



This document provides an overview of BusinessObjects and has details for running a report in the system.

Important Note: *This document is up to date as of 7/11/2022, and as of this date BusinessObjects is not fully operational. This document will be updated as the system is updated.* **Introduction**

BusinessObjects is a tool that utilizes information from ServicePoint to create reports. BusinessObjects reports can be used to manage HMIS data, ensure data quality and performance, and analyze outcomes. They are also available to assist with the submission of state and federal mandated requirements. The maintenance of each report varies by the report creator and additional programming details can be found by contacting the owner.

Information from ServicePoint is uploaded into BusinessObjects once a day in the evening. The **Last Warehouse Build** is located here: Folders > Public Folders > ___live_folder in the “Last Updated” Column. Here you will see details of the day and time (MST) data was last uploaded into BusinessObjects.

	Title	Favorites	Type	Description	Last Updated	
<input type="checkbox"/>	Available Reports and Templates		Folder		May 17, 2022 9:32 AM	...
<input type="checkbox"/>	Available WellSky Resources		Folder		May 17, 2022 9:35 AM	...
<input type="checkbox"/>	chin_live_folder		Folder		Jun 24, 2022 1:11 AM	...
<input type="checkbox"/>	michigan_live_folder		Folder		Jun 24, 2022 4:56 AM	...

Individuals must have an ART license (*license name is not changing to BusinessObjects*) to access the reports. Details for obtaining a license are below.

Click this [link](#) for the Business Objects Training video.

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A. Accessing BusinessObjects

BusinessObjects can be accessed in three different locations on ServicePoint. The first is on the top right on the ServicePoint Screen, the second is under the canned Reports tab, the third is by clicking on the Reports tab and scrolling to custom reports> SAP BusinessObjects.

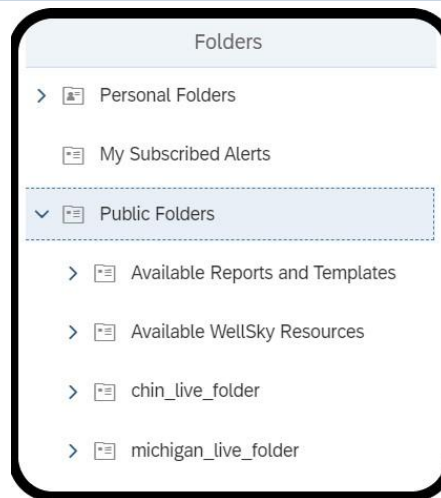
The screenshot displays the Michigan Statewide HMIS Reports > Report Dashboard. The top navigation bar includes the Michigan Statewide HMIS logo, the date June 08, 2022, and a 'Mode' dropdown menu with options: Shadow, Back Date, Connect To, and Connect To Qlik. A red arrow points to the 'Connect To Qlik' option. The main content area is titled 'Report Dashboard' and features a search bar. The left sidebar contains a navigation menu with categories: Last Viewed, Favorites, Home, ClientPoint, CallPoint, ResourcePoint, FundManager, ShelterPoint, ActivityPoint, SkanPoint, Reports (highlighted with a red box), Admin, and Logout. Under the 'Reports' category, a list of reports is shown, with 'SAP BusinessObjects' highlighted by a red arrow. The main dashboard area is divided into sections: Audit Reports (Audit Access Report, Audit Report, User Information, User Login), Provider Reports (Call Record Report, Client Served Report, CoC-APR, Coordinated Entry APR, Daily Unit Report, Data Quality Framework, Duplicate Client Report, ESG CAPER, Fund Availability Report, Fund Usage Report, My Managed Funds Report, Needs Report, PATH, Referrals, Service Transaction), System Performance Measures (System Performance Measures), and Custom Reports (ART, SAP BusinessObjects, ReportWriter, LSA Export, Rhymis Export). A red arrow points to the 'SAP BusinessObjects' tile in the Custom Reports section.

