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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 user-defined 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.

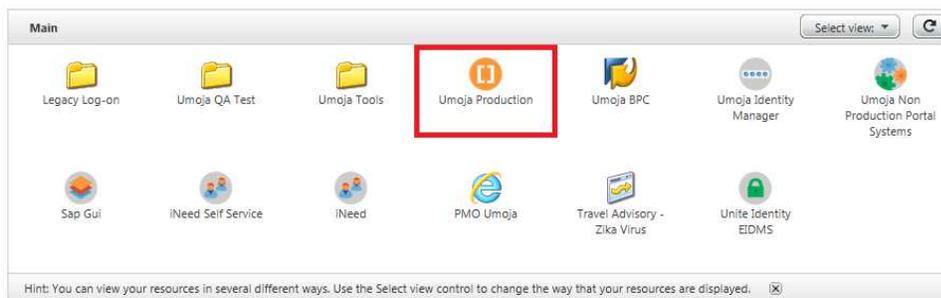
Enterprise Roles

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

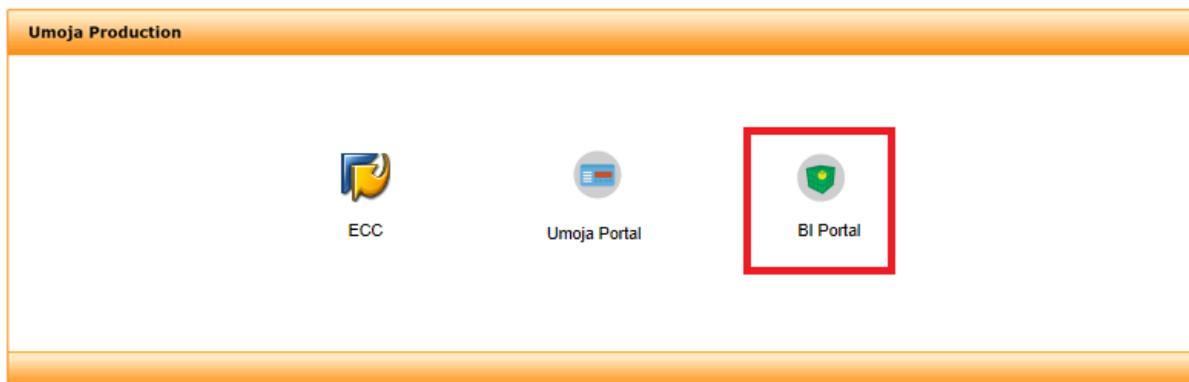
Procedure

A. Navigation

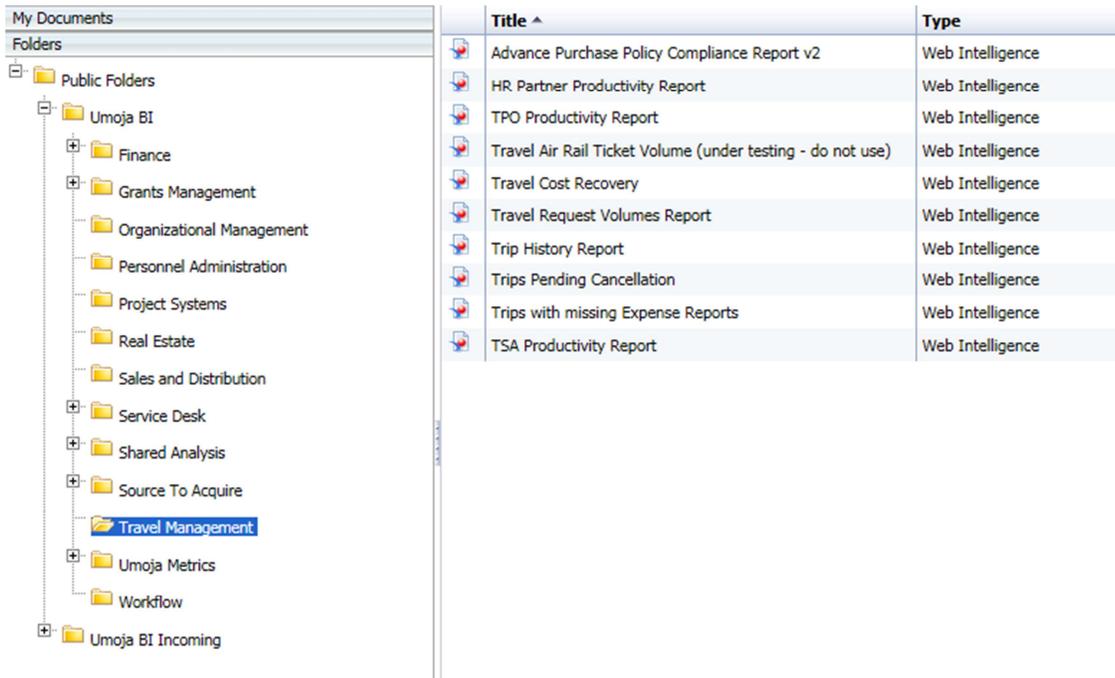
1. Log in to Citrix: <https://login.umoja.un.org/Citrix/SAPVA/site/default.aspx>
2. Go to the icon called "Umoja Production".



