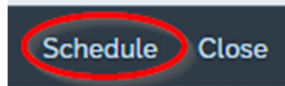
We set **6** Format (it is recommended you use Microsoft Excel – Reports)

and **7** Update (Edit) Prompts



The prompt pop-up might be slow to pop-up, please be patience.

Once you've updated all Prompts and are ready to 'go' – click on Schedule in the lower right corner of the screen.



To Return "Home" use the house button at top left.

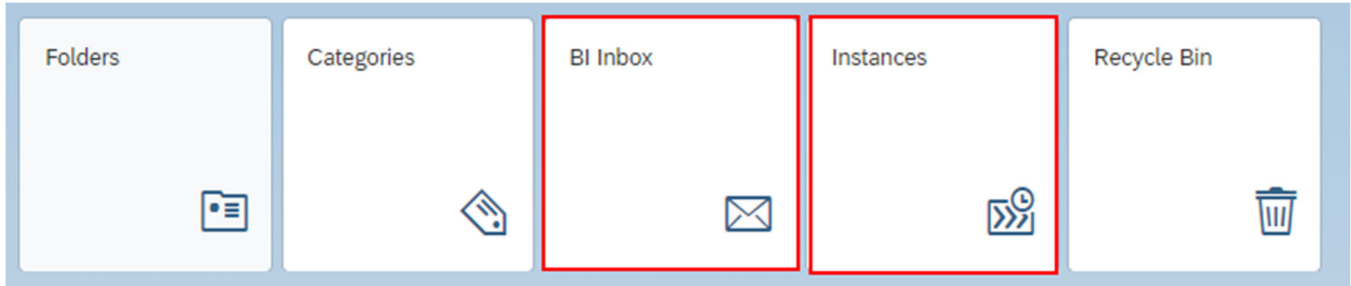
Quick Guide to SAP Business Objects 4.3

Where will you find your completed scheduled reports?

BI Inbox

Where will you find the list and status of your scheduled reports?

Instances



Instances is like the list of schedule report at the bottom of the ART screen

Schedule Instances

Instance Time: 05.05.2022 - 06.05.2022 Status: Select Instance Status Type: Select Document Type Title: Enter Document Title Go

Instances (34)

Title	Type	Status	Instance Time	Scheduled By	Subscription
0121 - User Contact Information - v1...	Web Intelligence	Pending	May 6, 2022 7:11 AM	portland_live:wendys	...
ARP Reporting v04072022	Web Intelligence	Running	May 6, 2022 7:11 AM	portland_live:wendys	...
Wendy demo	Microsoft Excel	Success	May 6, 2022 6:21 AM	portland_live:wendys	...
ERAP RA COVID Response Report 0...	Microsoft Excel	Success	May 6, 2022 6:07 AM	portland_live:wendys	...
Wendy demo	Microsoft Excel	Success	May 6, 2022 5:21 AM	portland_live:wendys	...

And BI Inbox is like your ART inbox

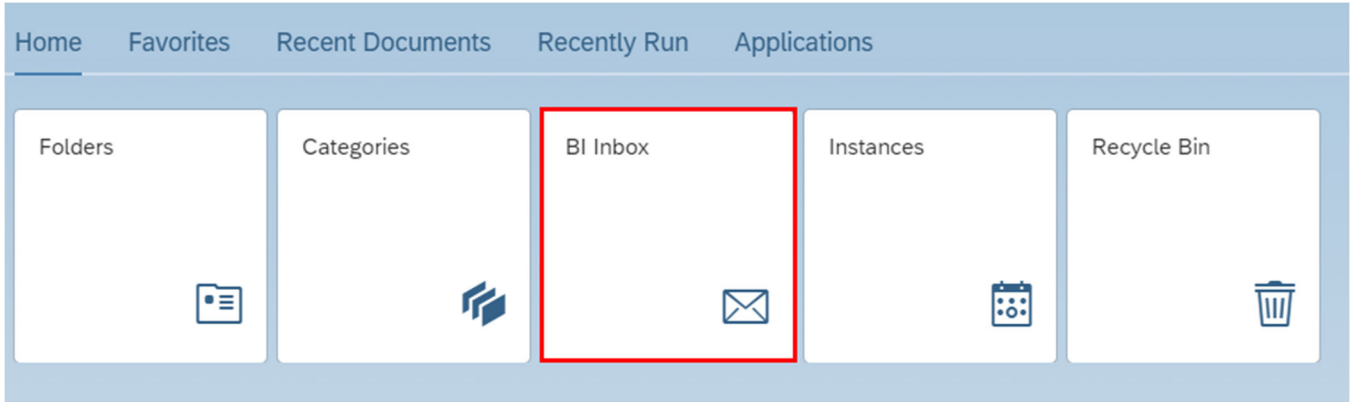
List of Run Reports in left
With Document/Report
details. to right.

The image shows the SAP Business Objects BI Inbox interface. The top bar displays the user's name, 'Wendy Smith'. Below the bar, there are tabs for 'All', 'Alerts', and 'Documents'. A search bar is present. The main content area shows a list of reports, with two items highlighted in a red box: 'ARP Reporting v04072022 : 1583011' and 'ERAP RA COVID Response Report 0506202...'. To the right of the list, the details for the selected report are shown, including 'General Info' such as Description, Created On, Document Type, Owner, Keyword, and Sender.

