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Overview

This job aid documents how to generate the Business Intelligence (BI) report entitled “TPO Productivity Report”, which gives the user a list of all workflow (WF) actions performed on a certain date or during a certain time period by a Travel Processing Office (TPO) as of the given refresh date of the document. Note that this report measures productivity, meaning that it counts all WF statuses performed by TPO staff. This could mean that there are multiple WF statuses for one Trip Number, in case the TPO touches it more than one time. Therefore, it differs from a pure “Trip Number Volume” report, for which other reports are made available.

BI users can run pre-formatted standard reports in BI. 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.

Objectives

This Job Aid will provide the step-by-step procedure on how to generate a report on all workflow actions performed on a certain date or during a certain time period by a TPO using the Umoja BI Web Intelligence application.

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. is described in detail in the BI training courses and are therefore not fully reflected in this job aid. The job aid focuses on providing guidance to users on how to access the report and set the filters.

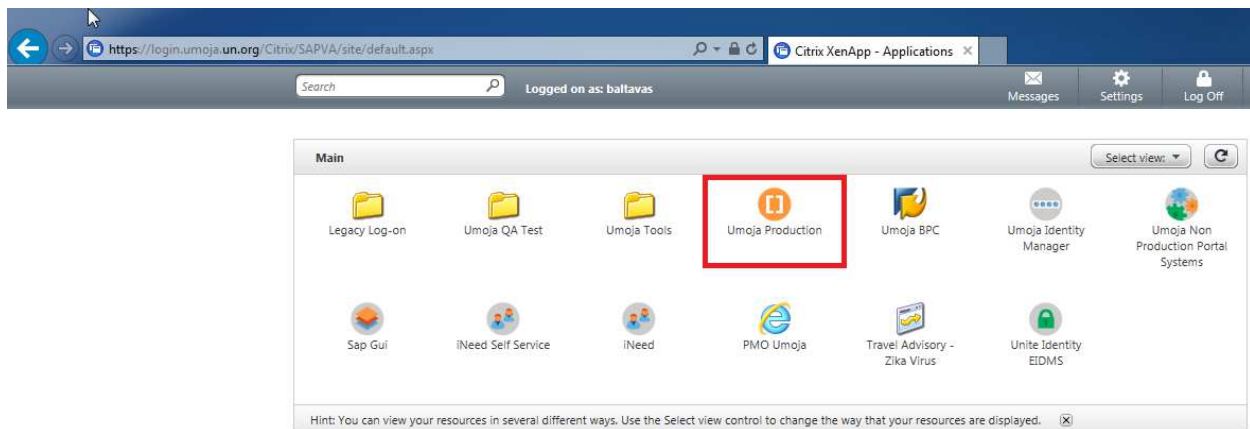
Enterprise Roles

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

Procedure

A. Navigation

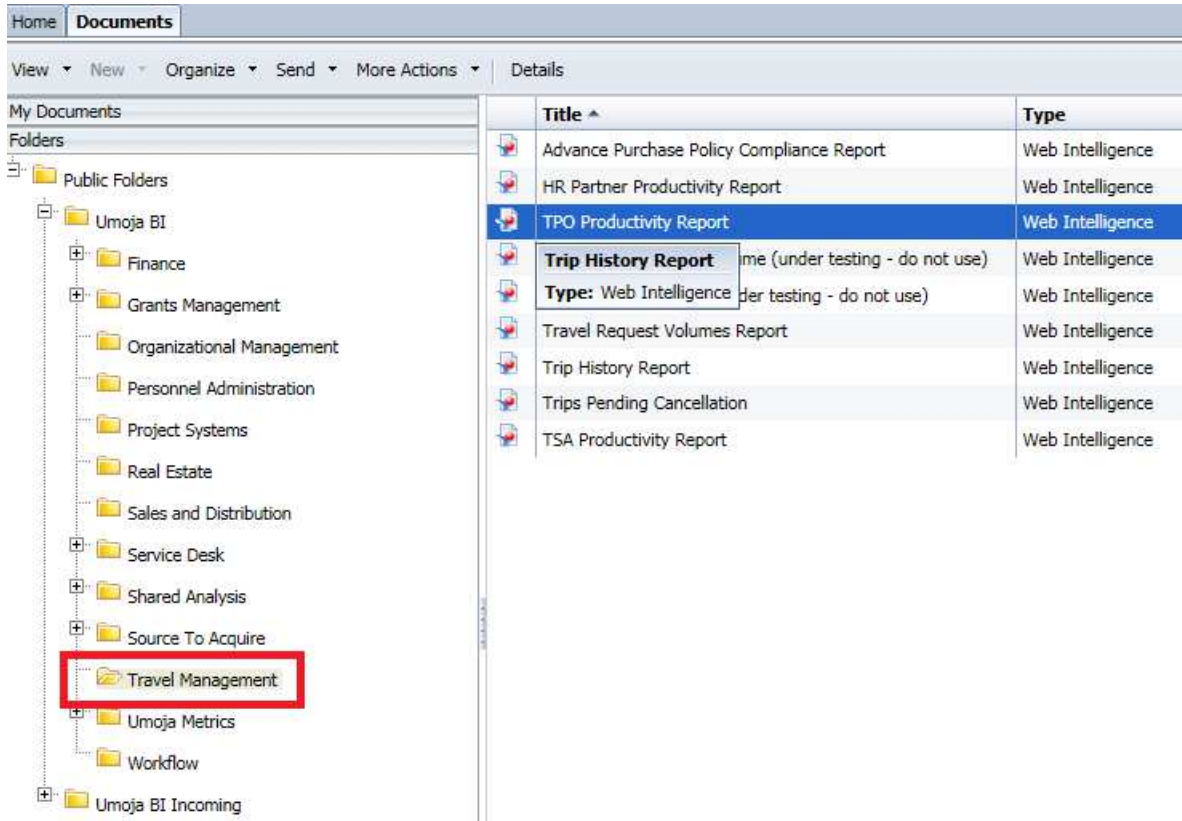
1. Log in to Citrix: <https://login.umoja.un.org/Citrix/SAPVA/site/default.aspx>
2. Go to the icon called "Umoja Production".



3. Click on the BI Portal.



4. Open the **Travel Management** folder. Choose the TPO Productivity Report and double-click on the link to open it.



The screenshot shows a file explorer interface with a left pane for 'My Documents' and a right pane for 'Details'. The left pane shows a tree view of folders under 'Umoja BI', with 'Travel Management' highlighted by a red box. The right pane shows a table of reports.