3. Click on the BI Portal.

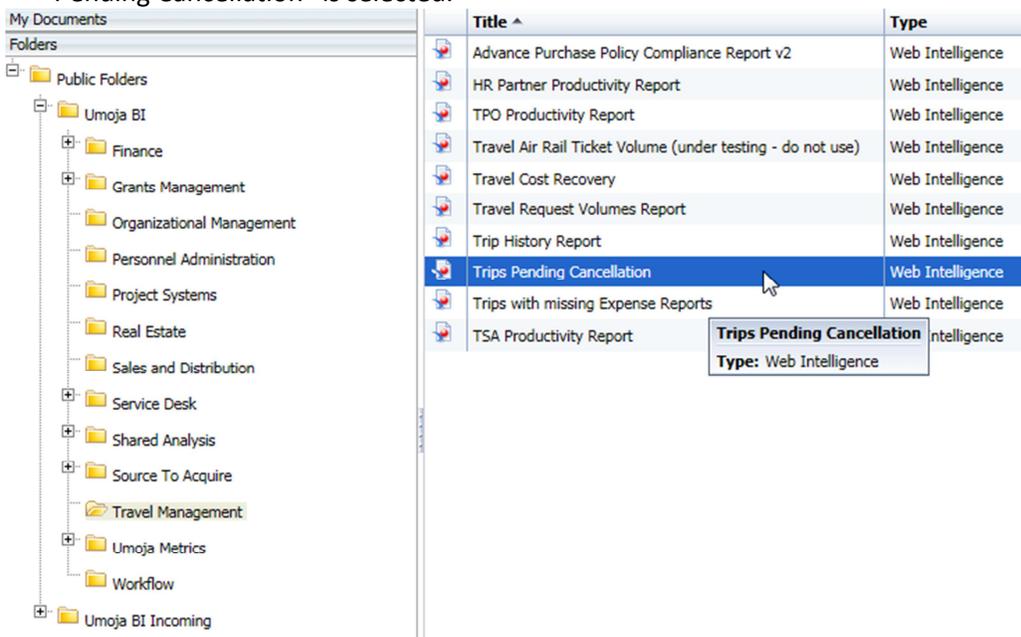


4. Navigate to the “Travel Management” folder located within Public Folders/Umoja BI and double click to open the folder.

