



HOUSING  
ALLIANCE  
DELAWARE

# COMMUNITY MANAGEMENT INFORMATION SYSTEM

## SAP Business Objects 4.3

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Housing Alliance Delaware  
CMIS Lead Agency

October 2022

For any inquiries,  
please contact [cmis.support@housingalliancede.org](mailto:cmis.support@housingalliancede.org).

## Table of Contents

<b>Introduction</b> .....	<b>3</b>
<b>User and Access</b> .....	<b>3</b>
<b>Login Procedures</b> .....	<b>3</b>
Locate BusinessObjects: Option 1.....	3
SAP Homepage.....	5
Locate BusinessObjects: Option 2.....	5
<b>Business Objects Navigation</b> .....	<b>6</b>
Home Screen.....	6
Folders.....	6
Navigation Pane .....	7
Dover_live_folder .....	7
Finding Reports .....	8
Favorites.....	9
<b>Report Execution</b> .....	<b>9</b>
Prompts.....	9
Tabs.....	11
Save/Export.....	11
Data Refresh.....	12
Hidden Navigation .....	12

## Introduction

WellSky has completed its work to migrate ART to **BusinessObjects**, the new advanced reporting tool in CMIS. Previously, ART was an older version of BusinessObjects (3.1) and has now upgraded to Version 4.3. The upgrade should improve the performance and usability of the advanced reporting tool.

The workflow of the BusinessObjects reporting tool is still similar to ART. All reports in BusinessObjects need to refresh overnight before any data changes can be reflected on it.

## User and Access

Only users with an approved ART license will be able to access BusinessObjects.

If you or another user would like access to BusinessObjects, please contact [CMIS.support@housingalliance.org](mailto:CMIS.support@housingalliance.org) to request a purchase of a license. The annual fee is \$125/person.

Please be reminded that if your agency does not have a license for BusinessObjects, HAD's CMIS team can run advanced reports upon request.

## Login Procedures

### Locate BusinessObjects: Option 1

Login to CMIS as you normally would by entering your username and password. Once logged in, locate the Reports tab as shown below:

The screenshot shows the Delaware CMIS Home Page Dashboard. At the top, it displays the WellSky logo and 'Community Services'. Below that, the title 'Delaware Community Management Information System (Delaware CMIS)' is shown, along with the Housing Alliance Delaware logo and the date 'May 17, 2022'. The main navigation bar includes 'Home > Home Page Dashboard'. On the left, a sidebar menu lists various options: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, SkanPoint, Reports (highlighted with a red box), Admin, and Logout. The main content area is titled 'System News (75)' and 'Agency News (0)'. It contains a table of news items with columns for 'Date' and 'Headline'. The news items include: '05/12/2022 ART Unavailable This Weekend', '05/09/2022 [OFFICE HOURS] SAVE THE DATE! May Virtual Office Hours', '05/02/2022 [HUD Exchange] Onboarding Toolkits for ESG-Funded Programs', '04/28/2022 UPDATED 4/29/22 - CANCELED [ART] ART Unavailable This Weekend', '04/04/2022 [OFFICE HOURS] SAVE THE DATE! April Virtual Office Hours', and '03/09/2022 [HAD UPDATE] CMIS Team LIMITED Availability 3/28/22-4/1/22'. At the bottom of the dashboard, there are buttons for 'Add System News', 'View All', and 'Customize Home Page Dashboard'. A footer bar at the very bottom contains 'Legal Notices'.

Date	Headline
05/12/2022	ART Unavailable This Weekend
05/09/2022	[OFFICE HOURS] SAVE THE DATE! May Virtual Office Hours
05/02/2022	[HUD Exchange] Onboarding Toolkits for ESG-Funded Programs
04/28/2022	UPDATED 4/29/22 - CANCELED [ART] ART Unavailable This Weekend
04/04/2022	[OFFICE HOURS] SAVE THE DATE! April Virtual Office Hours
03/09/2022	[HAD UPDATE] CMIS Team LIMITED Availability 3/28/22-4/1/22

Open the Reports tab and select SAP BusinessObjects:

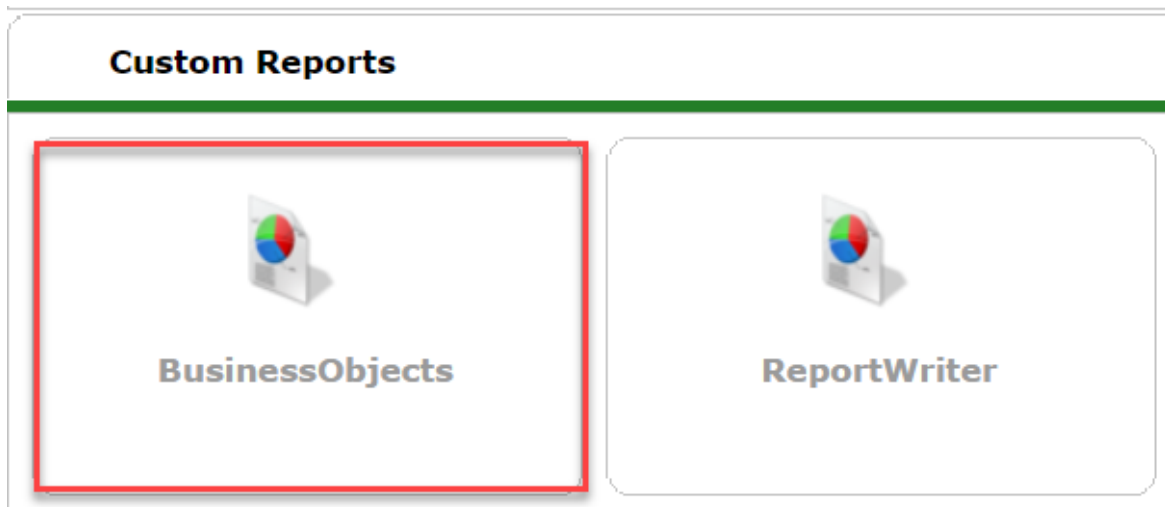
The screenshot displays a web application interface. On the left is a vertical navigation menu with the following items: Home, ClientPoint, CallPoint, ResourcePoint, ShelterPoint, Reports (expanded), Audit Access Report, Audit Report, User Information, User Login, Call Record Report, Client Served Report, CoC-APR, Coordinated Entry APR, Daily Unit Report, Data Quality Framework, Duplicate Client Report, ESG CAPER, Needs Report, PATH, Referrals, Service Transaction, System Performance Measures, BusinessObjects (highlighted with a red box and a red arrow), QLIK, ReportWriter, LSA Export, Rhymis Export, SSVF Data Quality, SSVF Export, Admin, and Logout. On the right is a news feed table with columns 'Date' and 'Headline'. The table contains several news items with dates ranging from 09/07/2022 to 10/03/2022. Below the table is a button labeled 'Add System News' and a link labeled 'Customize Home Page Dashboard'.

Date	Headline
10/03/2022	[REMINDER] End of FY22 - Time for
10/03/2022	SAVE THE DATE! CMIS Virtual Office
09/26/2022	[!FINAL REMINDER!] FY23 CMIS Doc SEPTEMBER 30
09/23/2022	[CoC] Join the Delaware Continuum
09/21/2022	[NEW FEATURE & HOW TO] Househo
09/07/2022	[DATA ENTRY] Update on HMIDs for

**BusinessObjects**

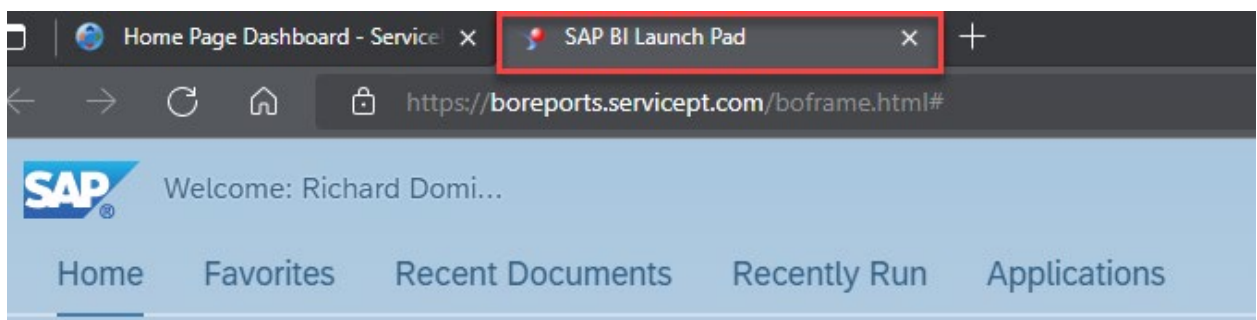
**Customize Home Page Dashboard**

You can also select the Reports tab and scroll down to locate SAP BusinessObjects:



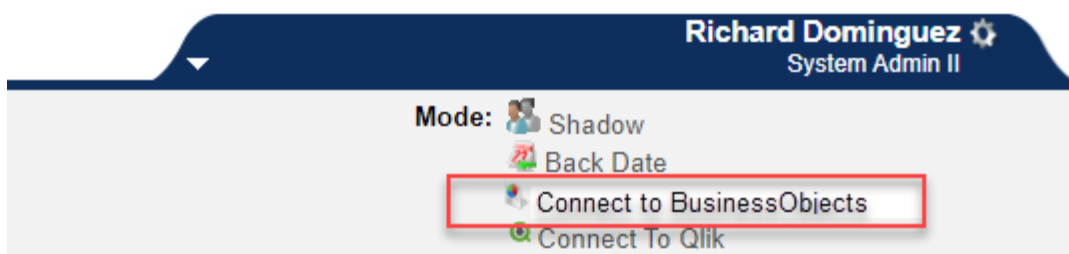
### SAP Homepage

Once selected, the SAP application will open in a new tab:



### Locate BusinessObjects: Option 2

Selecting this quick link will open the SAP web application for BusinessObjects in a new tab.



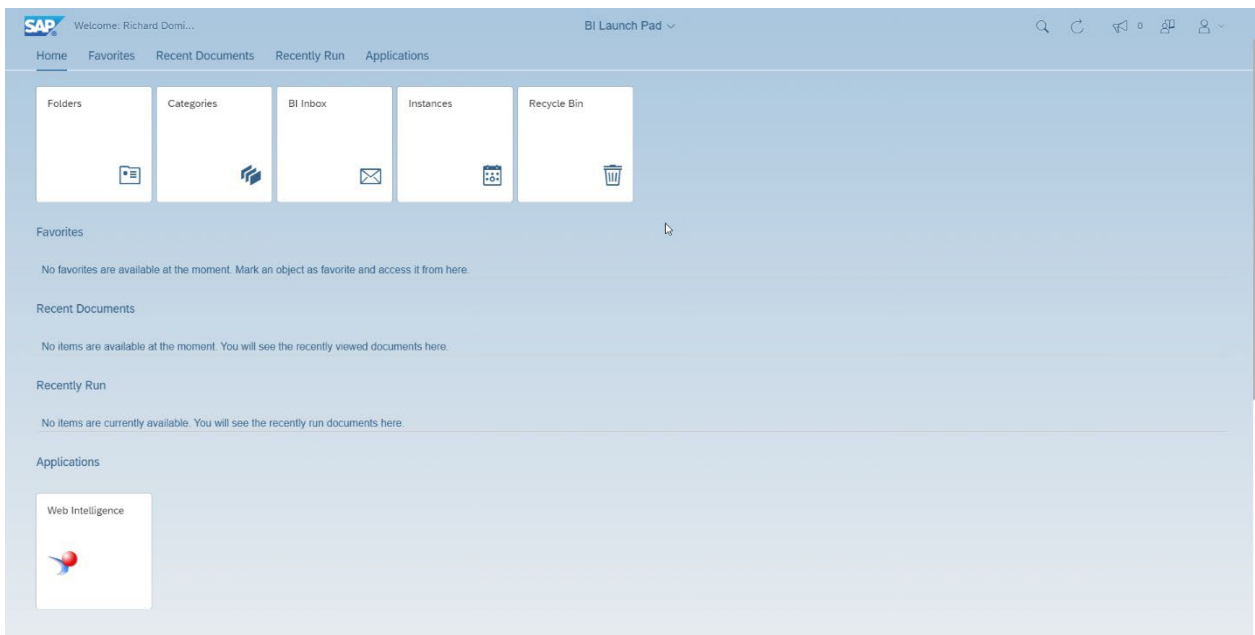
# Business Objects Navigation

## Home Screen

The SAP BusinessObjects home screen will have a new design user interface. The five main sections will direct you to that location on the site:

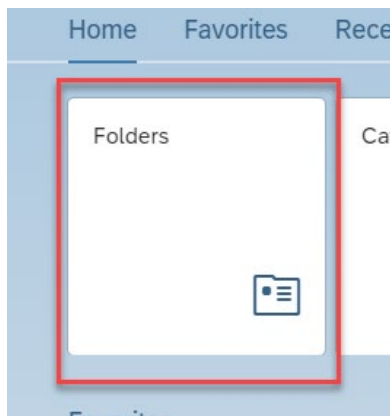
- Home,
- Favorites,
- Recent Documents,
- Recently Run, and
- Applications.