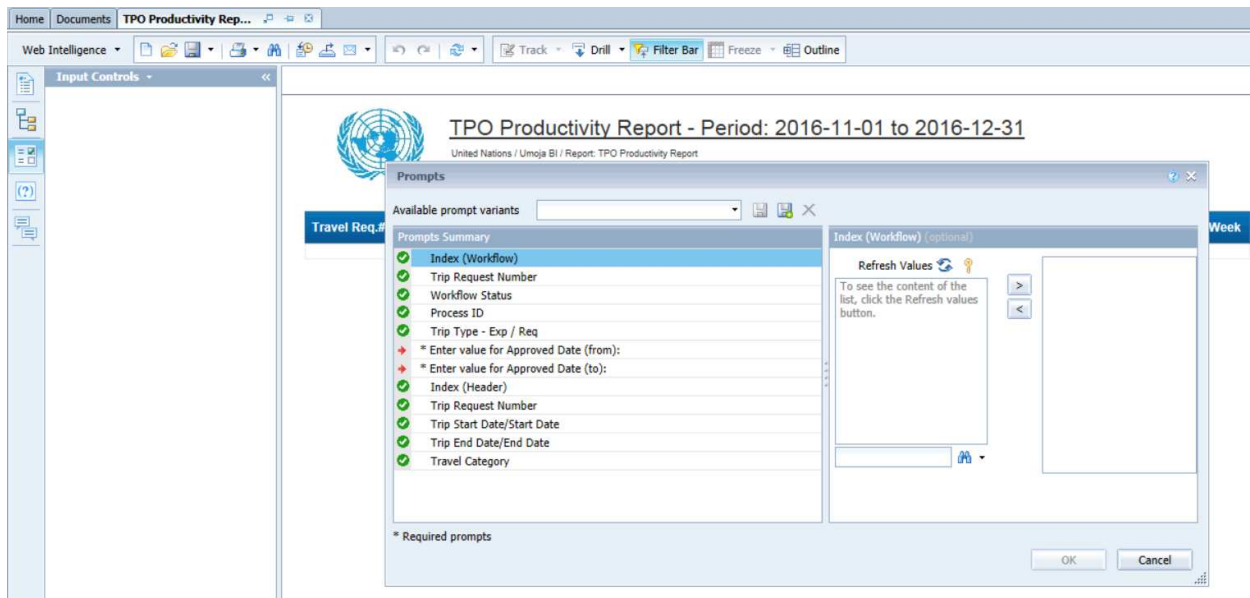
Title ^	Type
Advance Purchase Policy Compliance Report	Web Intelligence
HR Partner Productivity Report	Web Intelligence
TPO Productivity Report	Web Intelligence
Trip History Report (under testing - do not use)	Web Intelligence
Type: Web Intelligence (under testing - do not use)	Web Intelligence
Travel Request Volumes Report	Web Intelligence
Trip History Report	Web Intelligence
Trips Pending Cancellation	Web Intelligence
TSA Productivity Report	Web Intelligence

B. Prompts – First Level of Filtering

1. As soon as you open the report, the Prompts window will display. For this report, approved date is a required entry as denoted by the asterisk in front of “Enter value for Approved Date (from)” and “Enter value for Approved Date (to)” prompts. You can select a single date (enter same date in both the from and to prompts) or multiple dates to see productivity by a particular day or time period respectively.

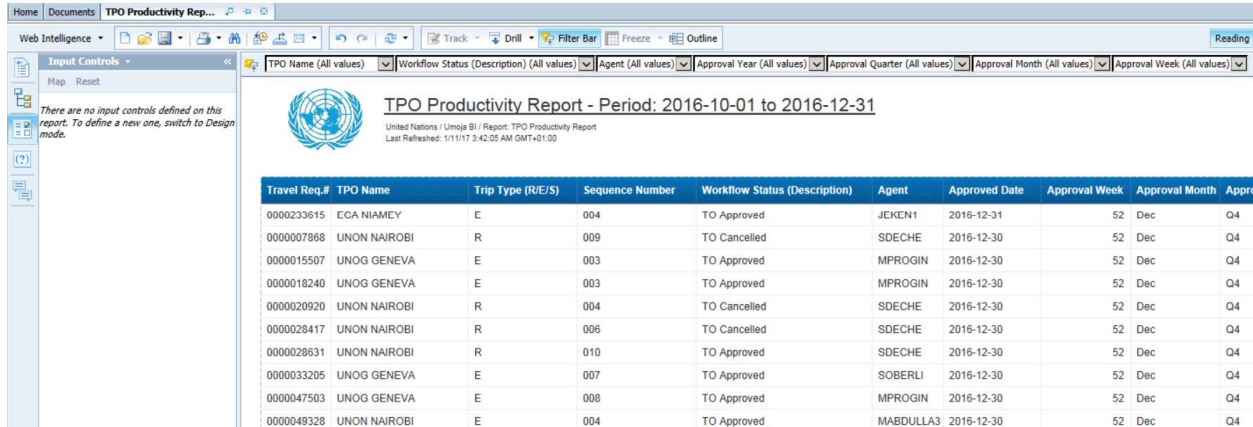
The other 10 fields in the Prompts window are optional. You may or may not select any values for the following fields:

- Index (Workflow or Header)
- Trip Request Number (Workflow or Header)
- Workflow Status
- Process ID
- Trip Type- Expense/Request
- Trip Start Date/Start Date
- Trip End Date/End Date
- Travel Category



BI Travel Report: Travel Processing Office (TPO) Productivity Report

2. After entering the required and any optional values, click OK and the report will run. In this example, the report has pulled in all travel requests as well as their historical and latest workflow statuses, including the User ID of the agent who worked on a particular step, for the period of Q4 2016.



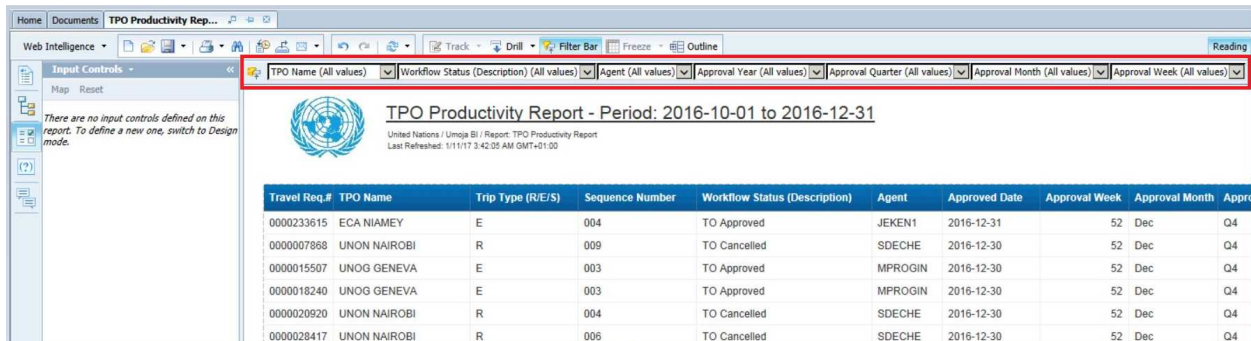
Travel Req.#	TPO Name	Trip Type (R/E/S)	Sequence Number	Workflow Status (Description)	Agent	Approved Date	Approval Week	Approval Month	Approval Year
0000233615	ECA NIAMEY	E	004	TO Approved	JEKEN1	2016-12-31	52	Dec	Q4
0000007868	UNON NAIROBI	R	009	TO Cancelled	SDECHE	2016-12-30	52	Dec	Q4
0000015507	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	Dec	Q4
0000018240	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	Dec	Q4
0000020920	UNON NAIROBI	R	004	TO Cancelled	SDECHE	2016-12-30	52	Dec	Q4
0000028417	UNON NAIROBI	R	006	TO Cancelled	SDECHE	2016-12-30	52	Dec	Q4
0000028631	UNON NAIROBI	R	010	TO Approved	SDECHE	2016-12-30	52	Dec	Q4
0000033205	UNOG GENEVA	E	007	TO Approved	SOBERLI	2016-12-30	52	Dec	Q4
0000047503	UNOG GENEVA	E	008	TO Approved	MPROGIN	2016-12-30	52	Dec	Q4
0000049328	UNON NAIROBI	E	004	TO Approved	MABDULLA3	2016-12-30	52	Dec	Q4

Note that data is refreshed in BI every 24 hours from ECC. This report displays a time stamp indicating the date and time data was last refreshed just underneath the title.

C. Filter Bar – Second Level of Filtering

1. Upon running the report, you can see the filter bar at the top (red rectangle in the screen shot below). The report has 7 basic selection parameters available through the Filter Bar. Select the desired value from among the following fields utilizing the drop down menu for each filter.