Important Note: If you need to run a report in a specific EDA, you must enter into that EDA in CommunityServices (ServicePoint) **before** navigating to BusinessObjects.

B. BusinessObjects Homepage

1. Folders

This is where reports and resources are located in BusinessObjects.



Available Reports and Templates

This section of BusinessObjects is managed by WellSky and utilized as part of the process for building reports in the system. DO NOT use any Unmapped Reports.

ART Gallery Report Manuals (Name is *not* changing to BusinessObjects)

ART Gallery Report Manuals are available in BusinessObjects under Available Reports and Templates. The manuals are created by WellSky and clarify how to run the report and how the report pulls data. Manuals are available for specific BusinessObjects reports and generally include Report Instructions and Prompts, Description and Layout, Input Controls, Alerters, Technical Information, Mapping Objects, and Revision History.

Available WellSky Resources & Diagnostic Test Folder The materials found in this folder should not be used.

Public Folder

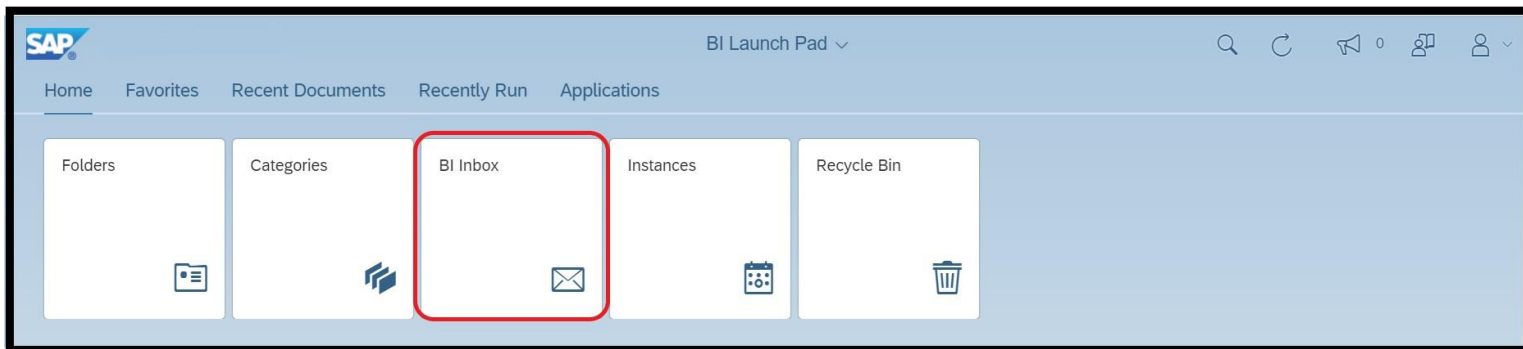
Several reports are located within sub-folders in the Public Folder.

ART Gallery Reports and Resources (Name is *not* changing to BusinessObjects)

The most recent version of BusinessObjects Reports created by WellSky are in this folder by numeric order.

2. BI Inbox

The Inbox in BusinessObjects lists out reports that have completed after being scheduled. The reports are listed in the order in which they completed, with the most recent at the top. Reports will stay in the inbox until they are deleted. Reports should be deleted from the inbox periodically to reduce loading and processing time. To delete, select the three dots above the “view” button and click delete.



3. Instances

This tile on the homescreen contains the reports that have been scheduled. (Note: The “Instance Time” will autofill the date that you are viewing the folder. You must enter a date range to view reports that have been ran at other times. The date format in this folder is **DD/MM/YYYY**).



C. Reports

Reports are listed in folders by name. To view and run a report live, navigate to the report you want to run by following: Folders > Public Folders > ____live_folder > Select the subfolder. Then click on the name of the report you wish to run. The date to the right is the date the report was auto mapped; this is *not* the date the report was last updated.

