

# Accessing BusinessObjects & Running Reports - Work Instructions



## 1.0 Overview

These instructions provide the necessary steps on accessing BusinessObjects & Running Reports. SAP BusinessObjects is a platform used by Clackamas County for accessing custom reports.

## 2.0 Work Instructions

### 1. Accessing SAP BusinessObjects

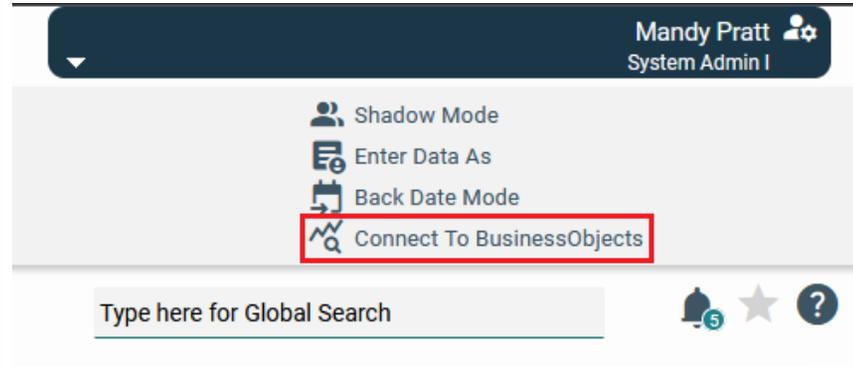
- Log in: Navigate to top right corner and select "Connect to BusinessObjects."
- Ensure pop-ups are enabled in your browser settings
- You will be directed to the BI Launch Pad.
- Select **Folders > Public Folders > pdxmetroarea\_hmis\_live > Clackamas County**.

**Note:** If you do not have access and would like to utilize SAP BusinessObjects, please contact [HMISAdmin@clackamas.us](mailto:HMISAdmin@clackamas.us)

### 2. Running Reports

- Locate the desired report within sub-folders.
- Select report name to run it directly in the browser.
- Or select the three dots next to the report and select Schedule for future automated reports.

### 1. Accessing Sap BusinessObjects



### 2. Running Reports

The screenshot shows a list of reports in the SAP BusinessObjects interface. The breadcrumb path is 'Public Folders / pdxmetroarea\_hmis\_live\_folder / Clackamas County / Data Quality /'. The table below lists several reports, with the first one, 'Data Quality (Local 0260) v12.1', highlighted in red. The table has columns for Title, Type, and Description. The 'Data Quality (Local 0260) v12.1' report is of type 'Web Intelligence' and has a description 'This report is a m...'. A context menu is open for this report, showing options like View, Properties, Copy Opendoc Link, Modify, Mobile Properties, and Schedule. The 'Schedule' option is highlighted in red.

Title	Type	Description
Data Quality (Local 0260) v12.1	Web Intelligence	This report is a m...
EntryExit Query v.2.6	Web Intelligence	View
Housing Status At Exit w/Client Names_Mis...	Web Intelligence	Properties
Program Performance v.2.0	Web Intelligence	Copy Opendoc Link
Shortcut to EntryExit Query v.2.6	Shortcut	Modify
		Mobile Properties
		Schedule

# Accessing BusinessObjects & Running Reports - Work Instructions



### 3. Viewing Reports

- a. After selecting a report, it will load (may take a few minutes depending on size).
- b. Report prompts will appear for additional specifications (refer to Section 5 for detailed instructions).

### 4. Scheduling Reports

- a. Select three dots next to a report and select Schedule.
- b. Toggle through prompt pages and ensure all required fields are filled before finalizing the schedule.

### 5. Report Formats

- a. Default is Web Intelligence for browser viewing.
- b. Change to **Microsoft Excel - Reports** for Excel-based report handling.

### 3. Viewing Reports

The screenshot shows a web interface for viewing reports. It features a search bar at the top left. Below it are several filter sections: 'Reporting Group(s) (Optional) (All values)', 'HMIS Provider(s) (Optional) (All values)', 'EDA Provider (1) -Default Provider-', 'Start Date: (1) 7/1/2022 12:00:00 AM', and 'End Date PLUS 1 Day: Please select at least one value'. On the right side, there are 'Prompts' and a 'Reporting Group(s) (Optional)' dropdown menu. A search bar for prompts is present with the text 'Search or enter value(s) manually'. An information icon indicates 'To see the content of the list, click the refresh values button.'

### 4. Scheduling Reports

The screenshot shows the 'Schedule' tab of the scheduling interface. It has two tabs: 'General' and 'Report Features'. The 'Title' field is required and contains the text 'Data Quality (Local 0260) v12.1'. Below the title field is a section for 'Destinations'.

### 5. Report Formats

The screenshot shows the 'Report Features' tab of the report format interface. The 'Report Features' tab is highlighted with a red box. Below it is the 'Formats' section, which contains a dropdown menu with 'Microsoft Excel - Reports' selected.

# Accessing BusinessObjects & Running Reports - Work Instructions



## 6. Prompts Management

- Select Edit Prompt Values to modify existing prompts.
- Familiarize with common bugs such as delayed loading of prompts, which will be resolved soon.

## 7. General Prompt Setup: Provider (Project)

- Never fill out the EDA Provider.
- Refresh the provider list if no results appear initially.

### 7.1 General Prompt Setup: Date

- Manually type or select using the calendar icon.
- Defaults to today's date.

## 6. Prompts Management

## 7. General Prompt Setup: Provider (Project)

### 7.1 General Prompt Setup: Date

# Accessing BusinessObjects & Running Reports - Work Instructions



## 3.0 Resources

---

### [3.1 Referenced Material](#)

### [3.2 Related Material](#)

- [2024 HUD Data Dictionary \(linked\)](#)

### [3.3 Contacts](#)

- [HMISAdmin@clackamas.us](mailto:HMISAdmin@clackamas.us)