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Article Objectives
In this article, you will learn how to:

- Run an ART Report for your provider(s).
- Successfully navigate in ART.
- Gain a basic understanding of what ART is capable of reporting.

Reasons to Use ART
Bowman Systems has successfully partnered with Business Objects, a business intelligence platform that powers the management and secure deployment of specialized end-user tools for reporting, query and analysis, performance management, and analytic applications on a proven, scalable, and open services-oriented architecture to provide our clients with an Advanced Reporting Tool (ART). ART enables us to pull your database transactional information from ServicePoint into an easy to use, GUI based platform.

ART alleviates the need for a VPN connection, mapping columns into Crystal Reports, running data dumps, and/or transferring each table into Microsoft Excel. ART eliminates secondary processes and brings the ServicePoint data right to your desktop.
Types of Licenses

There are two types of licenses available in ART; the Report Viewer License and the Adhoc Reporting License. For the purposes of this training we will be covering the Report Viewer License.

**The Report Viewing License**

This license allows Users to view reports that have been generated by Adhoc Reporting Users. Report Viewing Users may select or enter criteria for reports with prompts (or parameters for those familiar with Crystal Reports terminology), such as start date, end date, target provider, effective date, etc. which were defined by the Adhoc Reporting User.

This license does not allow the creation of a report; it only allows modification of reports via the prompts to suit their needs, and to run and view them.

The Report Viewing License is ideal for Users who need complex reports, but do not have experience with ServicePoint's ReportWriter.
Accessing the Tool

When your account is setup to access ART, you must wait one day for the license information to transfer to the ART server during the regularly scheduled nightly ART build. If, after one day, you are unable to access ART, please contact your Homeless Management Information System (HMIS) Administrator.

To access ART users can click on either the ART Message link in the upper right of the screen, or on the Reports module link on the left hand side and click on ART. (See Figure 1)

**ART Messages**

There are four messages that can appear in the upper right of the screen. (See Figure 2)

- Connecting – Connecting your ServicePoint license to the ART database.
- Connected – You are connected to the ART database and can view/create reports.
- Unread Messages – You have used the Scheduled Reports option and have downloaded reports waiting to be read.
- Error - If a user receives an Error message there are several possibilities:
  - If this is a newly assigned license they will need to wait until the next ART build to access ART.
  - Possible internet connection instability. Log out of ServicePoint, close your browser, check your internet connectivity, and log back into ServicePoint.
  - If the above solutions don’t work, the ART servers may be down. Please contact your Customer Support Specialist for additional help.
  - Manual password reset. If the password has been reset manually for a user they will not be able to access ART until the next business day.
WEB INTELLIGENCE INTERFACE

The ART default screen is shown below. This screen will be visible after your click the Advanced Reporting Tool link. ART is divided into two sections; ART Browser and Scheduled Reports. (See Figure 3)

![Advanced Reporting Tool](image)

**Figure 3**

ART folders are handled with three security settings: User-Specific Files, Bowman Systems Secure Files, and Public Files.

The ART Browser contains the following items (1):

- **Inbox**: This folder contains the resulting reports from a scheduled report.
- **Available Reports and Templates**: This folder contains all reports created and published by Bowman Systems. Users should not attempt to run reports from this folder, as a User with Ad Hoc privileges must first map ART reports for use.
- **Bowman Systems Resources**: This folder contains any documents associated with report building and is recommended for Ad Hoc users.
- **Public Folder**: This folder will contain all the reports that a User with a ART Viewer License can run.

The Scheduled Reports section contains the following: (2)

- **Scheduled Reports**: Any reports that are scheduled to run will be displayed this in this area.