The screenshot shows the SAP BusinessObjects interface. At the top, there are navigation tabs: Home, Favorites, Recent Documents, Recently Run, and Applications. Below these are five main panels: Folders (highlighted with a red box), Categories, BI Inbox, Instances, and Recycle Bin. The main content area shows a breadcrumb path: Public Folders / michigan_live_folder / Case Management Reports /. A table of reports is displayed with columns: Title, Favorites, Type, Description, and Last Updated. A red arrow points to the report 'Client List with EE and Service Inf...'. The left sidebar shows a tree view of folders, with 'Public Folders' and 'michigan_live_folder' highlighted with red boxes. The 'Case Management Reports' folder is also highlighted with a red box.

Title	Favorites	Type	Description	Last Updated
Case Management		Folder		May 16, 2022 4:46 AM
Case Note Summary		Folder		May 16, 2022 4:46 AM
Goals and Objectives		Folder		May 16, 2022 4:46 AM
Client list		Web Intelligence	Listing of clients with name...	May 16, 2022 4:46 AM
Client List with EE and Service Inf...		Web Intelligence		May 16, 2022 4:46 AM
Client Service Transaction List wit...		Web Intelligence	Updated: 3/29/2019 - Adde...	May 16, 2022 4:46 AM
Complete List of Clients with EE (...)		Web Intelligence		May 16, 2022 4:46 AM
Staff activity report		Web Intelligence	Lists program entries and n...	May 16, 2022 4:46 AM

D. Report Prompts

Prompts determine how and what information is pulled into a report.

Prompts vary by report and must be completed for the report to run correctly.

Common prompts include:

1. **EDA Provider-** The Enter Data (EDA) provider in ServicePoint. This prompt pulls in data for one specific project and reduces data chatter between projects. The prompt only allows the selection of one EDA provider and should not be used in conjunction with multiple providers or provider groups (the report will not pull correctly).
2. **Effective Date-** The date that the data is effective. Generally, it is one day after the end-date.
3. **Provider Group/s-** The provider group/s the report will include. Provider groups must be built within the Admin tab in ServicePoint prior to adding prompts. Some reports do not have the option to run by provider group. Add by clicking on the name of the group to select and clicking “Ok”.
4. **Start Date & End Date-** The timeframe that the report will pull information. The date can be completed manually or by using the calendar icon.
5. **Provider/s-** The project/s the report will include. In some cases, projects may already be listed and can be removed by clicking on the checkbox in the bottom left corner of the prompt screen, and clicking on the “x” next to the provider you want to remove. (You can also hit “reset all” on the main prompt page to clear all preset prompts).
6. **Program Type Code-** The type of programs to include in the report (ex. Emergency Shelter).

Housing Move In Data Quality Report ...