- TPO Name
- Workflow Status
- Agent
- Approval Year
- Approval Quarter
- Approval Month
- Approval Week

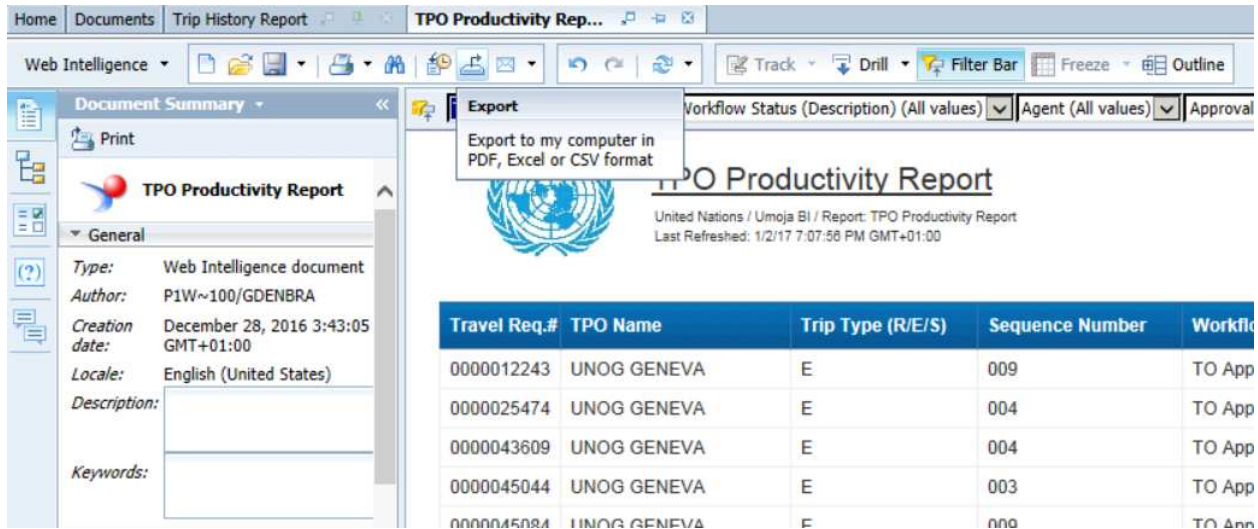


The screenshot shows a web application interface for a TPO Productivity Report. At the top, there is a filter bar with seven dropdown menus: TPO Name (All values), Workflow Status (Description) (All values), Agent (All values), Approval Year (All values), Approval Quarter (All values), Approval Month (All values), and Approval Week (All values). Below the filter bar, the report title is "TPO Productivity Report - Period: 2016-10-01 to 2016-12-31". The report includes a table with the following data:

Travel Req.#	TPO Name	Trip Type (R/E/S)	Sequence Number	Workflow Status (Description)	Agent	Approved Date	Approval Week	Approval Month	Approval Year
0000233615	ECA NIAMEY	E	004	TO Approved	JEKEN1	2016-12-31	52	Dec	2016
000007868	UNON NAIROBI	R	009	TO Cancelled	SDECHE	2016-12-30	52	Dec	2016
0000015507	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	Dec	2016
0000018240	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	Dec	2016
0000020920	UNON NAIROBI	R	004	TO Cancelled	SDECHE	2016-12-30	52	Dec	2016
0000028417	UNON NAIROBI	R	006	TO Cancelled	SDECHE	2016-12-30	52	Dec	2016

