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I. How do I access BI launch pad General Ledger reports?

General Ledger (GL) reports are Business Objects reports and are available through BI launch pad. You can find BI launch pad login links at the following websites:

- **VUMC Finance:** [https://finance.mc.vanderbilt.edu/](https://finance.mc.vanderbilt.edu/)
- **eBiz:** [http://www.vanderbilt.edu/ebiz/](http://www.vanderbilt.edu/ebiz/)
- **Direct link:** [https://enterprisebi4.mis.vanderbilt.edu/BOE/BI](https://enterprisebi4.mis.vanderbilt.edu/BOE/BI)

**Steps:**

1. BI launch pad uses Vanderbilt’s single sign on system. If you are not already logged on, enter your VUNetID and ePassword.

   **Note:** Make sure that the authentication is set to Windows AD.

   ![BI launch pad login screen](image)

2. The default landing page for all users will be the **Documents** tab with **Corporate Categories** expanded showing all BI launch pad universes to which you have access.

   **Note:** If you land on the Home tab, simply click on the Documents tab and navigate to Categories.
II. How do I navigate the Documents tab?

1. Select ‘General Ledger’ from the list of available universes.

2. The larger General Ledger folder includes subfolder categories including Contract and Grant Reporting, Financial Reporting and Transactional. Select the correct category based on the information you need.

Note: See Section XI for details regarding the Report Inventory spreadsheet for more information on GL Reports and Categories.
3. Once you have selected a subfolder, the list of available GL documents within that subfolder will appear in the Documents window.

**Note:** BI launch pad uses the term ‘Documents’ when referring to the list below. Once a Document is generated, individual tabs within the Document are referred to as ‘Reports.’ Use this terminology when navigating, saving, or printing from BI launch pad.

### III. How do I run General Ledger Documents?

Documents have unique prompts that must be entered to run each specific Document. As an example, below are the steps to run the **Transaction Detail** Document. The **Transaction Detail** Document provides transaction details by Account, Fiscal Year and Report Period for given center(s), sumto(s), or division(s).

**Steps:**

1. Select ‘**Transactional**’ from the General Ledger Corporate Category in BI launch pad.
2. Scroll down the alphabetical list of Documents and double click ‘Transaction Detail’ to run the Document.

3. To display the Prompts when the Document opens,

   (a) Click ‘Advanced’ at the top left corner of the ‘User Prompt Input’ box;

   OR

   (b) Click on the ‘Refresh’ icon at the bottom right corner of the screen.
All prompts must have a green check mark ✓ indicating a value has been selected. The first three prompts on the **Transaction Detail** Document all default with a value of **N/A**. You are required to choose a value on only one of these prompts (Center, Sumto, or Division) and leave **N/A** as the value for the other two.

4. Click ‘**Enter value(s) for Center**’ to highlight it, and then enter the center number(s) for which you want to run the Document. You may select more than one center number if desired. Use the arrow ➡ to select. You may also use the search box at the bottom to search for a center using the first few digits of the center number followed by an *.

5. Once a value is selected, click **N/A** and use the arrow ← to remove this value.
6. To run the Document by Sumto or Division, click the appropriate prompt. Use the arrow to select once your choice is entered or highlighted.

7. Click ‘Enter value(s) for Fiscal Year’, and select the desired fiscal year. Use the arrow to select the chosen fiscal year. You may select more than one fiscal year if desired.
Once all prompts have a green check mark ✔, you may run the Document (see Step 10). Other optional prompts for this Document are demonstrated below. “All” is the default for the three remaining prompts unless altered.

7. Click ‘Enter value(s) for Report Period’ to designate a specific report period. The Document will run for all report periods by default unless specifically designated here. Click to select your desired report period, and use the arrow → to select your choice.

8. Click ‘Enter value(s) for Account (Start)’ or ‘Enter value(s) for Account (End)’ if you wish to limit the Document to show a limited range of account numbers.

9. Click OK when ready to run the Document.
IV. How do I work with a Document once generated?

Once a document has been generated and displayed in the right panel based on the selection criteria, BI launch pad provides many functions for working with the Document.

Steps:
1. When the Document is displayed, a series of buttons on the top and bottom of the Document are available for performing various functions.