Prompts

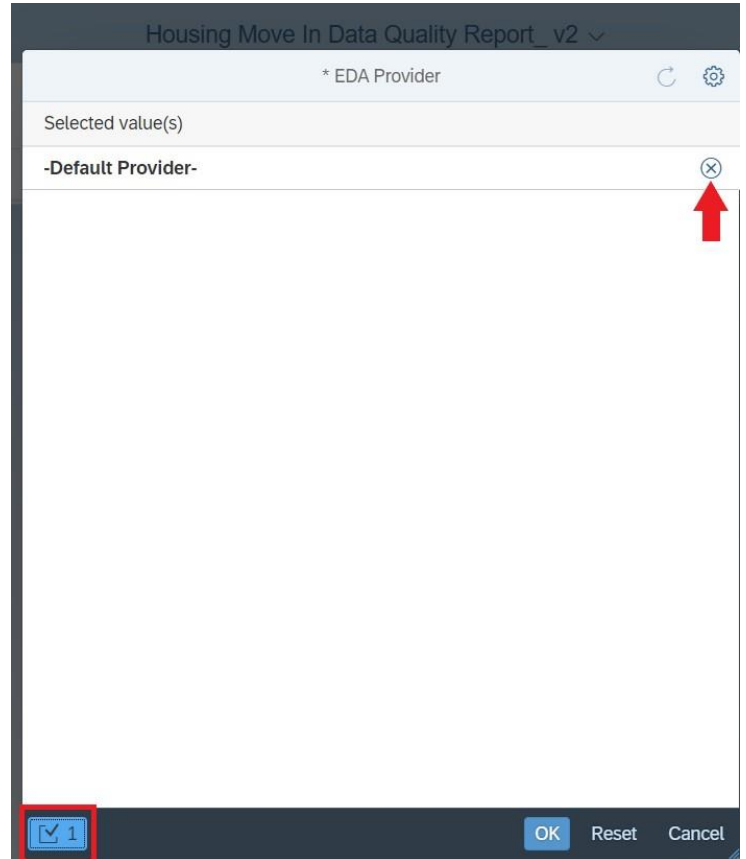
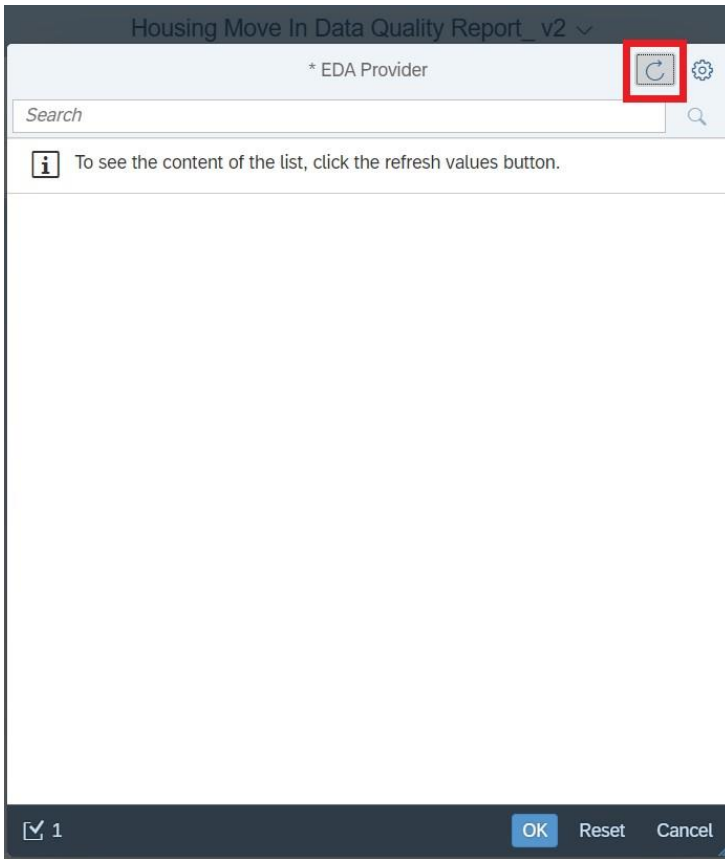
Search

- *EDA Provider
-Default Provider-
- *Enter effective date
1/1/2019 12:00:00 AM
- *Provider Group:
None Selected
- *Start Date:
1/31/2019 12:00:00 AM
- *End Date:
2/1/2019 12:00:00 AM
- Provider(s):

Mandatory (5) Run Reset All Cancel

Helpful Notes:

- To populate a list of available prompts, click the “refresh” arrow in the top right corner of the screen (pictured on the left).
- To remove a prompt, click on the “number with check box” icon in the bottom left corner of the screen, and then click on the “x” next to the value you want to remove (pictured on the right).