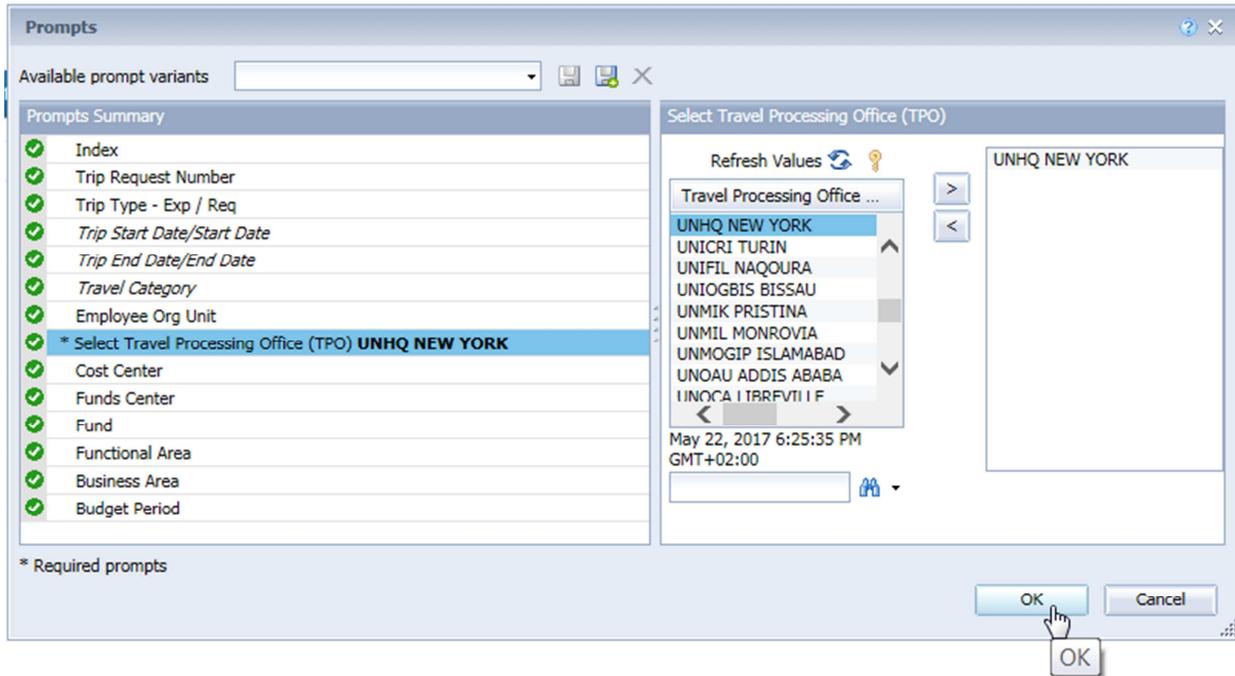


B. Creating a schedule for a report

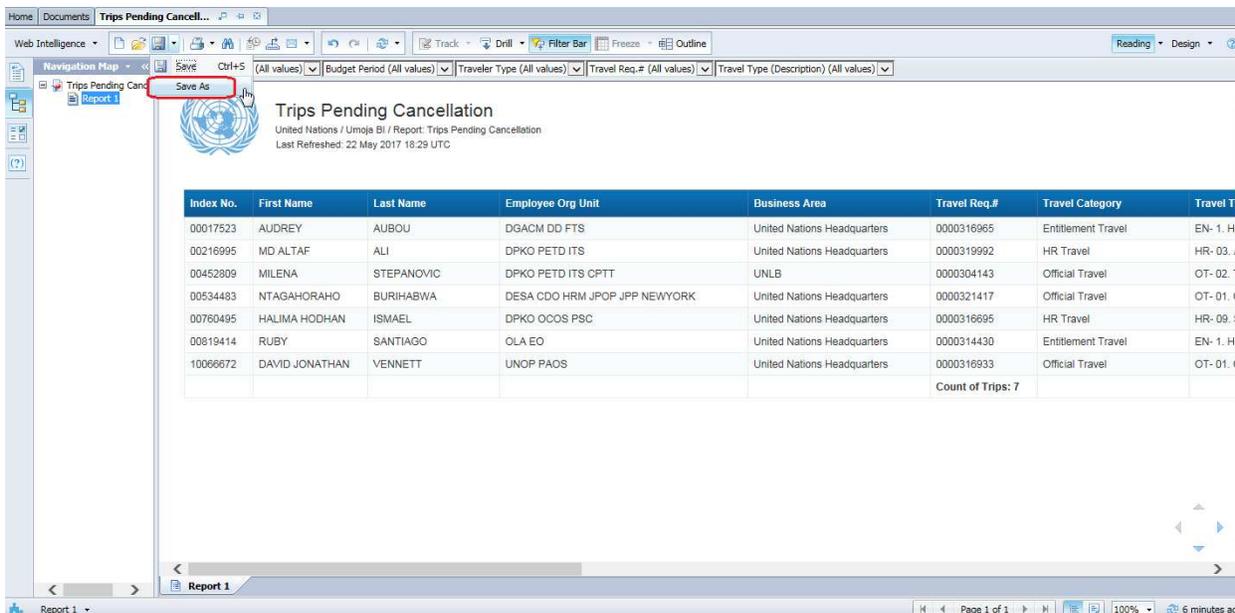
1. Select report title and double-click to open the report. In this example, the report called “Trips Pending Cancellation” is selected.



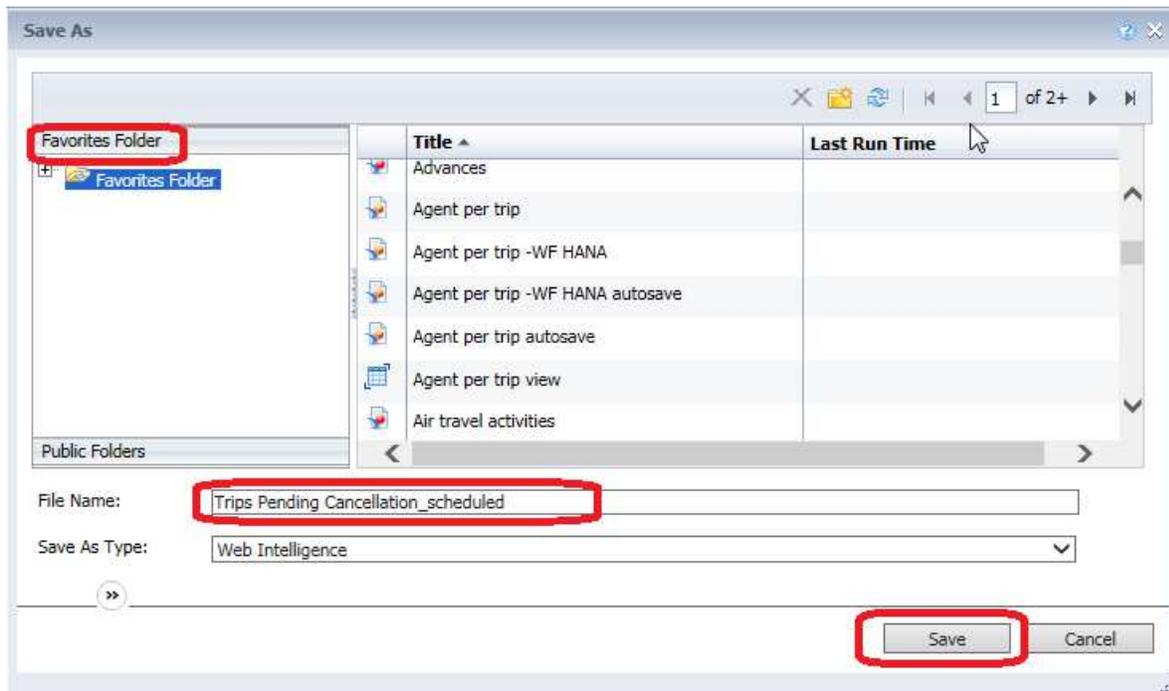
- After entering values for the prompts, click “OK”, and the report will run. Depending on the extent of report filtering selected in the Prompts and Umoja system performance, the report may take some time to compile. In this example, data was extracted to view trip processed by Travel Processing Office,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