Under "Home", you will be able to navigate through the folders to locate the reports.



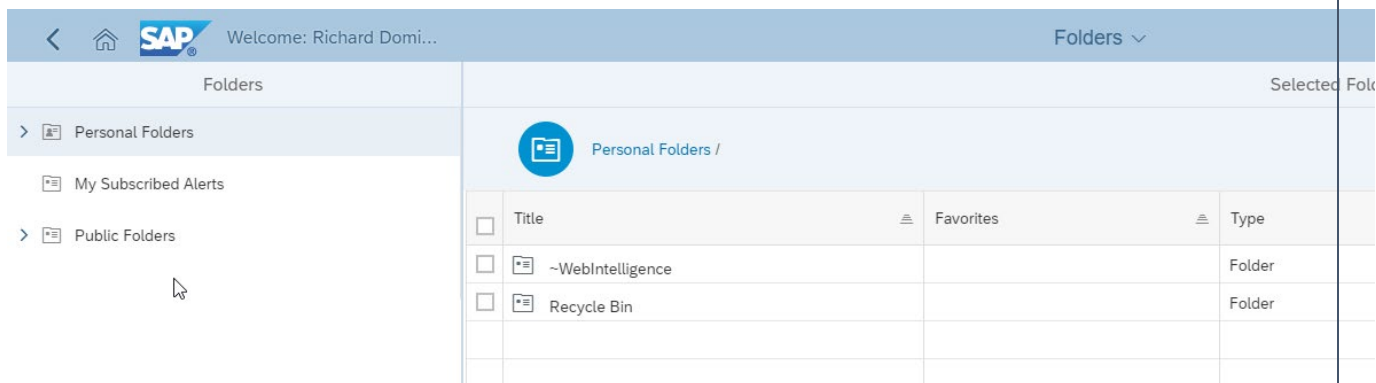
## Folders

Select the Folders box and you will be re-directed to the navigation pane for reports:

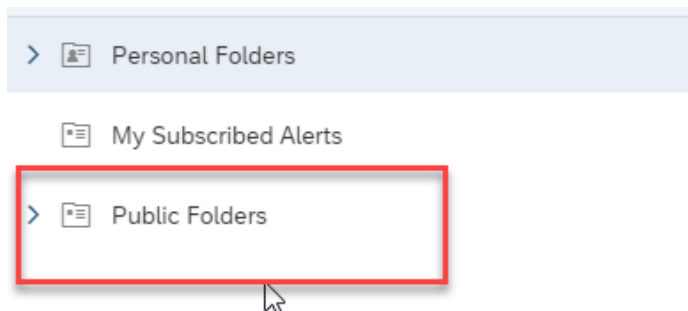


## Navigation Pane

The navigation pane has a similar layout to ART when navigating the folders to locate and select a report:

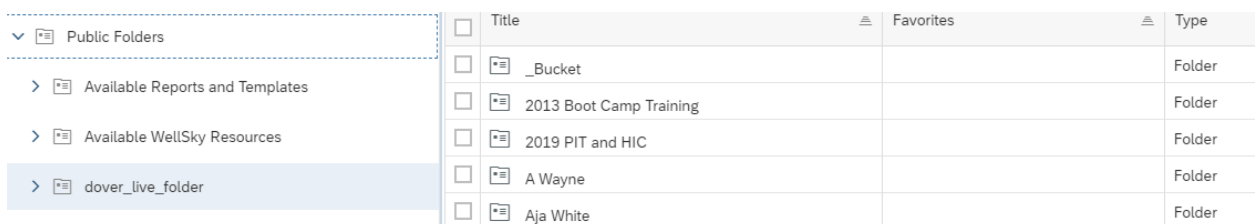


Click the Public Folders drop down selection to locate the **dover\_live\_folder**



## Dover\_live\_folder

The dover\_live\_folder will be the main folder that houses all the CMIS related folders and reports:



## Finding Reports

Continue to select the folder drop down or the folder within the navigation pane to locate your desired report. All previous report folders have been migrated over and will have the same folder path as they did before.

