Overview of ReportMart3
2008 Upgrade

July 2008
Agenda

• Upgrade Project Overview
• How to Use the New ReportMart3
• Demo
• Getting Help
• Demo for Macintosh users only
Upgrade Project Overview
Upgrade Project Overview

• New ReportMart3 Go-Live date: *July 14, 2008*

• Business Objects has upgraded to version XI (BOXI) and will discontinue support of our current version (BO6.5) by 12/31/08

• Stanford BOXI project team worked on the following:
  – Portal customizations
  – Report migration
  – Testing
Upgrade Project Overview (cont.)

- **Portal Customization Process**
  - Reviewed current BO6.5 customizations
  - Compared to BOXI “out of the box”
  - Gave a demo to Reporting Strategy Group (senior representatives from schools/business units and central offices)
  - Got feedback on needed customizations
  - Agreed upon scope

- **Report Migration Process**
  - Obtained usage stats for current reports
  - Business Owners determined which to retire (please see notes section)
How to Use the New ReportMart3

The Business Objects XI (BOXI) Interface
BO6.5 vs BOXI

- What’s the same
  - URL: reportmart3.stanford.edu
  - Access and authority
  - Reports organized into the same Categories as before
  - Report search box
  - View details available (toggle on or off via arrow)

- Disabled reports grayed out w/ info icon
BO6.5 vs BOXI

- **What’s the same (continued)**
  - Recommended settings by report type
    - PDF for Desktop Intelligence reports
    - HTML for Web Intelligence reports
    - See →
  - Which prompts to enter
  - Prompt edits (on reports that have them)
  - Report outputs (look and feel)
  - Report tab selector
  - Ability to save as Excel and PDF (different interface)
    - Appears as a Excel icon on upper right portion of screen
  - Ability to switch between HTML and PDF mode
BO6.5 vs BOXI

• **What’s different**
  – Macintosh users will login using Connect
    • [https://connect.stanford.edu](https://connect.stanford.edu)
  – Home page interface (location of items)
    • Broadcast messages
    • New/Revised reports (instead of icons)
    • Links for Hardware/Software/Browser requirements, FinGate, Training, and HelpSU
  – Report Help
    • Each report will have “daily” or “real-time” icon
    • Report Sample and Instructions are separate PDF documents
      – When searching by report name or number they will appear with report(s)
      – No more Prompt Sample document
BO6.5 vs. BOXI

• What’s different (continued)

• Help documents are shown as links, as well as report titles

  Organization of reports
  • Folders
    – By access group: OF, OF/LD
    – My Folders/Favorites
  • Categories
    – Corporate Categories (formerly University Reports)
    – Personal Categories (formerly Personal Reports)
BO6.5 vs. BOXI

• What’s different (continued)

  – Reports launch in a new window
    • Can return to ReportMart3 Home Page and launch a *different* report
      (can run two different reports simultaneously)
    • *Cannot* run the same report with different prompts

  – Blank report displays next to Prompt window
    • Allows for confirmation that user selected the right report

  – Prompt interface is consistent across reports types (Webi or Deski),
    but offers two ways to enter prompt values:
    • Basic Prompts (free form entry, no List of Values)
    • Advanced Prompts (select prompt value using LOV)
BO6.5 vs. BOXI

- New features

  - Ability to save prompt values
    - This creates a *copy* of the report
    - Note - if the report is updated for a bug fix or an enhancement your saved version is *not* updated!
    - Make sure the report is in HTML view mode (not PDF)
    - To save prompts:
      - Run the report
      - Ensure that you’re in HTML mode
      - Click Document/Save As (see →)
      - Choose Favorites
      - Select an appropriate report name (see Notes)
      - Click “OK”
    - Your Favorites folder can be in “My InfoView”
      - One-time set up required (next slide)
BO6.5 vs. BOXI: Favorites

- My Reportmart has been replaced by the functions of My InfoView and Favorites
- Add shortcuts and saved reports to Favorites
- Click on My InfoView icon to access
- Setting up My InfoView (only required first time):
  - Click on My InfoView icon
  - Window appears with Define Content in upper center
  - Click on Define Content; this popup window appears
  - Choose object button and Favorites folder; click OK
  - Popup disappears; on displayed window click Save in upper right
BO6.5 vs. BOXI: Home Page Differences

- Home
- My Reportmart
- Search
- Preferences (Options)
- Logout
- Informational links
Instructions and Sample

**Stanford University Reporting:**
*Transaction Detail Report*
FIN_EXP_279_Transaction_Detail

**Job Aid:** For information on working with WEBI reports, please refer to the document at the following link:
https://docushare.stanford.edu/Get/File-41751/41751_WEBI_Reports.pdf
For information on the crosswalk between old and new expenditure reports, please refer to the document at the following link:

**Report Last Revised: 26-Jun-2006**

**Report Description:**
The Transaction Detail report provides transaction detail and JCC level salary expenditure information by Project, Task and Award, for a requested period.

* Authority required: Salary or Non-Salary Report View.
* Frequency of Data Update: Previous Day.

<table>
<thead>
<tr>
<th>Tab Title</th>
<th>Tab Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1) Transaction Detail</td>
<td>Provides a formatted report that includes expenditure transaction details.</td>
</tr>
</tbody>
</table>

- Available now as a separate document
- Prompt sample has been discontinued
Basic Prompts

- BO6.5 on left; BOXI on right
- Values must be typed, not chosen from a List of Values
- Report sample appears in window at right
- No List of Values (LOVs) offered
- Run button at top (if you scroll down and the Run button disappears, you can press the Enter or Return key on your keyboard/pad for the same effect)
- Go directly to Advanced Prompts if you are going to use LOVs
Advanced Prompts

- Used for selecting from LOVs (list of values)
- Note Run button in Advanced window
- Enter or Return on keyboard is equivalent to the Run button
- Ignore Run icon in upper right
Print function same as BO6.5
Save function same as BO6.5 (except for Mac users)
Note prompt window to the left
Use View HTML button for saving reports with prompt values
Report Layout Page—HTML

- Note View PDF button is center-right
- Tab Select is right of View PDF
- Save prompts only in HTML mode
- Drill icon in upper right (for 280 and 281 reports)
What’s Next

• **Coming in the future**
  – Ability to schedule reports to run automatically
  – Intend to pilot with Budget Officers by year end
Macintosh Settings

- Use Connect: https://connect.stanford.edu
- You will need to install the Citrix software if you’re using Connect for the first time:
- Saving to your personal desktop requires that you select C$ on ‘Client’ (V:)
- Job Aids available on connecting, navigating and saving
Getting Help

• HelpSU (helpsu.stanford.edu)