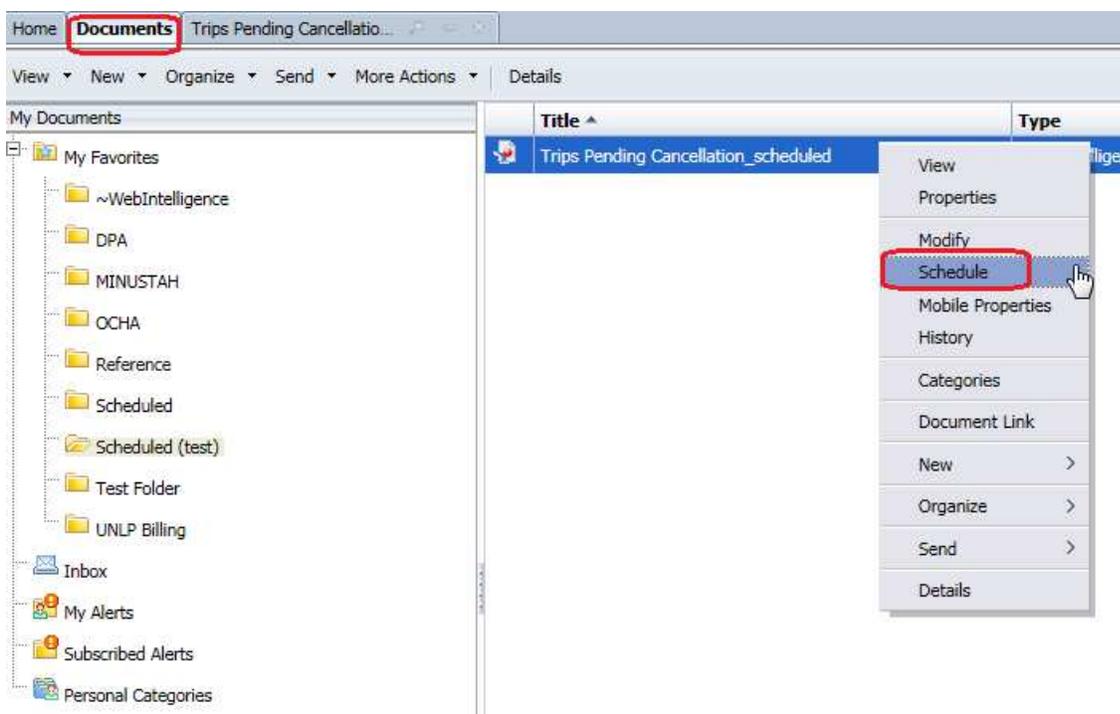
- When the report is finished running, click “Save As”.



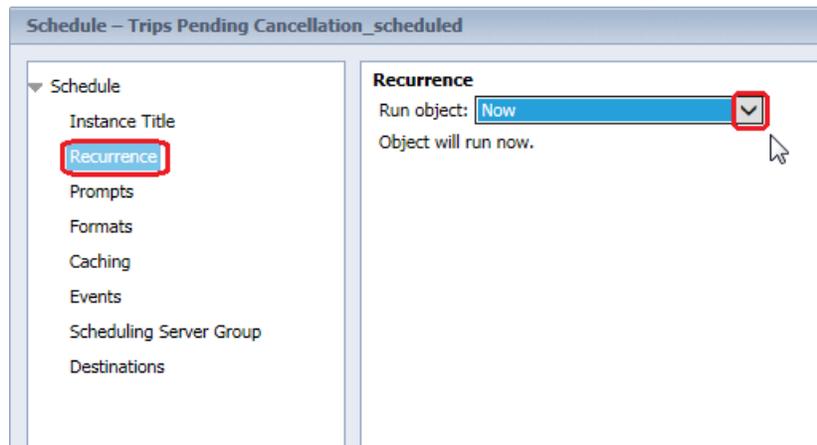
4. Select “Favorites Folder”, re-name the report as you see fit and click “Save”. You may create a new folder for all your scheduled reports if you wish.



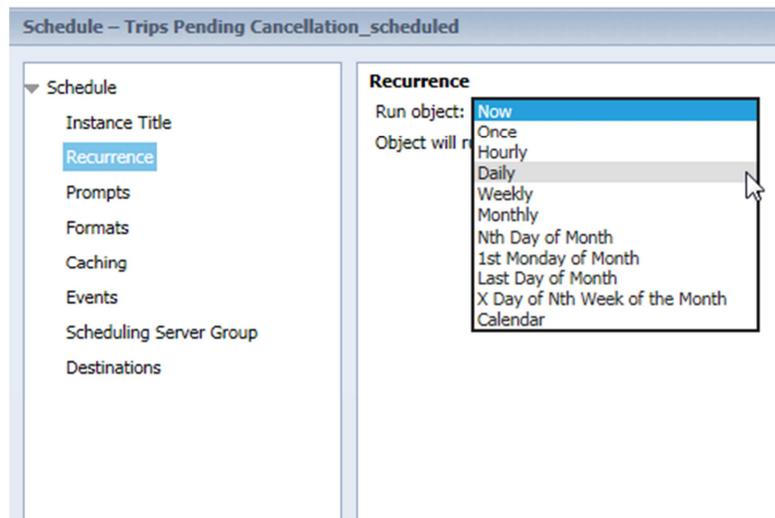
5. Click on the “Documents” tab and find the report you saved to your “Favorites Folder”. Right click on the report title and select “Schedule”.