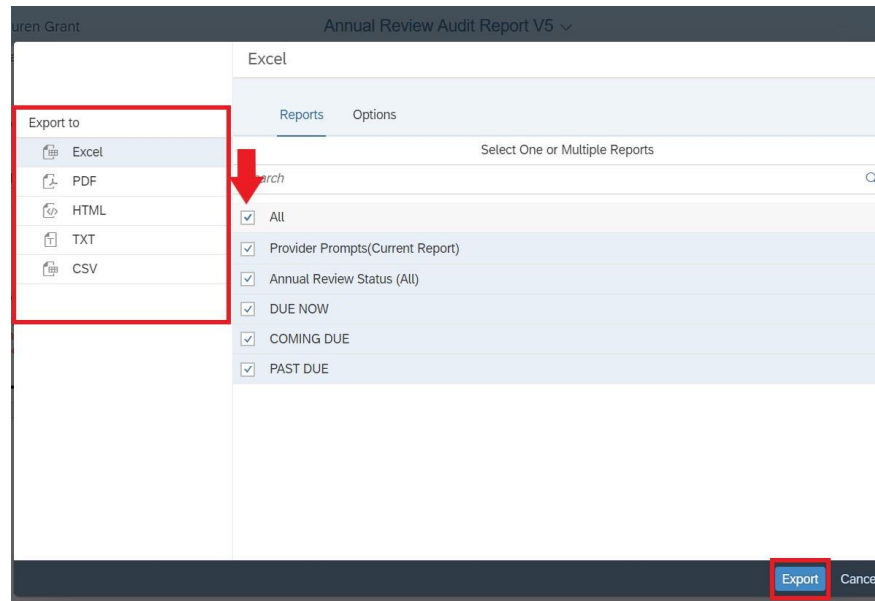
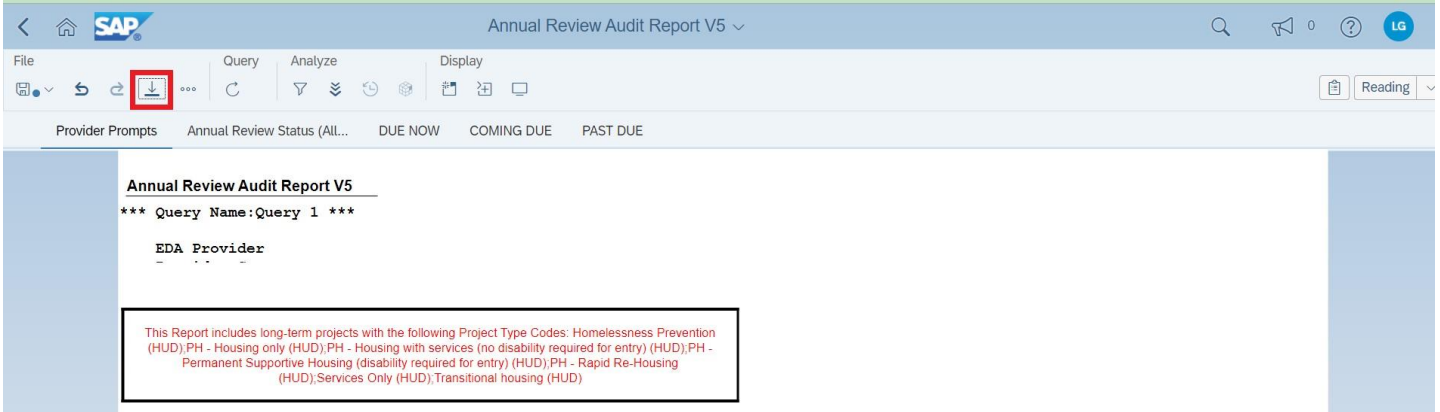
E. View Report vs. Schedule Report

View Report

Reports that are run live will populate on the screen once complete and allow the user to view the report before exporting from BusinessObjects. Running a report live can be a bit slow and only one live report can be viewed at a time.

To run a report live, navigate to the report you wish to run, click on it, follow the prompts on the screen, and click “Run”.

To export a report, click on the icon pictured below, and select “Export”. On the prompt screen that appears select which tabs of the report you wish to export, and what format you want the report to export in. Once you have selected the prompts you want, click “Export” at the bottom of the screen and the report will download to your computer.



Schedule Report

Reports that are scheduled allow the user to run multiple reports at the same time. The user does not need to stay in BusinessObjects while the report is running. Schedule report prompts are listed below.