D. Export Report and Analysis Example

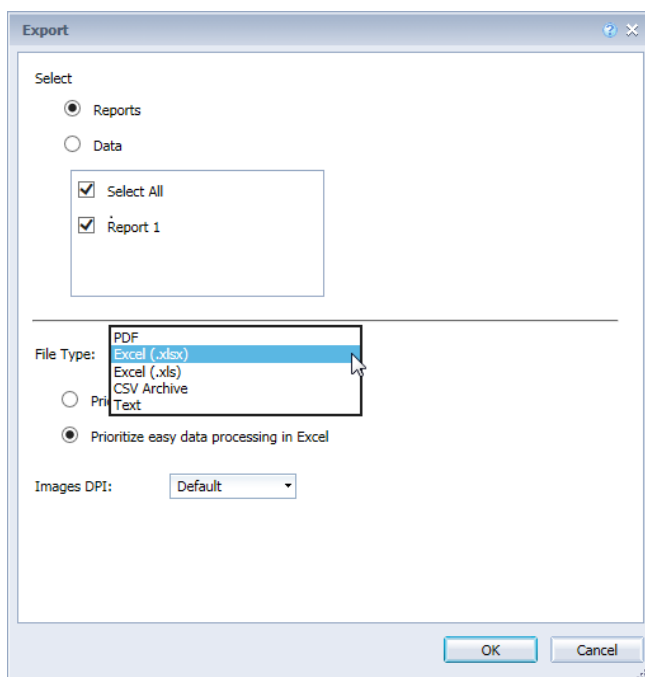
1. You can export the report to Excel, PDF, CSV for text formats by clicking on the Export icon as seen below.



The screenshot shows a web application interface for a 'TPO Productivity Report'. On the left, there is a 'Document Summary' sidebar with fields for Type, Author, Creation date, Locale, Description, and Keywords. The main content area displays the report title, a UN logo, and a data table. An 'Export' menu is open, showing options to export to PDF, Excel, or CSV. The data table below has the following content:

Travel Req.#	TPO Name	Trip Type (R/E/S)	Sequence Number	Workflo
0000012243	UNOG GENEVA	E	009	TO App
0000025474	UNOG GENEVA	E	004	TO App
0000043609	UNOG GENEVA	E	004	TO App
0000045044	UNOG GENEVA	E	003	TO App
0000045084	UNOG GENEVA	E	000	TO App

2. In the Export dialog box that opens, make sure “Reports” radio button is selected and then choose the desired File Type format from the drop down menu. For exporting to Excel (.xlsx or .xls formats) the default is to prioritize data processing in Excel. You can also select image resolution from the drop-down for “Images DPI”.



The screenshot shows the 'Export' dialog box. It has a 'Select' section with radio buttons for 'Reports' (selected) and 'Data'. Below this are checkboxes for 'Select All' and 'Report 1'. The 'File Type' section has a dropdown menu with 'Excel (.xlsx)' selected. There are also radio buttons for 'Print' and 'Text', and a checked radio button for 'Prioritize easy data processing in Excel'. The 'Images DPI' section has a dropdown menu set to 'Default'. 'OK' and 'Cancel' buttons are at the bottom.

BI Travel Report: Travel Processing Office (TPO) Productivity Report

3. Click open or save to your computer from the bottom dialog pop-up.

Travel Req.#	TPO Name	Trip Type (R/E/S)	Sequence Number	Workflow Status (Description)	Agent	Approved Date	Approval Week	A
0000233615	ECA NIAMEY	E	004	TO Approved	JEKEN1	2016-12-31	52	D
000007868	UNON NAIROBI	R	009	TO Cancelled	SDECHE	2016-12-30	52	D
0000015507	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	D
0000018240	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	D
0000020920	UNON NAIROBI	R	004	TO Cancelled	SDECHE	2016-12-30	52	D
0000028417	UNON NAIROBI	R	006	TO Cancelled	SDECHE	2016-12-30	52	D
0000028631	UNON NAIROBI	R	010	TO Approved	SDECHE	2016-12-30	52	D
0000033205	UNOG GENEVA	E	007	TO Approved	SOBERLI	2016-12-30	52	D
0000047503	UNOG GENEVA	E	008	TO Approved	MPROGIN	2016-12-30	52	D
0000049328	UNON NAIROBI	E	004	TO Approved	MABDULLA3	2016-12-30	52	D
0000052284	UNSCO JERUSALEM	R	013	TO Partial Cancellation	AHJEJ	2016-12-30	52	D
0000060847	UNON NAIROBI	R	006	TO Cancelled	SDECHE	2016-12-30	52	D
0000062727	UNOG GENEVA	E	003	TO Approved	MPROGIN	2016-12-30	52	D
0000067818	UNODC CAIRO	E	005	TO Returned	JGARSANY	2016-12-30	52	D

4. Example: export to Excel (.xlsx) of the report for TPO UNHQ New York for period Q4 2016. TPO UNHQ New York was selected through the filter bar.

