
White Paper

Crystal Enterprise 10 SharePoint Portal Integration Kit

Working with Reports in Excel, Word, and PDF Formats



Authors: Russell Aquino, Mike Chatfield

Audience: This document is intended for Information Consumers and Web Site Creators who want to know how to make use of the alternative format viewing options that are available in the integration kit.

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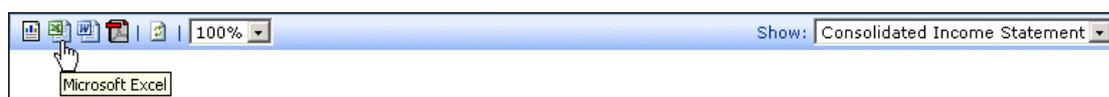
Viewing Reports

Alternative formats

The Crystal Enterprise 10 SharePoint Portal Integration Kit allows you to view your Crystal reports in different formats. If the necessary options are enabled by your Web Site Creator and your Crystal Enterprise administrator, you can view your reports in the following formats:

- As a Crystal report.
- As a Microsoft Excel spreadsheet.
- As a Microsoft Word document.
- As an Adobe Acrobat PDF.

You can view a report in these formats by clicking the corresponding buttons that are on the Report for You web part toolbar¹.



Real-time or scheduled reports

The reports that you choose to view in alternative formats can be one of two types:

- **A real-time version**
When you click to view the report, the SharePoint system communicates with Crystal Enterprise to retrieve and display the most up-to-date information from the report's data source.
- **A previously saved version**
When you click to view the report, the SharePoint system displays the most recently saved version of the report in Crystal Enterprise. This version contains information that was retrieved from the report's data source at an earlier scheduled time.

To identify which type of report is displayed when you click an alternative format viewing button, move your cursor over the button and view the tooltip.

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- If the tooltip displays the name of the alternative format, then clicking the button will display a real-time version of the report.
 - If the tooltip displays date and time information, along with the name of the alternative format, then clicking the button will display a previously saved version of the report. (The date and time on the tooltip indicate when the report was last saved in the format that you selected.)

The settings that are specified in Crystal Enterprise and in the Report for You web part determine whether you view a real-time version or a previously saved version of the report. For more information, see “Configuring Crystal Enterprise to Support Excel, Word, and PDF Viewing” on page 4 and “Configuring the Web Part to Support Excel, Word, and PDF Viewing” on page 5.

Configuring Crystal Enterprise to Support Excel, Word, and PDF Viewing

To allow Information Consumers to view reports in Excel, Word and PDF formats, Crystal Enterprise must be configured to provide the necessary rights and capabilities to the Information Consumers. The Crystal Enterprise administrator must consider two things:

- Whether or not to allow Information Consumers to view reports on demand.
- Whether or not to schedule reports to run in Crystal Enterprise. (The scheduled report instances will then be viewed by the Information Consumers.)

After the Crystal Enterprise system is configured, the Web Site Creator must then configure the Report for You web part to allow the Information Consumers to view the reports in alternative formats.

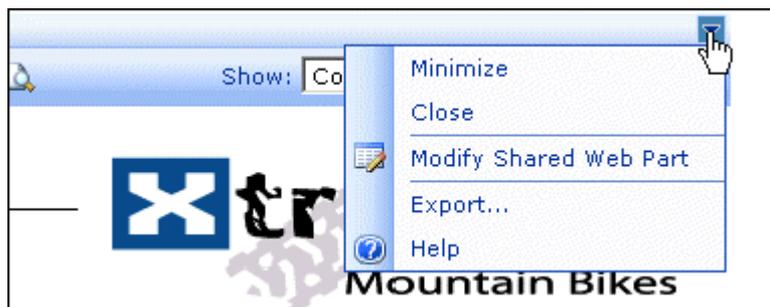
For information about configuring the Report for You web part, see “Configuring the Web Part to Support Excel, Word, and PDF Viewing” on page 5. To see how the Crystal Enterprise configuration and the Report for You web part configuration interact to allow Excel, Word, and PDF viewing, see “Verifying the Setup” on page 7.