2. Buttons from both menus are described below:

   - **Print**: exports the resulting file to a PDF for printing.
   - **Find**: use to search data within the resulting Document to find a specific item.
   - **Export**: export as a PDF, Excel, or CSV format to computer.
   - **Undo/Redo**: allows you to undo or redo the last action performed.
   - **Quick Display Mode/Page Mode**: Quick Display Mode displays in full page mode while Page Mode displays in a print view.
   - **Zoom**: zoom defaults to 100% and may be altered as desired.
   - **Refresh**: Brings up the user input boxes in order to generate a new Document; also enables the user to refresh a list of values within the prompt window. The Refresh in the lower right shows the amount of time since the report was last refreshed. BI launch pad will time out after 20 minutes of inactivity.
3. The **Navigation Map** displays the available tabs and section breaks of the Document making it easy to navigate between each section by simply clicking the desired section.

4. The ![icon] icon displays the **User Prompt Input** menu which may be used in lieu of bringing up an additional prompt box for defining values to run the Document.
V. How do I use Input Controls?

Input Controls enable you to save time by customizing the displayed Document to meet your needs without re-running the Document from the database. They are specific to the tab (Report) of the Document in which they are created.

1. **Input Controls** allow you to quickly display only desired criteria on the Document based on the dynamic selection criteria boxes that are checked or unchecked.

   ![Input Controls Example]

2. Unchecking “Select (All)” and then selecting only desired account numbers in the example below will quickly display only the desired account numbers without having to re-run the Document.

   ![Account Selection Example]
VI. How can I work with multiple Documents at the same time?

The Documents tab may be used to open multiple Documents in BI launch pad simultaneously. Each open Document will reside on its own tab at the top of the application.

Steps:


2. Open and run an additional Document from the existing menu, or navigate to a different universe in the Categories menu.
3. Once open, both Documents can be accessed using the tabs at the top of the application.

VII. How do I use hyperlinks within a Document?

Some Documents will include Hyperlinks to other Documents within BI launch pad.

1. Hyperlinks are displayed by blue text which when clicked, open and generate additional Documents.
2. Clicking the hyperlink opens a new Document. In this example, the **Transaction Detail** Document for the Duplicating and Xerox account is now open on an additional tab. Tabs may be closed by clicking the [X] in the right corner of the tab.

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### VIII. How do I Pin and Unpin Documents?

You may save time by pinning your frequently used Documents to your BI launch pad view. Once pinned, the Document tab will be available whenever you open BI launch pad enabling you to quickly enter prompts and run the Document.

1. Click the [Pin] icon to pin the Document to your BI launch pad view.

2. Clicking the [Pin] icon again will unpin the Document from your default view.
IX. How do I export and save Documents?

You may export and save Documents or reports in multiple formats including Excel, CSV and PDF.

1. Click the Export icon, hover over ‘Export Document As,’ and click on the desired format for exporting the Document.

2. Save the Document in the desired file location on your computer.

Note: Choose Export Document As to export the entire Document including all reports (tabs) and formatting. Choose Export Current Report As to export just the current report with all formatting. Choose Export Data to CSV to export all the query data with no formatting.

X. What are the most frequently used reports?

The following are some of the reports available in the GL universe. See Section XI for a link to the comprehensive BI4 (launch pad) Report Inventory spreadsheet.

- **Transaction Detail** - Provides transaction details by Account, Fiscal Year and Report Period for given center(s).
- **Transaction Summary** - Provides net transaction amount by Account, Fiscal Year, and Report Period for given center(s). Drills to the Transaction Detail report.
- **Center Account Variance – Med Center** - Provides actual project-to-date or fiscal year-to-date, as appropriate, vs. revised annual budget amount by Center and Account.
- **Center Account Variance – University** - Provides actual project-to-date or fiscal year-to-date, as appropriate, vs. revised annual budget amount by Center and Account.
- **Center Attributes by Center, Sumto or Division** - Provides current attributes for a given center.
- **Contracts and Grants - Charges in Unallowable Accounts on Federal Awards** - Provides transaction detail for any charges on federal awards in accounts that are deemed unallowable per federal and institutional policies.
XI. How do I find the Document I need?

The BI4 Document Inventory spreadsheet can be found in the Help Information category within the General Ledger universe.

The spreadsheet allows you to sort and/or search to find details on all existing general ledger documents.
XII. How can I request a new Document in BI launch pad?

New Documents may be requested if existing standard Documents and Input Controls are unable to provide the data needed. The documents and information necessary to request new Documents are located on the Business Objects website for the GL Universe at https://finance.vanderbilt.edu/fis/apps/business-objects.php.

Steps:

1. First determine the appropriate Contact for your new Document based on the GL Universe Report Contacts spreadsheet found on this website.

2. Next complete and email the BI4 GL Report Request Form to the appropriate contact to request your new Document.

* Follow the same sequence of steps if requesting modifications to an existing Document in BI launch pad.
XIII. Useful Links and Support

BI launch pad Quick Guide: 

BI launch pad Training Page: 

Business Objects Security Form: 