- 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.



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



- 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 – Trips Pending Cancellation_scheduled

▼ Schedule

- Instance Title
- Recurrence**
- Prompts
- Formats
- Caching
- Events
- Scheduling Server Group
- Destinations

Recurrence

Run object: Daily

Object will run once every N days.

Days(N) = 1

Start Date/Time: 08 04 PM 5/22/2017

End Date/Time: 08 04 PM 5/22/2017

May 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3
4	5	6	7	8	9	10

- 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 Cancellation_scheduled

▼ Schedule

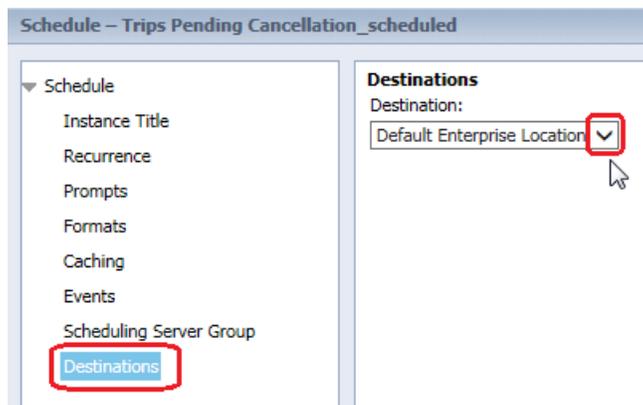
- Instance Title
- Recurrence
- Prompts
- Formats**
- Caching
- Events
- Scheduling Server Group
- Destinations

Formats

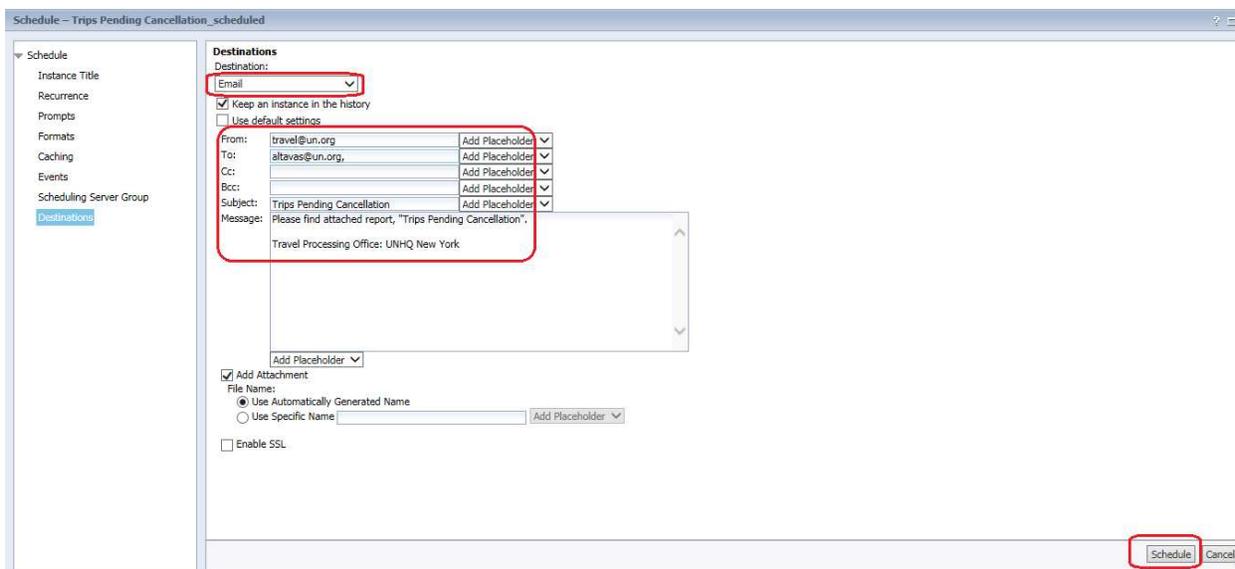
Output Format

- 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.



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.



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.

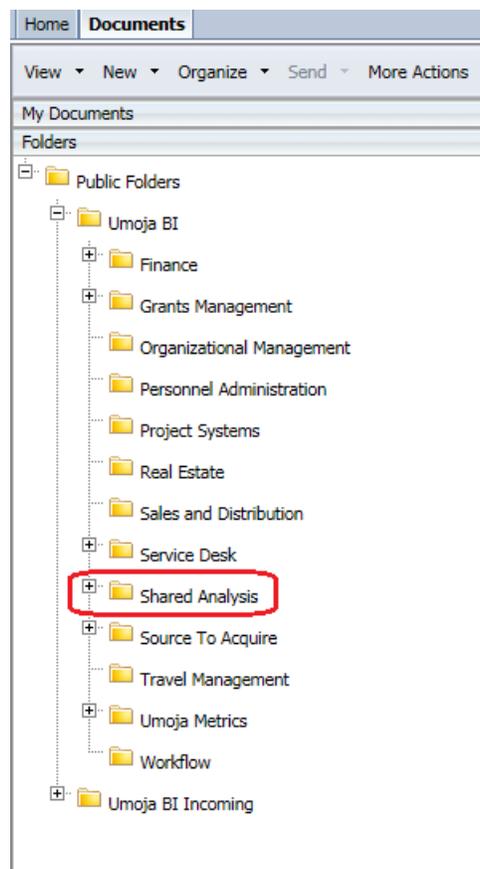
History – Trips Pending Cancellation_scheduled			
View ▾ Organize ▾ Send ▾ More Actions ▾			
	Instance Time ▾	Title	Status
	May 22, 2017 9:08 PM	Trips Pending Cancellation_scheduled	Running
	May 22, 2017 9:05 PM	Trips Pending Cancellation_scheduled	Recurring