Configuring the Web Part to Support Excel, Word, and PDF Viewing

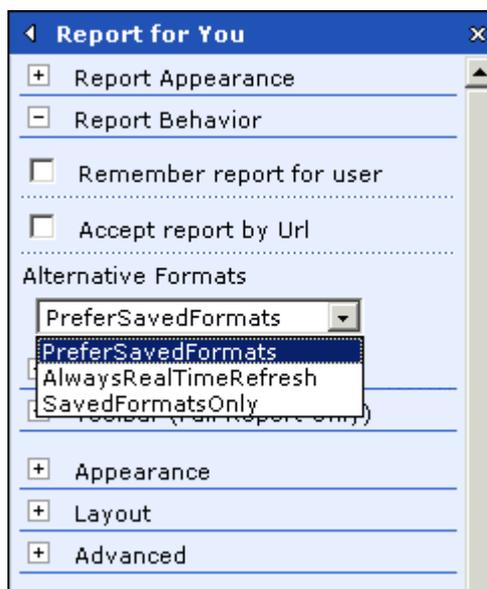
If you are the Web Site Creator or the person who is responsible for deploying the web parts in a SharePoint system, you can specify which version of the reports is displayed when Information Consumers click the alternative format viewing buttons: real-time versions or scheduled versions. To do this, you must modify the Alternative Formats property in the Properties pane of the Report for You web part.

To specify the Alternative Formats property:

1. In the Actions area of the page, click **Edit Page**.
The page reloads in Edit mode.
2. On the upper-right corner of the Report for You web part, click the **Web Part Menu** arrow.
The Web Part menu appears.



3. Select **Modify Shared Web Part**.
The Properties pane opens on the right side of the page.



4. Select an option from the **Alternative Formats** list.

- **AlwaysRealTime**

If you select this option, the reports that Information Consumers view in alternative formats will always display the most up-to-date information from the report's data source.

Note: The Information Consumers must have export rights and on-demand viewing rights for the reports in Crystal Enterprise; otherwise, the alternative format buttons will not appear on the web part toolbar, and the Information Consumers will not be able to view the reports in their chosen format.

- **SavedFormatsOnly**

If you select this option, the reports that Information Consumers view in alternative formats will always be previously saved versions. (For more information about previously saved versions of reports, see "Real-time or scheduled reports" on page 2.)

Note: If previously saved versions (scheduled instances) of a report are not available in Crystal Enterprise, then the alternative format viewing buttons will not appear on the web part toolbar, and the Information Consumers will not be able to view the report in their chosen format.

- **PreferSavedFormats**

If you select this option, the reports that Information Consumers view in alternative formats will always be previously saved versions (scheduled instances), unless previously saved versions of the reports are unavailable. If previously saved versions are unavailable, then the web part will communicate with Crystal Enterprise to retrieve and display the most current information from the data source of the reports (when the Information Consumer clicks one of the alternative format viewing buttons).

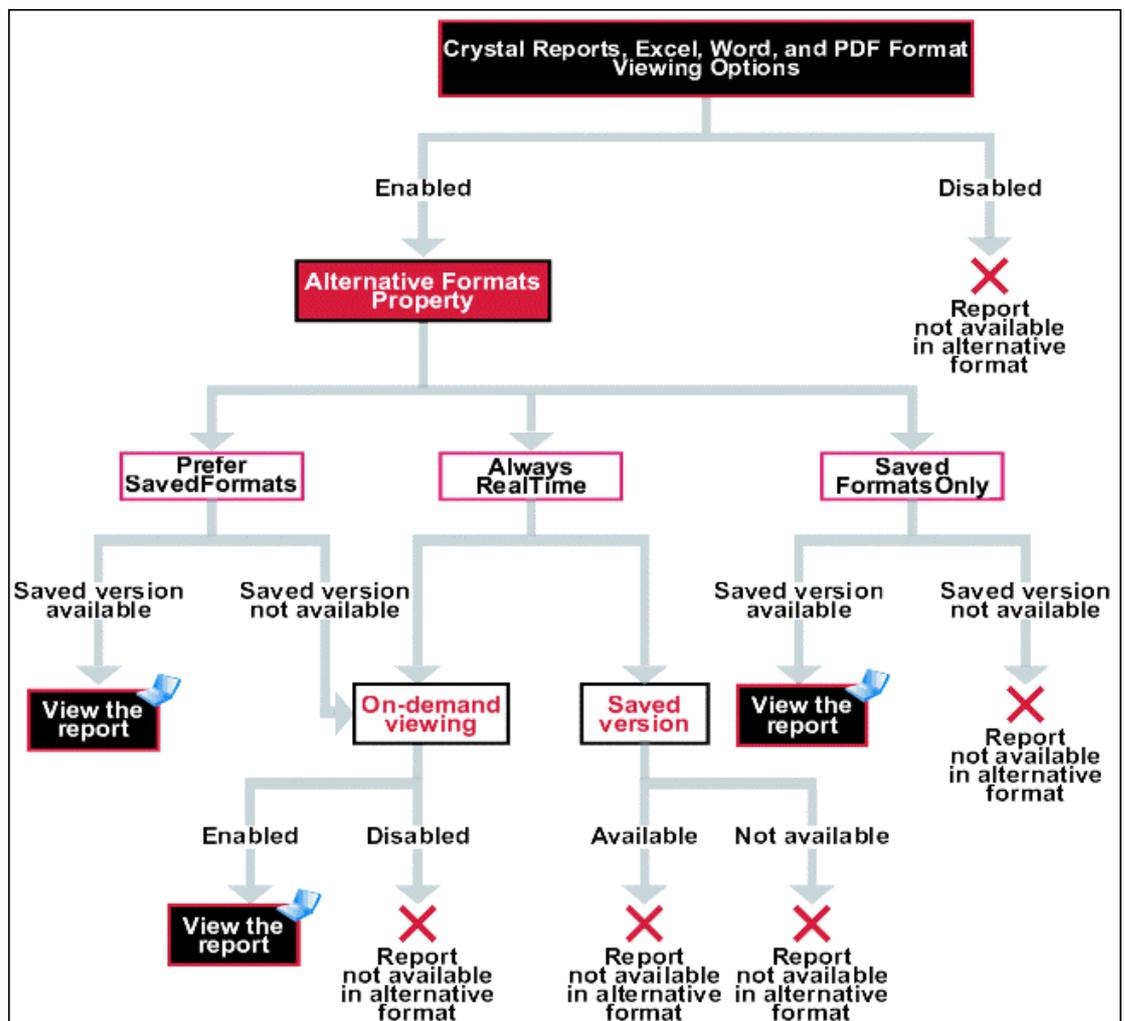
Note: For this option, previously saved versions of the reports must be available in Crystal Enterprise. However, the Crystal Enterprise administrator must also grant export rights and on-demand viewing rights to the Information Consumers in case previously saved versions of the reports are/become unavailable.