For example, to locate report 0260 – HUD CoC APR Data Quality/Completeness, I would go to Public Folders >> dover\_live\_folder >> ART Gallery Reports and Resources >> ART Gallery Reports >> then locate my desired report:

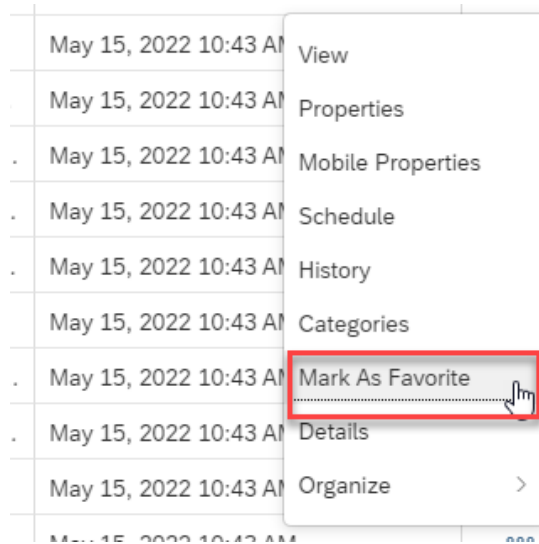
The screenshot displays a file explorer interface. On the left is a navigation pane with a tree structure of folders. The main content area on the right shows a list of report titles. The folder 'ART Gallery Reports' is selected in the navigation pane. In the main content area, the report '0260 - HUD CoC APR Data Quality/Completeness' is highlighted with a red box.

	Title
<input type="checkbox"/>	0121 - User Contact Information - v11.06.28
<input type="checkbox"/>	0122 - ART License Management Report - v3
<input type="checkbox"/>	0123 - ServicePoint User Last Login Repor...
<input type="checkbox"/>	0127 - ServicePoint Visibility and Deny Set...
<input type="checkbox"/>	0128 - Provider Assessment Display Settin...
<input type="checkbox"/>	0212 - Duplicate Clients In ServicePoint - v2
<input type="checkbox"/>	0213 - Data Elements-Quality at Record Cr...
<input type="checkbox"/>	0216 - Unexited Clients Exceeding Max Le...
<input type="checkbox"/>	0220 - Data Incongruity Locator - Age, Gen...
<input checked="" type="checkbox"/>	0222 - Workflow Elements by Client - v2
<input type="checkbox"/>	0227 - Project Descriptor Elements Data Q...
<input type="checkbox"/>	0243 - Data Completeness Report Card (S...
<input type="checkbox"/>	0252 - Data Completeness Report Card (E...
<input type="checkbox"/>	0254 - Shelter - History, Overlap, and Retu...
<input type="checkbox"/>	0260 - HUD CoC APR Data Quality/Compl...
<input type="checkbox"/>	0263 - RHY Data Completeness-Quality R...
<input type="checkbox"/>	0264 - Coordinated Entry Assessment Dat...
<input type="checkbox"/>	0265 - Coordinated Entry Event Data Quali...
<input type="checkbox"/>	0266 - Head of Household and Client Loca...
<input type="checkbox"/>	0315 - Program Daily Census - v4



## Favorites

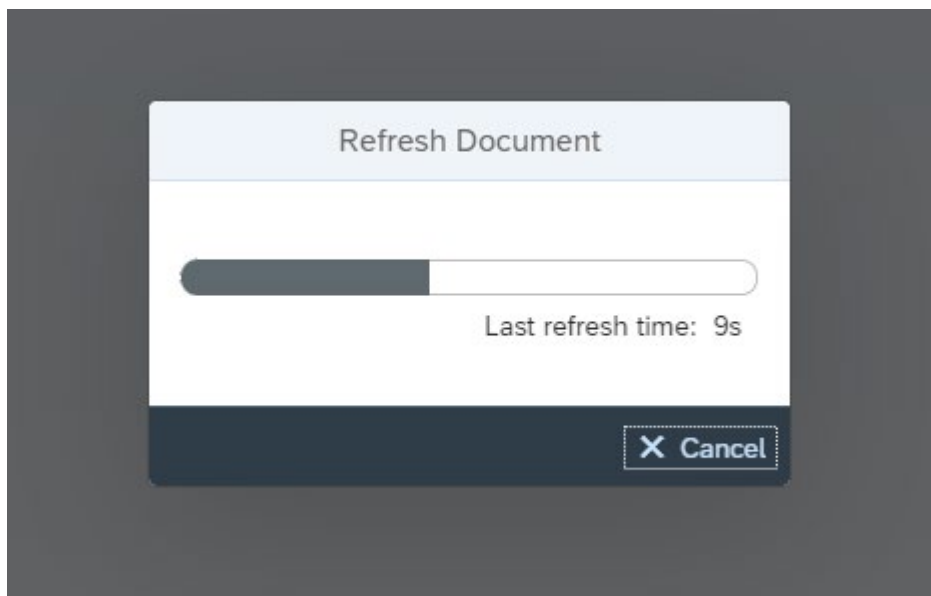
Select the ellipses at the end of the report row in the navigation pane. Then select **Mark As Favorite**. This will move the reports to your favorites section, which you can locate on the Homepage:

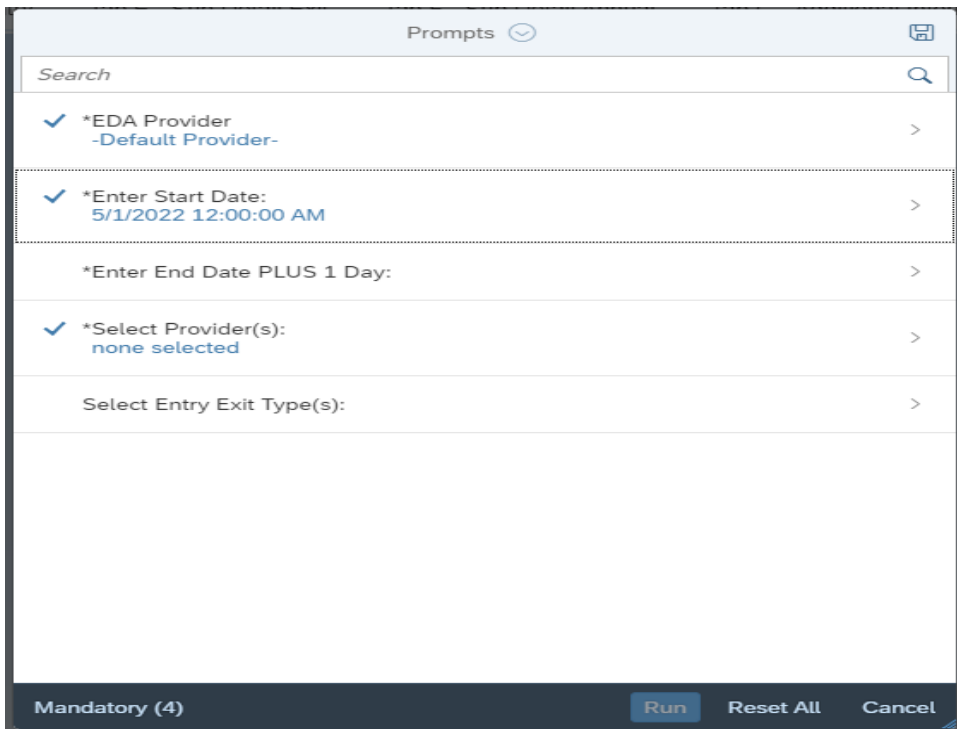


## Report Execution

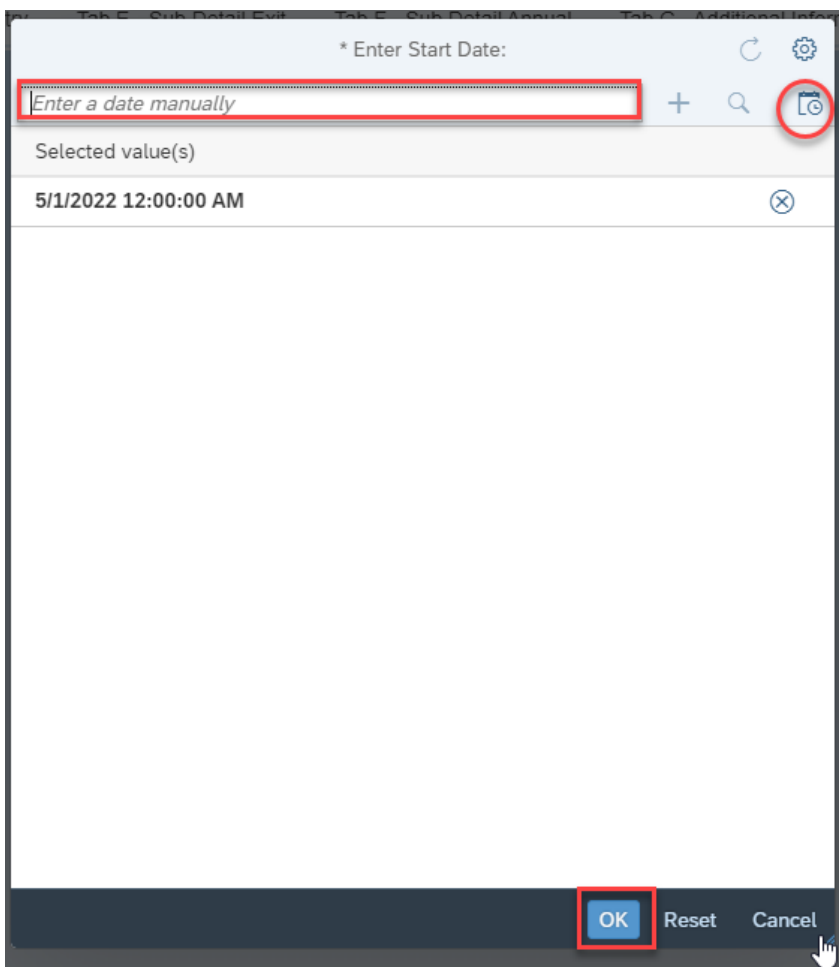
### Prompts

Once you click a report in the navigation pane, it will open to the report and begin with user prompts to set the report definitions. Please allow the report to load:

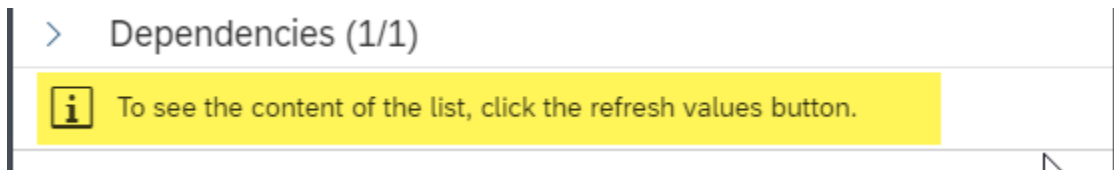




When entering date prompts, you can either enter a date manually in the text box