Status	
Title:	Trips Pending Cancellation_scheduled
Document Type:	Microsoft Excel
Status:	Recurring
Destination:	Mail the instance to: "[altavas@un.org]" with a subject of: "Trips Pending Cancellation" .
Owner:	P1W~100/BALTAVAS
Creation Time:	5/22/2017 9:05 PM
Next Run Time:	5/23/2017 8:04 PM
Recurrence Type:	Object runs once every 1 days.
Parent Object Path:	User Folders/P1W~100/BALTAVAS/Scheduled (test)/
Remote Instance in Federated Cluster:	No
Expiry:	5/22/2027 8:04 PM
Formats:	Microsoft Excel
Parameters:	

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

View New Organize Send More Actions Details

My Documents

Folders

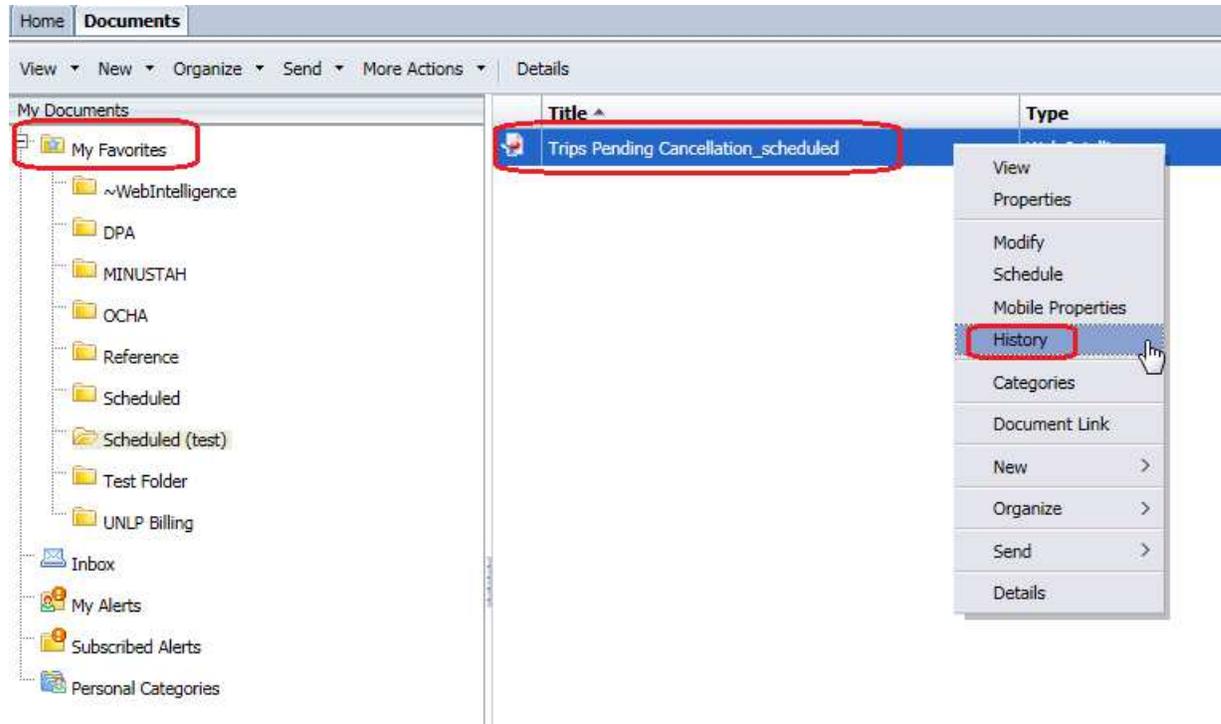
- PPBD
- Property Management
- RSCE
- SA
- SA - Reports (SM)
 - sbansal
 - SG Numbers
 - Source to Acquire Reports
 - Temporary Shared
 - Test
 - Travel Analysis
 - Treasury_testfolder
 - TTS**
 - UAP
- Umoja BI
- UMOJA HR Reports (Test/Review)
- UNAMI
- UNAMID
- UNOCD
- UNCTAD
- UNDOF