5. Click **OK**.

After specifying the Alternative Formats property, you can decide which alternative formats will be available for the Information Consumer to use. For instructions on how to enable the different alternative format viewing buttons on the Report for You web part toolbar, see the *Crystal Enterprise 10 SharePoint Portal Integration Kit User's Guide*.

Verifying the Setup

As a best practice for Web Site Creators, you should always check to see whether or not the settings that you specified in the Report for You web part correspond to the settings that are specified in Crystal Enterprise. Otherwise, regardless of how you configure the web part, the Information Consumers may not be able to view their reports in alternative formats.



For example, suppose that you specify AlwaysRealTime as the value for the Alternative Formats property, but the Crystal Enterprise administrator does not grant export rights and on-demand viewing rights to the Information Consumers. The Information Consumers will not be able to view their reports in alternative formats.

Similarly, if you specify SavedFormatsOnly for the Alternative Formats property, but the Crystal Enterprise administrator does not configure Crystal Enterprise to generate and save versions of the reports, then the Information Consumers will not be able to use the alternative format viewing functions on the Report for You web part toolbar.

For more information, contact your Web Site Creator and/or your Crystal Enterprise administrator, or refer to the *Crystal Enterprise 10 SharePoint Portal Integration Kit User's Guide*.

¹ The availability of the Crystal Reports, Excel, Word, and PDF viewing buttons depends on the configuration that is set by your Web Site Creator and your Crystal Enterprise administrator. Depending on your deployment, you may find some, all, or even none of the buttons available for you to use. For information about the availability of these buttons, contact your Web Site Creator and/or your Crystal Enterprise administrator.

Americas

Business Objects Americas Inc
Tel : +1 408 953 6000
+1 800 527 0580

Australia

Business Objects Australia Pty Ltd
Tel : +612 9922 3049

Belgium

Business Objects BeLux SA/NV
Tel : +32 2 713 0777

Canada

Business Objects Canada Inc
Tel : +1 416 203 6055

France

Business Objects SA
Tel : +33 1 41 25 21 21

Germany

Business Objects Deutschland GmbH
Tel : +49 2203 91 52 0

Italy

Business Objects Italia SpA
Tel : +39 06 518 691

Japan

Business Objects Nihon BV
Tel : +81 3 5720 3570

Netherlands

Business Objects Nederland BV
Tel : +31 30 225 9000

Singapore

Business Objects Asia Pacific Pte Ltd
Tel : +65 6887 4228

Spain

Business Objects Ibérica SL
Tel : +34 91 766 87 43

Sweden

Business Objects Nordic AB
Tel : +46 8 508 962 00

Switzerland

Business Objects Switzerland SA
Tel : +41 56 483 40 50

United Kingdom

Business Objects (UK) Ltd
Tel : +44 1628 764 600

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