Travel Req.#	TPO Name	Trip Type (R/E/S)	Sequence Number	Workflow Status (Description)	Agent	Approved Date	Approval Week	Approval Month	Approval Quarter	Approval Year
0000119315	UNHQ NEW YORK	E	009	TO Approved	GTRAHAN	2016-12-30	52	Dec	Q4	2016
0000123845	UNHQ NEW YORK	R	008	TO Returned	RLEGASPI	2016-12-30	52	Dec	Q4	2016
0000172315	UNHQ NEW YORK	R	008	TO Approved	AVOUYOUK	2016-12-30	52	Dec	Q4	2016
0000187689	UNHQ NEW YORK	R	009	TO Approved	RLEGASPI	2016-12-30	52	Dec	Q4	2016
0000190493	UNHQ NEW YORK	E	003	TO Approved	KTAI1	2016-12-30	52	Dec	Q4	2016
0000200930	UNHQ NEW YORK	R	010	TO Returned	RLEGASPI	2016-12-30	52	Dec	Q4	2016
0000216710	UNHQ NEW YORK	E	004	TO Approved	KTAI1	2016-12-30	52	Dec	Q4	2016
0000244216	UNHQ NEW YORK	R	004	TO Approved	JVUKAS	2016-12-30	52	Dec	Q4	2016
0000245347	UNHQ NEW YORK	R	004	TO Approved	KTAI1	2016-12-30	52	Dec	Q4	2016
0000245409	UNHQ NEW YORK	R	008	TO Approved	KTAI1	2016-12-30	52	Dec	Q4	2016
0000245778	UNHQ NEW YORK	R	004	TO Submitted Lump Sum	KTAI1	2016-12-30	52	Dec	Q4	2016
0000245852	UNHQ NEW YORK	R	004	TO Approved	JVUKAS	2016-12-30	52	Dec	Q4	2016
0000246071	UNHQ NEW YORK	R	004	TO Approved	AVOUYOUK	2016-12-30	52	Dec	Q4	2016
0000246567	UNHQ NEW YORK	R	004	TO Submitted Lump Sum	KTAI1	2016-12-30	52	Dec	Q4	2016
0000247488	UNHQ NEW YORK	R	004	TO Submitted Lump Sum	KTAI1	2016-12-30	52	Dec	Q4	2016

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5. Following export as an Excel (.xlsx or .xls) file, you can conduct some analyses through the use of pivot tables in Excel (versions of Excel 2007 or higher are recommended to be used). As an example, create a pivot to view WF statuses by month (see below for WF statuses by month for TPO UNHQ New York during Q4 2016, along with a chart to visualize trends):

Approval Month/Quarter / WF Status	Count of Travel Req.#
Q4	8411
Oct	2144
Amendment Rejected	21
TO Approved	1783
TO Cancelled	82
TO Partial Cancellation	18
TO Rejected	38
TO Returned	164
TO Submitted Lump Sum	38
Nov	3953
Amendment Rejected	19
TO Approved	3246
TO Cancelled	328
TO Partial Cancellation	148
TO Rejected	25
TO Returned	136
TO Submitted Lump Sum	51
Dec	2314
Amendment Rejected	13
TO Approved	1732
TO Cancelled	72
TO Partial Cancellation	80
TO Rejected	6
TO Returned	154
TO Submitted Lump Sum	257
Grand Total	8411