Search

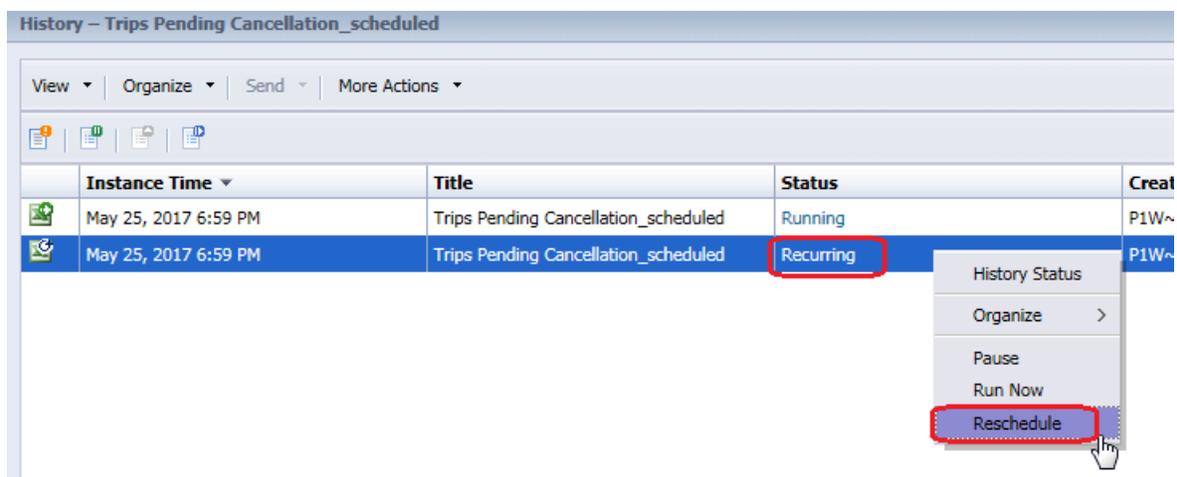
Title ^	Type
SG report on exceptions to standard of accommodation	Folder
Advance Purchase Policy Compliance Report	Web Intelligence
Advance Purchase Policy Compliance Report_common_conn	Web Intelligence
Advance Purchase Policy Compliance Report_hier	Web Intelligence
Air and Rail Travel Volume Report	Web Intelligence
ATAI_Class	Microsoft Excel
ATAI_DataExtract	Web Intelligence
ATAI_DataExtract2	Web Intelligence
Data Extract for GHG Reporting	Web Intelligence
Expense Report Volumes Report v1	Web Intelligence
HR Partner Productivity Report_HANA_conn	Web Intelligence
IATA LKUP [1]	Microsoft Excel
Iata Member List_31 Mar 2017	Microsoft Excel
Monthly UNHQ NY Stats	Web Intelligence
TACT_DAILY_REPORT v1	Web Intelligence
TPO Productivity Report_common_conn	Web Intelligence
TPO Workload Statistics v6	Web Intelligence
Travel Air Rail Ticket Volume	Web Intelligence
Travel Cost Recovery_Schedule	Web Intelligence
Trip Approval Times by TPO (under testing)	Web Intelligence
Trip Detail Analysis	Analysis Workspace
Trip Volumes Report	Web Intelligence
Trips by Senior Officials	Web Intelligence
TSA Productivity Report_common_conn	Web Intelligence

D. Editing the schedule of a report

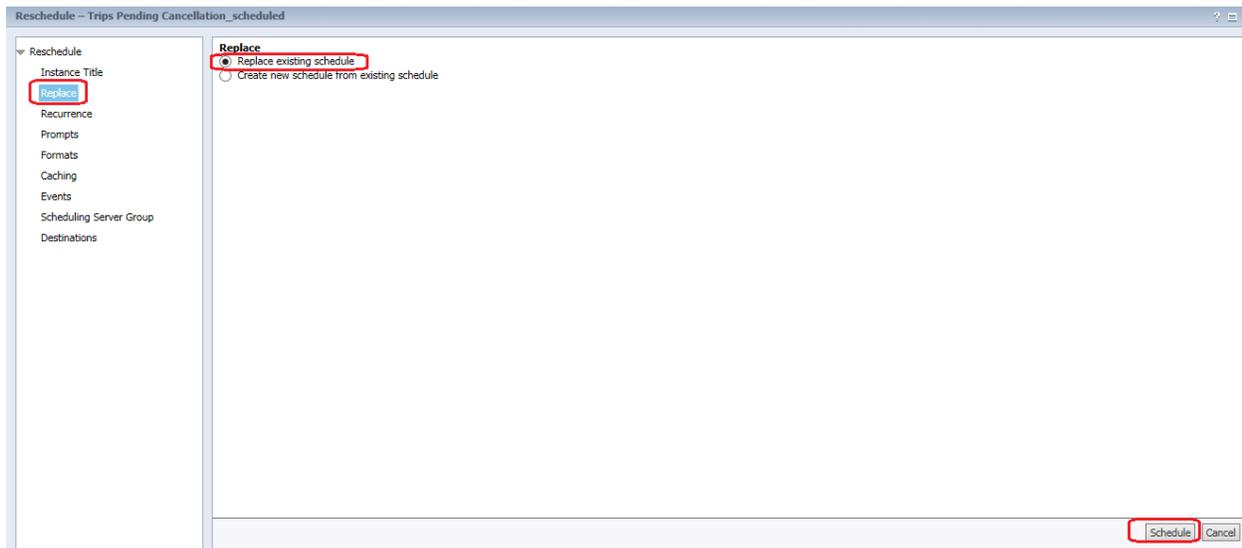
1. To edit a schedule of a report, users can locate the document saved in the local “My Favorites” folder and right-click on the title to show menu options. Click on “History” to show the scheduled instances of the report.