First, to schedule a report, navigate to the report you wish to run and click on the three dots on the far right of the reports row, and select "Schedule" from the drop down.

Grant Folders

Selected Folder

Public Folders / michigan_live_folder / Data Quality / Incongruity and Audit Reports /

	Title	Favorites	Type	Description	Last Updated	
<input type="checkbox"/>	Annual Review Audit Report V5		Web Intelligence		May 16, 2022 4:52 AM	...
<input type="checkbox"/>	Client Counts on Entry not matc...		Web Intelligence	Run in View mode to use t...	May 16, 2022 4:52 AM	...
<input type="checkbox"/>	Client Location Audit Report		Web Intelligence		May 16, 2022 4:52 AM	...
<input checked="" type="checkbox"/>	Clients with multiple Households		Web Intelligence		May 16, 2022 4:52 AM	...
<input type="checkbox"/>	Destination Client Level Audit Re...		Web Intelligence		May 16, 2022	View
<input type="checkbox"/>	Destination Client Level Audit Re...		Web Intelligence		May 16, 2022	Properties
<input type="checkbox"/>	Destination Data Quality Report ...		Web Intelligence		May 16, 2022	Modify
<input type="checkbox"/>	Household Data Quality Report V2		Web Intelligence		May 16, 2022	Mobile Properties
<input type="checkbox"/>	Housing Move In Data Quality R...		Web Intelligence		Jun 16, 2022	Schedule
<input type="checkbox"/>	Housing Move In Data Quality R...		Web Intelligence		May 16, 2022	History
<input type="checkbox"/>	Housing Status Audit Report - Cli...		Web Intelligence		May 16, 2022	Categories
<input type="checkbox"/>	Housing Status Audit Report v3		Web Intelligence	Updated 03.12.12 Shows c...	May 16, 2022	Mark As Favorite
<input type="checkbox"/>	Housing Status Audit Report- w ...		Web Intelligence	Updated 03.12.12 Shows c...	May 16, 2022	Details
<input type="checkbox"/>	Rental Assistance and Destinatio...		Web Intelligence		May 16, 2022	Organize
<input type="checkbox"/>	ROI Audit Report - Current Client...		Web Intelligence		May 16, 2022	Delete

On the Schedule screen, follow the prompts as explained below:

SAP Welcome: Lauren Grant BI Launch Pad

Schedule

1 General Report Features 5

Instance Title

Title*

2 Annual Review Audit Report V5

Destinations

Delivery Destinations

3 Add

Selected Delivery Destinations

- Default Enterprise Location
- BI Inbox

Recurrence

Run Report:

4 Now

Allow Retries

OFF

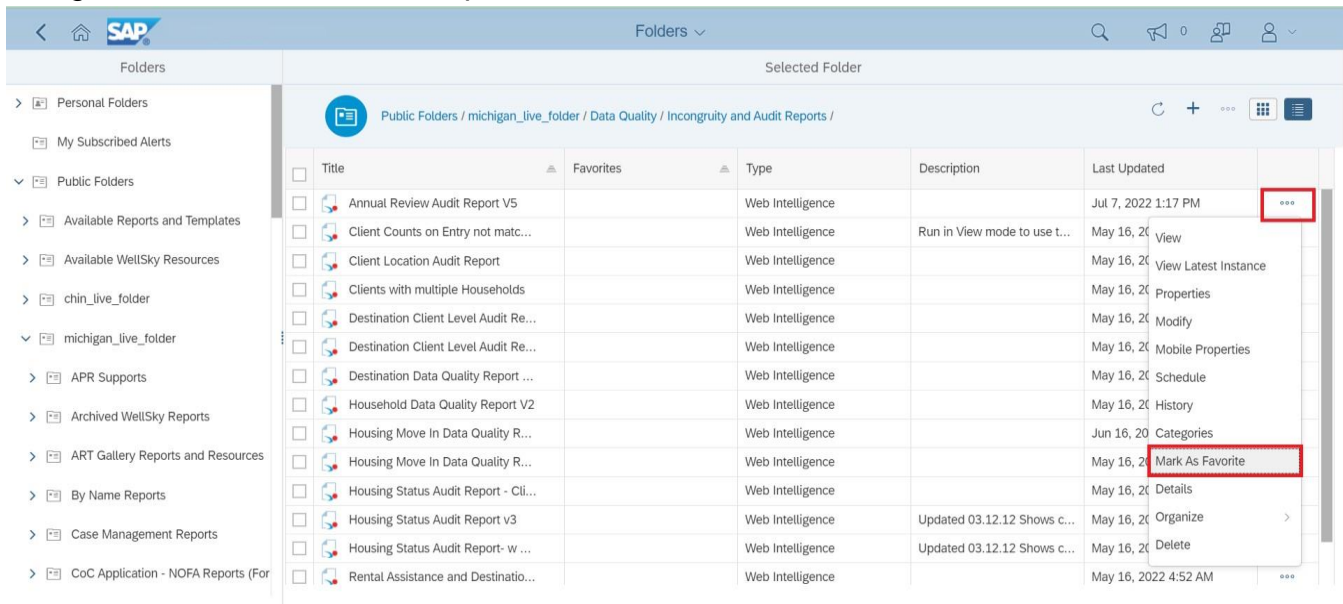
Schedule Close

1. **General Tab-** This is where you should start when scheduling a report.
2. **Title-** This will automatically populate as the name of the report in BusinessObjects. It can also be customized here.
3. **Delivery Destination-** “Default Enterprise Location” is automatically populated here; it is recommended you click “add” to select “BI Inbox” as well. If you do not add “BI Inbox”, the report will only populate in the “Instances” folder.
4. **Recurrence: Run Report -** How often the report will run. Select either “Now”, “Once”, “Recurring”, or “Calendar”. Keep in mind that the prompts (including dates) will all remain the same for “recurring” and “calendar” scheduled reports. *(Events and Scheduling Server Group are advanced settings that are not required for running reports. Notification Options are at the bottom of this screen if you wish to receive an email when your report is complete).*
5. **Report Features-** Once the “General Tab” is complete, navigate to this tab to complete report prompts.
6. **Formats -** Use this to select the format you wish the report to run as. We do not recommend running a report in the “Web Intelligence” format. Other options include: Excel, Adobe (PDF), CSV - Data, CSV - Archive Reports, Plain Text and HTML Archive.
7. **Edit Prompt Values -** Clicking on this hyperlink will bring up the report prompt screen. Follow the prompts as you would running the report live.
8. **Schedule -** Once you have completed all of the required information for scheduling the report, click “Schedule”. You will be automatically taken to the “Instances” folder. Once the report has successfully been run it will populate in your BI Inbox (if you selected that location in the prompts).

F. Favorite Reports

A new feature available in BusinessObjects is the ability to “Favorite” reports that you frequently use. Doing this will make them readily available on your BusinessObjects dashboard.