At the bottom of ART will be a display of the last Warehouse Build. This the point in time in which the ART database will match the ServicePoint database (3).
Navigating Folders In ART

Expand & Collapsing folders

1. Click on the ▼ icon next to the folder you wish to expand (1). You only need to click this icon once; do not double click. (See Figure 4)

![Figure 4](image1)

2. A message will appear at the top of your screen indicating that ART is processing the folder for viewing (1). (See Figure 5)

![Figure 5](image2)

3. After a few seconds, the ▼ will turn to a ▲ and the folder will expand to display the sub-folders contained within (1). (See Figure 6)
4. Use the **First**, **Previous**, **Next**, or **Last** buttons to navigate multiple pages within a folder (2). Each page can display 20 documents.

5. All of the reports available to that folder will be displayed indented under the folder icon (1). (See Figure 7)
Running An ART Report

1. Once you are in the folder that contains the report you need, click on the magnifying glass icon to the left of the report you wish to run. (1). (See Figure 8)

![Figure 8](image1)

2. A pop-up will display. Click the View Report button to run the report (1). To cancel out of the screen, click the red X icon (2). (See Figure 9)

![Figure 9](image2)

3. A new window will display, and the report will begin building.

4. A window displaying the various prompts for the report will display.

![Figure 10](image3)

5. To edit the date for a prompt, either enter it in the space provided (using mm/dd/yyyy format) (1) or click on the calendar icon to the right (2). (See Figure 10)
6. For some prompts you will have the option of selecting objects from a list. If a list is not present, click the “Refresh Values” link (1). (See Figure 12)

7. To select a value to include in the report, click the value in the left window (1). Hold the CTRL key to select more than one value at a time, or hold the SHIFT key to select multiple values at once. (See Figure 13)
8. With your value highlighted, click on the arrow icon pointing to the right (1). (See Figure 14)

9. Your value will move to the right window and is now included in the report. To remove it, highlight the value in the right window (1) and click on the left arrow (2). (See Figure 15)

10. Note that if you do not have all the prompts answered, the “Run Query” button will be grayed out and unclickable (1). Red arrows will help point out which prompts need responses in order for the report to run (2). (See Figure 16)
11. Click the “Run Query” button.

12. A loading animation will be displayed, signaling the report is being built around your prompt responses. (See Figure 17)

13. Once the animation is complete your report will be displayed. (See Figure 18)
Enter Data As in ART 3x

In the ART 3x platform, EDA is implemented by a forced prompt that appears in all reports. If a user does not have EDA for other providers they will still have a prompt; the only values that will appear will be their default provider.

By default, EDA will always pick the default provider the user was created at. EDA in ART will disregard any current EDA selection in a user’s current ServicePoint session.

EDA – Unindented Prompt

An unindented EDA Provider prompt will generally be the first prompt in any ART report regardless of the ART universe used. The provider used in this EDA prompt will enforce the EDA rules seen in ServicePoint, and all report results will correlate to this EDA provider’s visibility settings.

Figure 19

- Click on the EDA Provider prompt (1). (See Figure 19)
- Click on the Provider you wish to use as the EDA Provider (2).
- Click on the right arrow icon to select the EDA Provider (3).
- **Note** you can only select one EDA Provider.
**EDA – Indented Prompt**

The indented EDA Provider prompt will display anytime there is a prompt object that is not a date object. It will display as a collapsible tabbed dropdown. All indented EDA Providers determine which values are shown in the prompt list. They do not affect report results.

![EDA Provider Prompt](image)

**Figure 20**

**IMPORTANT**

It is only necessary to change the indented EDA Providers from “Default” if the values necessary for the report are not available.

- Click on the EDA Provider prompt (1) (See Figure 20).
- Click on the Provider you wish to use as the EDA Provider (2).
- Click on the right arrow icon to select the EDA Provider (3).

**Note** you can only select one EDA Provider.

**EDA Additional Information / Summary**

- The un-indented "EDA Provider" is used to determine how the user wants to see the data presented in ART. If the user workflow involves using "Enter Data As" in ServicePoint, then the user should use the un-indented "EDA Provider" in ART to "mimic" the same settings.
The indented "EDA Provider" prompts in ART located under other prompts are only needed if they don't see the needed value in the prompt above it. If they can find the needed value they do not need to alter the indented "EDA Provider" prompt. If they don't see the needed value then they can alter the indented "EDA Provider" prompt to get the needed value.