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

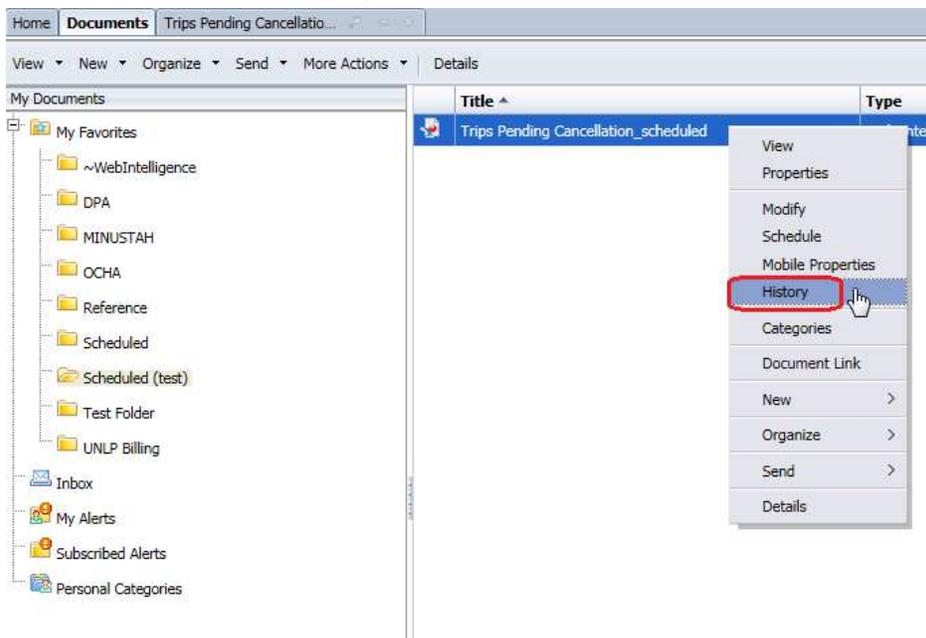


- The window will open and allow users to change the parameters such as recurrence, formats and destinations. After entering the desired changes, click “Replace” on the right panel of the window. Choose “Replace existing schedule” then click “Schedule”. Users can also create a new schedule based on the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

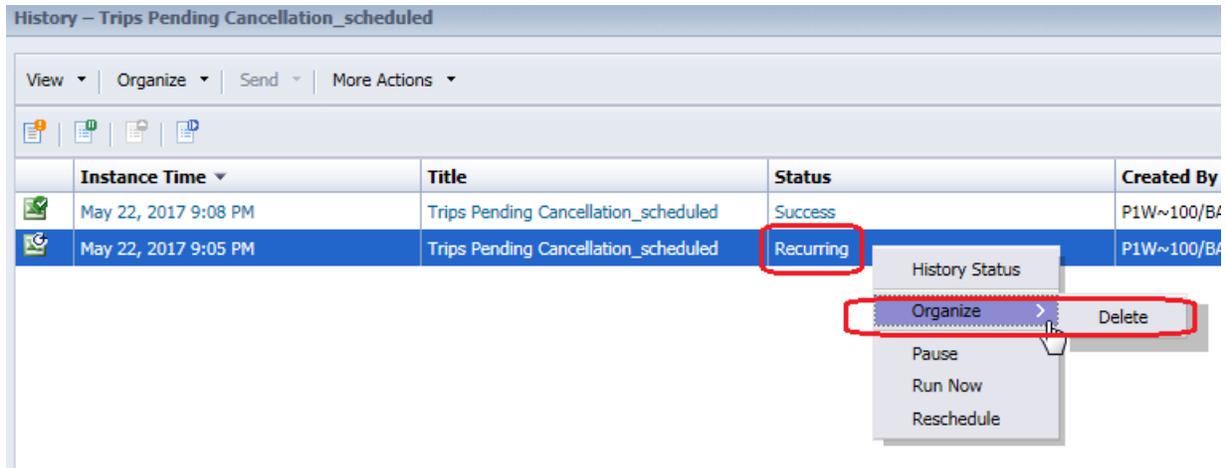


D. Deleting the schedule of a report

- To delete a report’s schedule, open “My Favorites” folder to locate the saved report. Right-click on the title then click “History”.



- 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”.

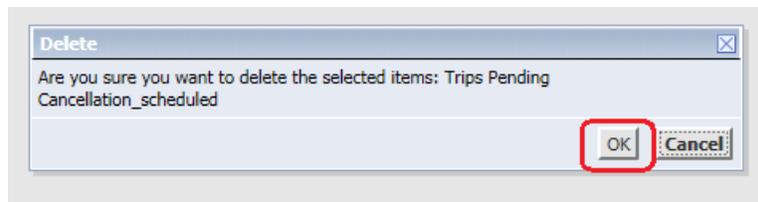


History – Trips Pending Cancellation_scheduled

View ▾ | Organize ▾ | Send ▾ | More Actions ▾

Instance Time ▾	Title	Status	Created By
May 22, 2017 9:08 PM	Trips Pending Cancellation_scheduled	Success	P1W~100/BA
May 22, 2017 9:05 PM	Trips Pending Cancellation_scheduled	Recurring	P1W~100/BA

Context menu options: History Status, Organize >, Delete, Pause, Run Now, Reschedule.



Delete

Are you sure you want to delete the selected items: Trips Pending Cancellation_scheduled

OK Cancel