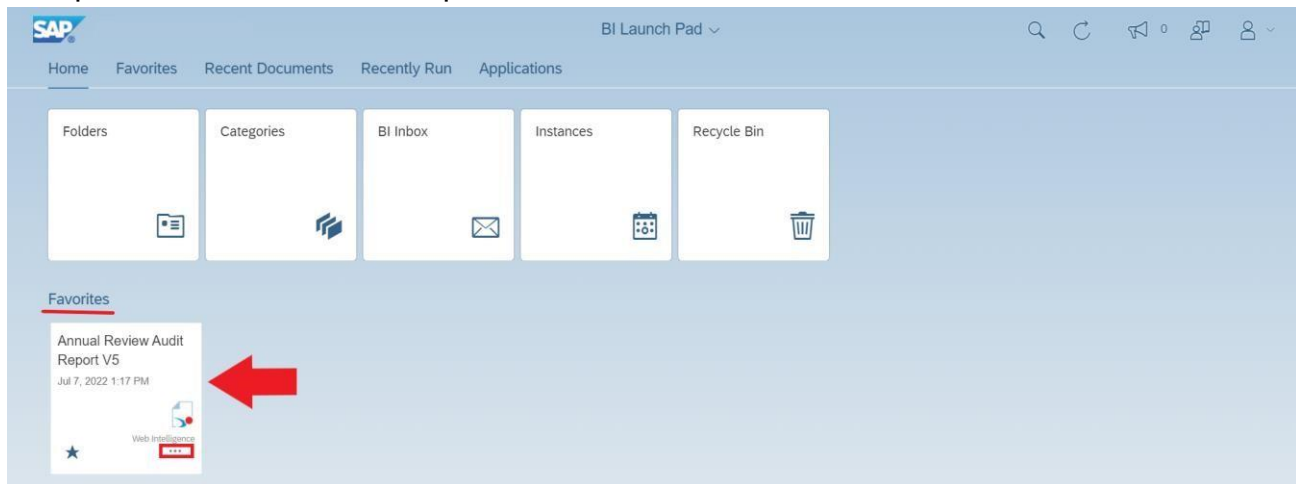
To favorite a report, navigate to it in BusinessObjects and click the three dots on the far right of the row. From the drop down, click “Mark as Favorite”.



The screenshot shows the SAP BusinessObjects interface. On the left is a navigation pane with folders like 'Personal Folders', 'Public Folders', and 'michigan_live_folder'. The main area displays a table of reports. The first row is 'Annual Review Audit Report V5', updated on Jul 7, 2022 1:17 PM. A context menu is open over this row, listing actions like View, View Latest Instance, Properties, Modify, Mobile Properties, Schedule, History, Categories, Mark As Favorite (highlighted), Details, Organize, and Delete.

Title	Favorites	Type	Description	Last Updated
Annual Review Audit Report V5		Web Intelligence		Jul 7, 2022 1:17 PM
Client Counts on Entry not matc...		Web Intelligence	Run in View mode to use t...	May 16, 2022
Client Location Audit Report		Web Intelligence		May 16, 2022
Clients with multiple Households		Web Intelligence		May 16, 2022
Destination Client Level Audit Re...		Web Intelligence		May 16, 2022
Destination Client Level Audit Re...		Web Intelligence		May 16, 2022
Destination Data Quality Report ...		Web Intelligence		May 16, 2022
Household Data Quality Report V2		Web Intelligence		May 16, 2022
Housing Move In Data Quality R...		Web Intelligence		Jun 16, 2022
Housing Move In Data Quality R...		Web Intelligence		May 16, 2022
Housing Status Audit Report - Cli...		Web Intelligence		May 16, 2022
Housing Status Audit Report v3		Web Intelligence	Updated 03.12.12 Shows c...	May 16, 2022
Housing Status Audit Report- w ...		Web Intelligence	Updated 03.12.12 Shows c...	May 16, 2022
Rental Assistance and Destinati...		Web Intelligence		May 16, 2022 4:52 AM

Click the “Home” icon at the top of the screen, and the report will be listed in your “Favorites” on your BusinessObjects dashboard. From here you can click on the report tile to run and view the report live OR you can click the three dots in the bottom right corner of the report tile to schedule the report.



The screenshot shows the SAP BusinessObjects BI Launch Pad dashboard. The 'Home' tab is selected, and the 'Favorites' section is visible. A red arrow points to the 'Annual Review Audit Report V5' tile, which shows the report title and the date 'Jul 7, 2022 1:17 PM'. The dashboard also features sections for Folders, Categories, BI Inbox, Instances, and Recycle Bin.

If you have any questions about the material covered in this document, please contact the MCAH help desk at mihelp@mihomeless.org (MI) or nchelp@nchmis.org (NC).