Leaving Default Provider as the selection will run the report as the user’s default login/Provider they were created at. It will not sync with live EDA selection in ServicePoint.

All EDA Prompts will need to be filled out each time a report is run. Unlike Effective Date, it does not remember prior entries.

Completing one EDA prompt will not auto-fill any other EDA prompts. Each must be completed independent of each other.

EDA will appear for every object type in the Query Filter that is a prompt and not a Date Object.

**What EDA Means to You**

If you have to change providers to run your monthly reports in ServicePoint (for example, the Client Served and the HUD 40118 APR), you may need to change providers in ART to reflect the same client securities.
Navigating the ART Reports

1. The toolbar at the top of the report contains many options. (See Figure 21)

![Figure 21](image1)

2. Click on the arrow next to Document to open up your “Save as” options (1). (See Figure 22)

![Figure 22](image2)

3. Click on the arrow next to View to open up your view options. (See Figure 23)

![Figure 23](image3)

4. Click on the arrow next to the percentage box to modify the zoom of your view (1). To go to the next page inside a tab of your ART report, use the left and right arrows (2). (See Figure 24)

![Figure 24](image4)

5. Clicking “Find” opens a new menu on the left hand side of the screen (1). This will allow you to search the document for particular characters, numbers, etc. (See Figure 25)
6. The window on the left hand side of the screen has four different functions at the bottom: Navigation Map (1), User Prompt Input (2), Input Controls (3), and Find (4). Click on the field to open up the drop down menu. (See Figure 26)

7. Below are screenshots of the Navigation Map, User Prompt Input, and Find window options. Note that options may vary in each report. (See Figure 27)
8. Navigation Map allows you to see the overall outline of your report, if your report contains multiple tabs.

9. User Prompt Input allows you to re-run the report with different prompt values. When you are finished editing the values, click the Run icon.

10. Find allows you to find particular text inside the report tab you are currently on.

11. Input controls vary on each report, and may not be available in all ART reports. Input controls allow you to manipulate data that was pulled within the parameters of the report’s prompts. See the reports documentation for further explanations. In the example screenshot below, this input control would allow us to only view clients with a particular Entry Exit date. (See Figure 28)

12. Certain reports will utilize a feature call Drill Filter. The Drill Filter is located at the top of a report tab. Drill Filters can vary depending on the report, and are not always used. See the reports documentation for further explanations. In this example we can use the Drill filter to look for a particular Client Uid. (See Figure 29)
13. Reports can have multiple tabs that contain different sub-queries or sets of data. To access these, click on the report tabs located at the bottom of the screen (1). (See Figure 30)

14. To re-run the same report with different responses to the prompts, click on the “Refresh Data” link in the upper right hand corner (1). (See Figure 31)
Saving and Printing Reports

Saving

1. Click on the Document dropdown arrow and navigate to the format you wish to save to. (See Figure 32)

![Figure 32](image)

2. A new window will display. Click either “Open” or “Save”. (See Figure 33)

![Figure 33](image)

Printing

1. Click on the Print Icon (1). (See Figure 34)

![Figure 34](image)

2. Click either “Open” or “Save”.
3. From there go to File → Print in the PDF file.

IMPORTANT

If the browser Pop-Up blocker is disabling Saving or Printing, hold the CTRL key on your keyboard throughout the entire Save or Printing process.
Scheduling ART Reports

How to Schedule ART Reports

1. Once you are in the folder that contains the report you need, click on the magnifying glass icon to the left of the report you wish to run. (1) (See Figure 35)

2. A pop-up will display. Click the Schedule Report button to run the report. (1) (See Figure 36)

3. A new window will display with prompts for the scheduling information. (See Figure 37)
4. Click on the Select button to pick your EDA Provider, if needed. (1) (See Figure 38)

![Figure 38](image)

5. Enter your Provider name in the Search area (1) and click the Search button (2).

6. In the Search Results, select the Provider using the + icon (3). If you need to remove a value, click on the - icon (4).

