

Table of Contents

Overview	2
Objectives	2
Enterprise Roles	2
Procedure	3
A. Navigation	3
B. Creating a schedule for a report	4
C. Creating a schedule for a report with a pre-defined period	11
D. Editing a schedule for a report	13
E. Deleting a schedule for a report	14



Overview

This job aid documents the instructions on how to schedule standard pre-formatted Web Intelligence reports on Travel Management in the Umoja Business Intelligence (BI) application. It is intended for users who already have access to the public Travel Management folder in Umoja BI.

BI users can run standard pre-formatted reports in the application. The user can run those reports, export and save them in Excel, PDF, CSV or text formats and print them. When the user runs the report, the system generates the report from the latest available data set loaded in to SAP HANA from the Umoja transactional system. Data is refreshed in BI every 24 hours from ECC. Reports will display a time stamp indicating the date and time the data was last refreshed underneath the report title.

Objectives

This job aid will provide the step-by-step procedure on scheduling a BI Travel report based on a userdefined set of parameters using the Umoja BI Web Intelligence application. Please be aware that there are BI Travel reports that require a date range to be specified in the prompts and those that do not. For a report that contains mandatory date fields, a separate version for scheduling purposes is made available for a pre-defined period so users do not have to identify the dates. As of the last modified date of this document, published reports that can be scheduled are the following:

- Trips Pending Cancellation
- Trips with missing Expense Reports
- Travel Cost Recovery (can only be scheduled monthly)

If there are any changes to the existing published reports, users might have to delete the schedule of report saved in their local Favorites Folder and create a new one. It is strongly recommended that users check the Travel Job Aids page (https://www.unumoja.net/display/public/Travel+Job+Aids) regularly for updates to this document.

Please note that standard BI report functionalities, such as meaning of the icons in the tool bar, saving reports in Excel or PDF, printing reports, etc. are described in detail in the BI training courses and are therefore not fully reflected in this job aid.

Enterprise Roles

BI Travel Basic User (BI.35) BI Travel Analytical User (BI.34) BI Power User (BI.33)



Procedure

A. Navigation

- 1. Log in to Citrix: <u>https://login.umoja.un.org/Citrix/SAPVA/site/default.aspx</u>
- 2. Go to the icon called "Umoja Production".



3. Click on the BI Portal.

Umoja Production			
	ECC	Umoja Portal	BI Portal
		L	



4. Navigate to the "Travel Management" folder located within Public Folders/Umoja BI and double click to open the folder.

My Documents		Title 🔺	Туре
Folders	-	Advance Purchase Policy Compliance Report v2	Web Intelligence
Public Folders	÷	HR Partner Productivity Report	Web Intelligence
🖃 🛄 Umoja BI	-	TPO Productivity Report	Web Intelligence
🛨 📁 Finance	-	Travel Air Rail Ticket Volume (under testing - do not use)	Web Intelligence
🛨 💼 Grants Management	-	Travel Cost Recovery	Web Intelligence
🔲 Organizational Management	-	Travel Request Volumes Report	Web Intelligence
	-	Trip History Report	Web Intelligence
Personnel Administration	-	Trips Pending Cancellation	Web Intelligence
Project Systems	-	Trips with missing Expense Reports	Web Intelligence
Real Estate	-	TSA Productivity Report	Web Intelligence
🚞 Sales and Distribution			
🕀 💼 Service Desk	3		
🐑 🛅 Shared Analysis			
🐨 💼 Source To Acquire			
🎾 Travel Management			
🝽 🛄 Umoja Metrics			
····· 🛅 Workflow			
🗄 🛅 Umoja BI Incoming			

B. Creating a schedule for a report

1. Select report title and double-click to open the report. In this example, the report called "Trips Pending Cancellation" is selected.





- Job Aid
- 2. After entering values for the prompts, click "OK", and the report will run. Depending on the extent of report filtering selected in the Prompts and Umoja system performance, the report may take some time to compile. In this example, data was extracted to view trip processed by Travel Processing Office, "UNHQ New York".