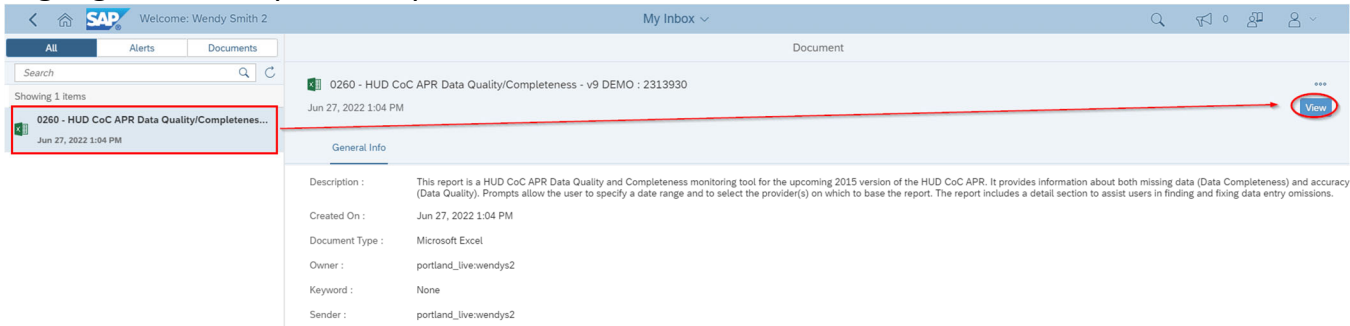
PHB HMIS/ServicePoint Administrator Contact:
Wendy Smith 503-823-2386 wendy.smith@portlandoregon.gov

Quick Guide to SAP Business Objects 4.3

Let's open that scheduled report
Navigate to your BI Inbox



Highlight the completed report and click on View



The file is saved on your workstation wherever your downloads are saved.

PHB HMIS/ServicePoint Administrator Contact:

Wendy Smith

503-823-2386

wendy.smith@portlandoregon.gov

Quick Guide to SAP Business Objects 4.3

Did you notice Favorites?

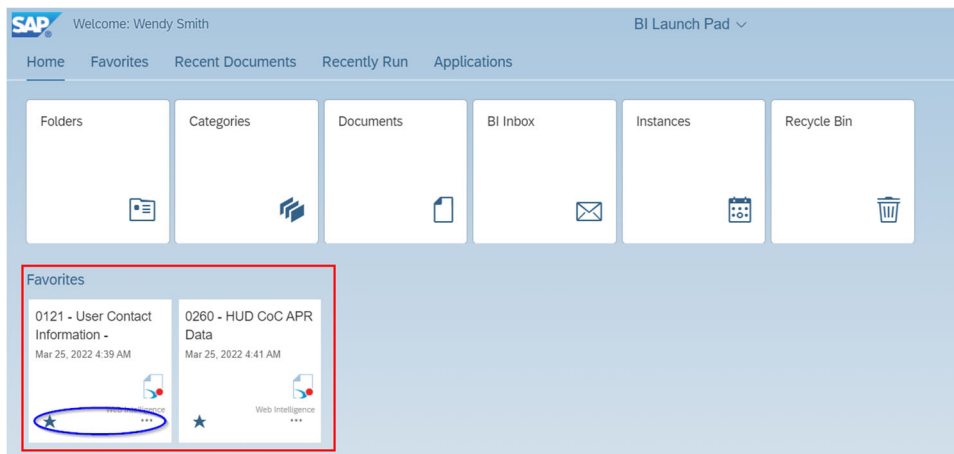
Yes you can set frequently used reports as a favorite.



Those ... (three dots) to the right

or beneath a report includes an option to “Mark as Favorite”

0213 - Data Elements-Quality at Reco...	Web Intelligence	Do you want to see your system...	Mar 25, 2022 4:42 AM	...
0216 - Unexited Clients Exceeding Ma...	Web Intelligence	This report is designed to monit...	Nov 20, 2021 11:1	View
0220 - Data Incongruity Locator - Age...	Web Intelligence	This data quality report assists u...	Mar 25, 2022 4:40	Properties
0222 - Workflow Elements by Client - v2	Web Intelligence	This ART report is designed to ...	Mar 25, 2022 4:41	Mobile Properties
0227 - Project Descriptor Elements Da...	Web Intelligence	This report is designed to monit...	Mar 25, 2022 4:41	Schedule
0243 - Data Completeness Report Car...	Web Intelligence	This report is a data completene...	Mar 25, 2022 4:42	History
0252 - Data Completeness Report Car...	Web Intelligence	Do you want to see your system...	Mar 25, 2022 4:40	Categories
0254 - Shelter - History, Overlap, and ...	Web Intelligence	This report will display all of a cl...	Mar 25, 2022 4:41	Mark As Favorite
0260 - HUD CoC APR Data Quality/Co...	Web Intelligence	This report is a HUD CoC APR D...	Mar 25, 2022 4:41	Details



Unfavorite your report by clicking on the Star ★