7. Once the selections have been made, click Submit. (5)

8. Click on the next prompt item to edit. In this report example a date prompt is selected. (See Figure 39)

![Figure 39](image)
9. To edit the date for a prompt, either enter it in the space provided (using mm/dd/yyyy format) \((1)\) or click on the calendar icon to the right \((2)\).

   a. To use the current date and time, click on \(\) the icon.

10. Once you have finished all of your prompts, click the **Next** button. \((3)\)

11. You are now on the Scheduling screen. If necessary, rename the schedule report as it will be displayed in the Users inbox. \((1)\) (See Figure 40)

![Schedule Report](image)

**Figure 40**

12. Choose the **Report Format** either PDF or Excel \((2)\).

13. Clicking on the **My User** icon will default the report to schedule for your inbox. To schedule the report for another users inbox click on the **Search button** \((3)\). (See Figure 41)
14. A pop-up will display. Click on the + Icon for the user you wish to schedule the report for (1). Or you can search for the user in the User Search field (2).

b. Only one user can be selected at a time.

15. Pick the intervals at which the report should run. (1) (See Figure 42)

16. Then depending on your interval you will have different frequencies. (See Figure 43)
17. Select your interval and frequency of reporting (1), and input a date range so that the scheduled report will run within (2). (See Figure 44)

There are several options available when using the interval option.

- It is possible to run a monthly report every 3 months, if the scheduled Start and End date are long enough.
- You can schedule a report to run daily every other day using the “Run Every 2 Day” frequency.
- Note that the Report date range and the Schedule date range are independent of each other. If a report utilizes a date range prompt you may need to change the dates based upon your reporting needs.

18. Once you have selected the criteria to schedule the report Click **Send to Inbox** (3).
Scheduled Reports Screen

The ART default screen is shown below. This screen will be visible after your click the Send to Inbox link. ART is divided into two sections; ART Browser and Scheduled Reports. (See Figure 45)

![Scheduled Reports Screen](image)

Figure 45

1. The Status of the report will be in the far right column. (1)
   a. There are four statuses: Pending, Running, Completed, and Failed.
      i. Failed can occur if the prompts are incorrect, if the report contacts broken or incorrect query filters or formulas, or if there are server issues.

2. To delete a scheduled report, click on the icon to the far left. (2)

3. To refresh the list, click the Refresh button. (3)

4. Once a report has been run, ART will display “Unread Messages” in the ART message area. (1) (See Figure 46)

![Advanced Reporting Tool](image)

Figure 46

5. To view your scheduled report, navigate to your Inbox and click on the icon next to the report. (2) (See Figure 46)

6. This will open the ART Item Details Menu (See Figure 47)
Figure 47

- Use the **Download** button to download the PDF/Excel report.
- Use the **Mark as Read** button to unbold the report and remove the “Unread Messages” ART Message.
  - This can also be accomplished by using the **Download** button.
- The **Rename**, **Copy**, and **Delete** functions work just like the Edit Report options.

7. Any report that has completed its scheduled runtime will be listed as Complete in the Scheduled Reports area. (3) (See Figure 48)
ART VIEWER LICENSE SUMMARY

Quick Tips

- Whenever you need to Save or Print, hold the CTRL key through every prompt until either the Save or the Print job is complete.

- “Effective Date” is the same as your “Assessment Date” in ServicePoint. And the “Assessment Date” is what turns on or off your Back Date Mode. So when you run your reports, think of “Effective Dates” as “the data on these clients assessments and sub-assessments are effective as of this date”.

- ART Report results are always one day behind any changes you make in ServicePoint. So if you ran a report today, any changed you did today in ServicePoint would not show in an ART Report.