 Index Trip Request Number Trip Type - Exp / Req Trip Start Date/Start Date Trip End Date/End Date UNHQ NEW YORK UNICRI TURIN Index Travel Category Employee Org Unit Select Travel Processing Office (TPO) UNHQ NEW YORK Cost Center Funds Center Funds Center Index
--

3. When the report is finished running, click "Save As".

Home Web	Documents Trips Pending Intelligence • • • • • • • • • • • • • • • • • • •	Cancell P + Save As Save As	All values) Budget Trips Pene United Nations / Un Last Refreshed: 22	Period (All values) Track ding Cancellat Meg BI / Report: Trips Pen Mey 2017 18:29 UTC	Drill • P Filter Bar F Freeze • @ Outline weler Type (All values) • Travel Reg.# (All values) • 1 ion ing Cancellation	ravel Type (Description) (All values) 🔽		Reading	• Design • 🕜
		Index No.	First Name	Last Name	Employee Org Unit	Business Area	Travel Req.#	Travel Category	Travel T
		00017523	AUDREY	AUBOU	DGACM DD FTS	United Nations Headquarters	0000316965	Entitlement Travel	EN- 1. H
		00216995	MD ALTAF	ALI	DPKO PETD ITS	United Nations Headquarters	0000319992	HR Travel	HR- 03. /
		00452809	MILENA	STEPANOVIC	DPKO PETD ITS CPTT	UNLB	0000304143	Official Travel	OT- 02. 1
		00534483	NTAGAHORAHO	BURIHABWA	DESA CDO HRM JPOP JPP NEWYORK	United Nations Headquarters	0000321417	Official Travel	OT- 01. (
		00760495	HALIMA HODHAN	ISMAEL	DPKO OCOS PSC	United Nations Headquarters	0000316695	HR Travel	HR- 09. \$
		00819414	RUBY	SANTIAGO	OLA EO	United Nations Headquarters	0000314430	Entitlement Travel	EN- 1. H
		10066672	DAVID JONATHAN	VENNETT	UNOP PAOS	United Nations Headquarters	0000316933	Official Travel	OT- 01. (
							Count of Trips: 7		
		<							*
	< >	Report 1							



4. Select "Favorites Folder", re-name the report as you see fit and click "Save". You may create a new folder for all your scheduled reports if you wish.

ave As			1
			X 📸 😂 H K 1 of 2+ ▶ ▶
+ Favorites Folder		Advances	Last Run Time 😡
	8	Agent per trip	
		Agent per trip -WF HANA Agent per trip -WF HANA autosave	_
		Agent per trip autosave	
		Agent per trip view	
Public Folders		Air travel activities	>
File Name:	Pending Cancellat	ion_scheduled	
Save As Type: Web	Intelligence		~
(>>			
			Save Cancel

5. Click on the "Documents" tab and find the report you saved to your "Favorites Folder". Right click on the report title and select "Schedule".





6. Click "Recurrence" to set the frequency or how often you would like the system to run the report. In the Recurrence panel, click the down pointing arrowhead at the "Run object" field and select one of the options.

Schedule – Trips Pending Cancellat	tion_scheduled
 Schedule Instance Title Recurrence Prompts Formats Caching Events Scheduling Server Group Destinations 	Recurrence Run object: Now Object will run now.

7. Specific scheduling criteria for the recurrence option will be displayed. In this example, "Daily" is selected from the drop-down menu.

Schedule – Trips Pending Cancellation	n_scheduled
 Schedule Instance Title Recurrence Prompts Formats Caching Events Scheduling Server Group Destinations	Recurrence Run object: Object will r Once Hourly Daily Weekly Wonthly Nth Day of Month 1st Monday of Month Last Day of Month X Day of Nth Week of the Month Calendar



8. The "Start Date/Time" and "End Date/Time prompts specify the effective date and time range for this schedule. The default values make the schedule effective immediately and for a ten year period. If you wish to change the default values, click the down pointing arrowhead to display the options for time and the calendar icon to enter the dates. Please note that the instance time displayed will be the time in Valencia, Spain where the server is based. Users can select the local time in their duty station by adding or subtracting hours depending on their time zone.

Schedule	Recurrence							
	Run object: Daily							2
Instance Title	Obiest will eve even Mideur			May	y 20	17		D
Recurrence	Object will run once every N days.	Sun	Mon	Tue	Ned	Thu	Fri	Sa
	Days(N) = 1	30	1	2	3	4	5	6
Prompts	Start Date/Time: 08 V 04 V PM V 5/22/2017	17	8	9	10	11	12	13
Formats	End Date/Time: 08 V 04 V PM V 5/22/2027	14	15	16	17	18	19	20
Caching		21	22	23	24	25	26	27
		28	29	30	31	1	2	3
Events		4	5	6	7	8	9	10
Scheduling Server Group								

9. To set the format for the scheduled report instances, click "Formats" and select the desired output format. In this example, we selected "Microsoft Excel" since the report instance is going to an email destination as a spreadsheet attachment. You may select "Adobe Acrobat" if you prefer but only one option is permitted for each schedule. If the report instance is going to a BI Inbox, the Web Intelligence format is the best option. Web Intelligence is the default output format and it will be used unless you click another option on this screen.

Schedule – Trips Pending Cancella	ation_scheduled
 Schedule Instance Title Recurrence Prompts Formats Caching Events Scheduling Server Group Destinations 	Formats Output Format Web Intelligence Microsoft Excel Adobe Acrobat Comma Separated Values (CSV) Plain Text



10. To define the parameters for where the report instances will be sent, click "Destinations". To display the drop-down menu, click on the down pointing arrowhead.

Schedule – Trips Pending Cancellatio	n_scheduled
 Schedule Instance Title Recurrence Prompts Formats Caching Events Scheduling Server Group Destinations 	Destinations Destination: Default Enterprise Location

11. In this example, "Email" is selected as destination. Fill in the fields by typing the email addresses the report will be sent from and sent to. You may include multiple email addresses by separating each with a comma. The subject and message fields are optional. You may also choose to use a specific name for the report to be sent as an attachment. Otherwise, the system will use an automatically generated name for the report. Click "Schedule" to create the schedule and the report will automatically run based on selected parameters.

1007-010			
er Scherlule	Destinations		
Turkey and Take	Destination:		
Instance little	Email 🗸		
Recurrence	Keen an instance in the history		
Prompts	Use default settings		
Formats	From: travel@up.org	Add Blacaboldad	
Caching	To: altavas@un.org	Add Placeholder	
	Cc:	Add Placeholder	
Events	Bcc:	Add Placeholder	
Scheduling Server Group	Subject: Trips Pending Cancellation	Add Placeholder V	
Destinations	Message: Please find attached report, "T	rips Pending Cancellation".	
		^	
	Travel Processing Office: UNH	2 New York	
	Add Placeholder 🗸		
	Add Placeholder V Add Attachment		
	Add Placeholder V Add Attachment File Name:		
	Add Placeholder V Add Attachment File Name:		
	Add Placeholder ✓ ✓ Add Attachment File Name:	Add Maceholder 🗸	
	Add Placeholder Add Alacachment File Name: Use Automatically Generated Name Use Specific Name	Add Placeholder 😒	
	Add Placeholder Add Attachment File Name: Use Automatically Generated Name Use Specific Name Enable SSL	Add Haceholder 🗡	
	Add Placeholder ✓ Add Attachment File Name: ● Use Automatically Generated Name ○ Use Specific Name □ Enable SSL	Add Haceholder 😒	
	Add Placeholder ∨ J Add Attachment File Name: © Use Automatically Generated Name □ Les Specific Name □ Enable SSL	Add Placeholder 😒	
	Add Placeholder Add Placeholder Add Attachment File Name:	Add Placeholder 🗡	
	Add Placeholder ✓ Add Attachment File Name: ● Use Automatically Generated Name ○ Use Specific Name □ Enable SSL	Add Placeholder 💙	
	Add Placeholder ✓ ✓ Add Attachment File Name: ● Use Automatically Generated Name ○ Use Specific Name	Add Haceholder 🛩	
	Add Placeholder ♥ ♥ Add Attachment File Name: ● Use Automatically Generated Name ○ Use Specific Name □ Enable SSL	Add Maceholder 🛩	



12. The report's "History" screen will be displayed. When you click "Recurring", the "Status" window will be displayed and you can check if the scheduling selections you made are listed. *Please note that if there are any changes to the existing published reports, users might have to delete the schedule and create a new one.* Please note that the instance time displayed will be the time in Valencia, Spain where the server is based.

History – Trips Pending Cancellation_scheduled							
View * Organize * Send * More Actions *							
		Instance Time 🔻	Title	Status			
	2	May 22, 2017 9:08 PM	Trips Pending Cancellation_scheduled	Running			
I	Ċ.	May 22, 2017 9:05 PM	Trips Pending Cancellation_scheduled	Recurring			



C. Creating a schedule for a report with a pre-defined period

To create a schedule for a report with a pre-defined period such as the report called "Travel Cost Recovery", the steps are exactly the same as described in previous pages of this document except users have to select the "schedule" version of the published report and save in their local Favorites folder. The "schedule" version of the report can be found in the TTS folder under the Shared Analysis folder.

A separate version to be used for scheduling had to be created to enable users to produce a report with a specific recurrence parameter. In the case of "Travel Cost Recovery", the report is configured to constantly generate data compiled for the previous month. For example, when a user schedules the report in 15 May 2017, the resulting report will contain data for 1 April 2017 to 30 April 2017. When the user sets the recurrence to be monthly, then a report will be sent every 15th of the month.





Home Documents

My Documents			Title 🔺	Туре
Folders			SG report on exceptions to standard of accommodation	Folder
🕀 💼 PPBD	~	.	Advance Purchase Policy Compliance Report	Web Intelligence
···· 🛅 Property Management		.	Advance Purchase Policy Compliance Report_common_conn	Web Intelligence
E BROF		.	Advance Purchase Policy Compliance Report_hier	Web Intelligence
		.	Air and Rail Travel Volume Report	Web Intelligence
E SA SA - Reports (SM)		*	ATAI_Class	Microsoft Excel
		.	ATAI_DataExtract	Web Intelligence
		-	ATAI_DataExtract2	Web Intelligence
🔛 SG Numbers		-	Data Extract for GHG Reporting	Web Intelligence
💴 Source to Acquire Reports		.	Expense Report Volumes Report v1	Web Intelligence
Temporary Shared Test		-	HR Partner Productivity Report_HANA_conn	Web Intelligence
		*	IATA LKUP [1]	Microsoft Excel
		-	Iata Member List_31 Mar 2017	Microsoft Excel
		1	Monthly UNHQ NY Stats	Web Intelligence
Treasury_testfolder		-	TACT_DAILY_REPORT v1	Web Intelligence
μ" 🗁 πς		-	TPO Productivity Report_common_conn	Web Intelligence
🚞 UAP		-	TPO Workload Statistics v6	Web Intelligence
🛨 💼 Umoja BI		.	Travel Air Rail Ticket Volume	Web Intelligence
🕀 🛄 UMOIA HR Reports (Test/Review)		-	Travel Cost Recovery_Schedule	Web Intelligence
		-	Trip Approval Times by TPO (under testing)	Web Intelligence
		-	Trip Detail Analysis	Analysis Workspace
		- P	Trip Volumes Report	Web Intelligence
UNCCD		-	Trips by Senior Officials	Web Intelligence
🖽 🛄 UNCTAD			TSA Productivity Report_common_conn	Web Intelligence
	V			



D. Editing the schedule of a report

1. To edit a schedule of a report, users can locate the document saved in the local "My Favorites" folder and right-click on the title to show menu options. Click on "History" to show the scheduled instances of the report.



2. Select the report instance with "Recurring" status then right-click "Reschedule".

Histor	y – Trips Pending Cancellation_schedul	ed							
View Organize Send More Actions									
	Instance Time 🔻	Title	Status		Creat				
2	May 25, 2017 6:59 PM	Trips Pending Cancellation_scheduled	Running		P1W~				
	May 25, 2017 6:59 PM	Trips Pending Cancellation_scheduled	Recurring	History Status Organize > Pause Run Now Reschedule	P1W~				



3. The window will open and allow users to change the parameters such as recurrence, formats and destinations. After entering the desired changes, click "Replace" on the right panel of the window. Choose "Replace existing schedule" then click "Schedule". Users can also create a new schedule based on the existing one if they choose to.

Reschedule – Trips Pending Cancellation_scheduled 2 😐 🤉							
	Replace Replace existing schedule Center new schedule trom existing schedule						
Replace							
Prompts							
Caching							
Events							
Scheduling Server Group							
Destinations							
		Schedule Cancel					

D. Deleting the schedule of a report

1. To delete a report's schedule, open "My Favorites" folder to locate the saved report. Right-click on the title then click "History".





2. When the History window opens, select the report instance with "Recurring" status. Right-click on "Recurring" and move the mouse over "Organize". Select "Delete" then click "OK".

History – Trips Pending Cancellation_scheduled									
View	Organize Send More Actio	ns 🔻							
	Instance Time 🔻	Title	Status		Created By				
Ľ	May 22, 2017 9:08 PM	Trips Pending Cancellation_scheduled	Success		P1W~100/B/				
Ľ	May 22, 2017 9:05 PM	Trips Pending Cancellation_scheduled	Recurring	History Status	P1W~100/B/				
			C	Organize >	Delete				
				Pause 🗸					
				Run Now					
				Reschedule					
	Delete								
	Are you sure you	want to delete the selected items: Trips Penc	ding						

OK

Cancel

Cancellation_scheduled