or select the date chooser icon and select a date. Once a date is selected, click OK at the bottom:

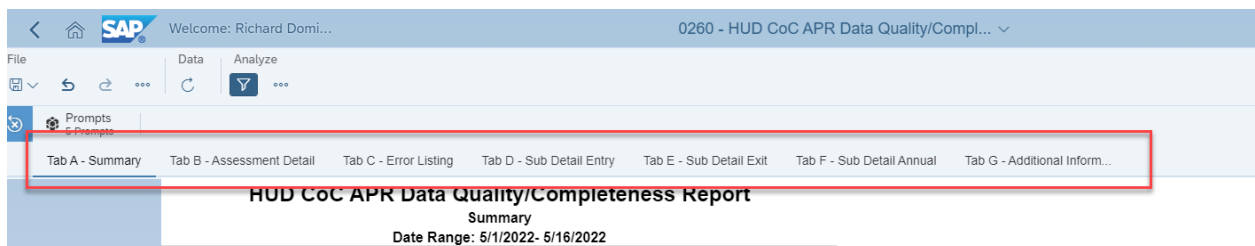


When selecting provider, or other types of prompts, be sure to click the refresh icon to load the available list of values:



## Tabs

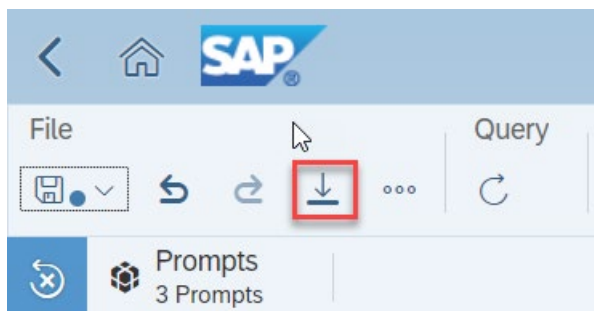
Once a report is loaded, the tabs to the different report pages are now located at the top:

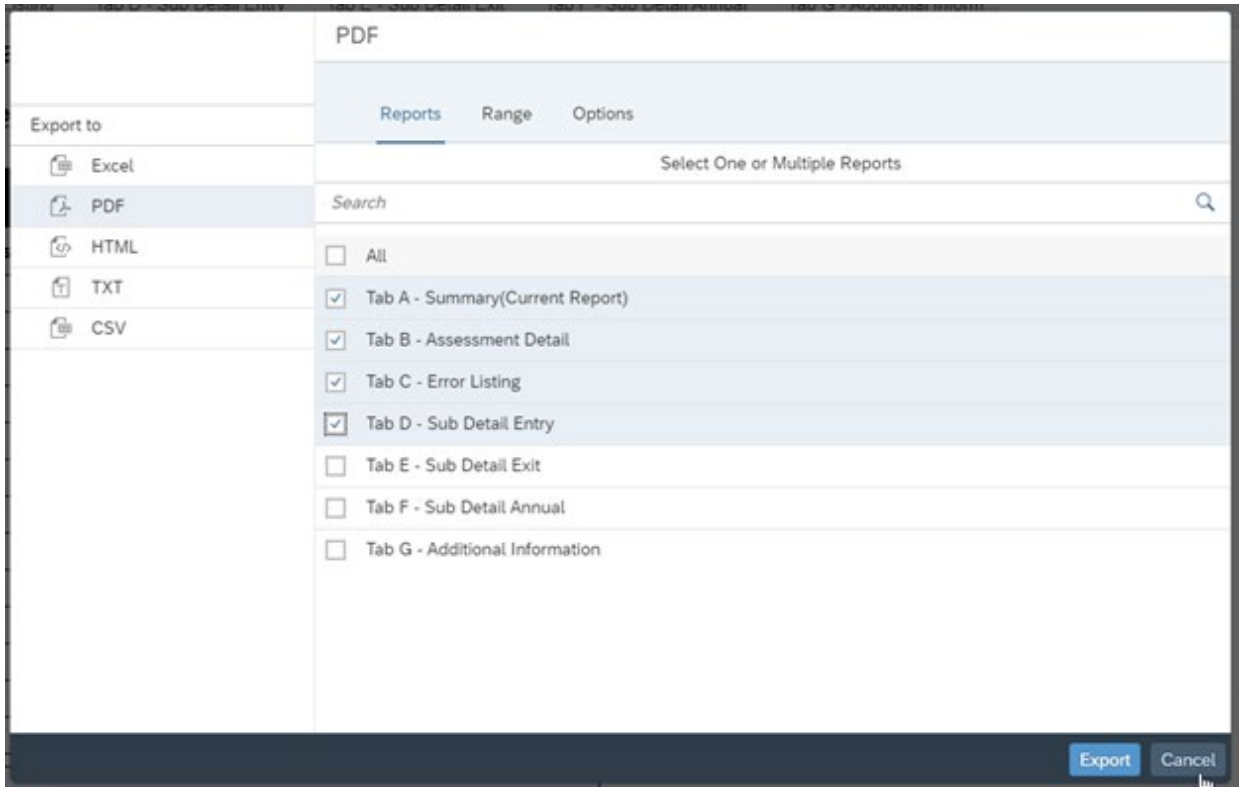


Select each tab to view the different outputs for the report. Report tabs are specific to the report. Some reports have multiple tabs that include client level details, summary details, program specific metrics, aggregate results, and report execution details.

## Save/Export

Clicking the save button only saves the report itself. To save a local copy of the results, select the download icon:



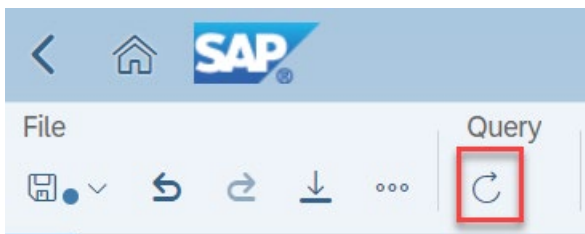


Some options will pop up and you can select your desired report output. You can choose between Excel, PDF, HTML, TXT, or CSV and then select which tabs you want to be exported.

**\*The most common exports should be Excel or PDF**

### Data Refresh

To refresh the data, select the refresh button under Data. Doing so will allow you to select an new set of prompts and create a new report for a different timeframe or new set of providers.



### Hidden Navigation

If you hover over the bottom of the report, a hidden navigation tool will pop up and allow you to zoom or navigate to different pages of the results:

