Personalizing SAP BusinessObjects Explorer Information Spaces

Applies to:
SAP BusinessObjects Explorer and personalizing the display of data using Universes and Excel data sources.

Summary
This document covers the creation of SAP BusinessObjects Explorer information spaces.

Author: David Gabel
Company: SAP
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Author Bio
David Gabel, Senior Engineer, is an engineer in Business User Support since January 2007, supporting SAP BusinessObjects Web Intelligence, SAP BusinessObjects Explorer, and the Business Objects Explorer for the iPad application.

He also mentors and supports a team of engineers.
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Personalization concepts and Row-level security

Personalization is used to filter a SAP BusinessObjects Explorer information space to display data specifically intended for an individual or group of consumers. Using universe row-level security is an ineffective way to personalize data that is used by Explorer. The data for exploration in Explorer is retrieved when the information space is indexed. If the information space is indexed and the universe is employing row-level security, then data retrieved from the database will be the data available to the user who indexed the information space.

Example

Using Efashion Universe as an example, user Steve has access to data for the State of California; Leonard has access to data for the State of Texas.

When row-level restrictions are placed on the universe, and Steve refreshes the index on the information space, the data retrieved will be rows that qualify for Steve. When Leonard logs on to Explorer and attempts to view the information space, he will see data for Texas since there is no connection to the database when the information space is explored.

Using a Reference Information Space for Personalization

To implement personalization of data in SAP BusinessObjects Explorer you need to create two information spaces:

- A reference information space that contains all of the data that will be explored by all users
- A personalized information space where the data is specific to the user exploring the information space.

Creating the Reference information space with a Universe

The reference information space index will be used by the personalized information space to gather the data to present a personalized view of the data intended for each user.

Using Efashion as the universe for this example, you would need to create the Enterprise users that will be consuming the information space. To prepare the environment, in the Central Management Console (CMC)

1. Create a user account for each store manager in the Efashion universe: Barrett, Quinn, Michelle, Steve, Larry, Leonard, Anderson, Bennett, Queen, Richards, Tuttle, Steve, and Mark

2. Create two folders “Reference Spaces” and “Personalized Spaces”.

3. Create a reference information space:

   a. Launch SAP BusinessObjects Explorer and log on as an Administrator user or a user that has access to all of the data in Efashion database.

   b. Click Manage Spaces.

   c. Click Efashion universe.

   d. Click the New button to create a new information space.

   e. On the Properties tab, name the information space “Efashion Reference”, provide a description, and choose the folder Reference Spaces for the Folder option.

   f. On the Objects tab, add the facets Year, Quarter, Month, Week, State, City, Store name, Name of Manager, Lines, Category, SKU Number, Colour, Unit Price, Extended Price, Sold at, Sales Revenue, and Quantity Sold.

   g. Validate the query by clicking the Validate button, and if the query validates click OK to save the information space.
4. **Index the information space by clicking the **Index Now** button:**

Once the index creation has completed you have an information space that can be used as a reference space for personalization.

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**Creating the Personalized Information Space with a Universe**

After you have created the reference information space you can create the personalized information space:

1. Launch SAP BusinessObjects Explorer and log on as an Administrator user or a user that has access to all of the data in Efashion database.
2. Click **Manage Spaces**.
3. Select the **Efashion** universe.
4. Click the **New** button to create a new information space.
5. On the **Properties** tab name the information space “Efashion Personalized”, provide a description, and choose the folder **Personalized Spaces** for the **Folder** option.
6. On the **Objects** tab, add the facets Year, Quarter, Month, Week, State, City, Store name, Name of Manager, Lines, Category, SKU Number, Colour, Unit Price, Extended Price, Sold at, Sales Revenue, and Quantity Sold.
7. On the **Personalization** tab enable the option **Personalize information space Exploration**.
8. Select the **Efashion Reference** information space created earlier for the **Select an information space** drop-down option.
9. Map **User name** from the **To filter:** column to the **Name of Manager** in the **Filtered** by column. Optionally you can map the other fields.
10. Index the information space by clicking the **Index Now** button:

Once the index creation has completed you have an information space that can be used for personalized exploration.

**Exploring the Personalized information space with a Universe**

To demonstrate the difference between the personalized information space and the reference information space, log on to SAP BusinessObjects Explorer as Administrator and click the **Efashion Reference** information space.

You will notice that Administrator has access to all of the data for all of the store managers. If you log on as any user and view the reference information space, you will also have access to all of the data.

1. Use the scroll bar to scroll to the facet **Name of Manager**. Notice that you see all managers listed and the revenue for each.
2. Log out of Explorer and log on as one of the store manager accounts that you created earlier.

3. Select the E-fashioned Reference information as you did when logged in as administrator. You will notice there is no difference in the data that you see.

4. Close the Reference information space and select the E-fashioned Personalized information space. Once the information space opens you will immediately see that there is much less data displayed. You will notice that you are only seeing data for the Name of Manager that you logged on with. In the screenshot below the user logged is Steve:

   ![Screenshot of E-fashioned Personalized information space]
   
   Use the scroll bar to scroll over to make the Name of Manager visible.
Creating the Reference Information Space with Universe and Excel Spreadsheet

The reference information space index will be used by the personalized information space to gather the data to present a personalized view of the data intended for each user. Using Island Resorts Marketing as the universe for this example, you would need to create the Enterprise users that will be consuming the information space. You can use the User ID’s created earlier; Steve, Mark, Leonard, Anderson and Quinn. In this example we will be personalizing the UserID on Country of Origin.

To create a reference information space:

1. Launch Microsoft Excel.
2. Add columns for UserID and CountryOO.
3. In the UserID column add Steve, Mark, Leonard, Anderson and Quinn.
5. Save the Excel file to your Desktop (or other location).
6. Log on to the Central Management Console as an administrative user.
7. Click Folders and navigate to the Reference Spaces folder.
8. Go to Manage > Add > Local Document.
9. In the Filename box click Browse and navigate to the local Excel file you saved in Step 5.
10. Select the Excel Spread sheet and click Open.
11. In the File Type box choose Microsoft Excel:

12. Log on to SAP BusinessObjects Explorer as an administrative user.
13. Click Manage Spaces.
14. Expand **Excel spreadsheets** to the **Reference Spaces** folder, select the Excel file saved in Step 5, and click the **New** button.

15. Name the information space, provide a description, select the folder **Personalized Spaces** to store the information space in, and then click **OK**.

16. Index the information space by clicking the **Index Now** button.

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**Creating the Personalized information space with Universe and Excel spreadsheet**

You may wish to personalize an information space based on a universe where the underlying data source does not contain the user information. You can personalize the information space by mapping the personalized data for the user in an Excel sheet. The only drawback to this would be that there would need to be maintenance on the Excel sheet and the information spaces when the personalization changes. For the example below we will personalize the Country of Origin with the user id.

1. Launch SAP BusinessObjects Explorer and log on as an administrative user or a user that has access to all of the data in Efashion database.

2. Click **Manage Spaces**.

3. Select the **Island Resorts Marketing** universe.

4. Click the **New** button to create a new information space.

5. On the **Properties** tab name the information space “Island Resorts Personalized”, provide a description and choose the folder **Reference Spaces** for the Folder option.

6. On the **Objects** tab, add Country, Resort, Country of origin, Region and City as Facets, add Future guests and Number of guests as measure.

7. Validate the query by clicking the **Validate** button, and if the query validates click the **OK** button to save the information space.

8. Click the **Personalization** tab and then click the **Personalize information space exploration** option to enable it.

9. Click the **Island Resorts Reference** information space from the **Select an information space** option.
10. Map the **User name** with the **UserId** facet from the **Island Resorts Reference** information space.

11. Map the **Country of origin** facet with the **CountryOO** facet from the **Island Resorts Reference** information space, and then click **OK**.

12. Index the information space by clicking the **Index Now** button.
Once the index creation has completed you will have an information space that can be used as a reference space for personalization.

Exploring the Personalized Information Space with Universe and Excel spreadsheet

To demonstrate the personalization, log on to SAP BusinessObjects Explorer as user Mark.

You will notice that Mark only has access to data for Country of origin equal to France. If you log on as any user and view the reference information space, you will see the data intended for them that you have mapped in the Excel spreadsheet.

Restricting the Information Spaces

Now that you have created the reference information space, you may wish to prevent the users from exploring this information space and only view the personalized space. To do so, prevent the reference space from being viewed by disabling the option “Show in home page”:
1. Log on to SAP BusinessObjects Explorer as an administrative user.
2. Click Manage Spaces and navigate to and select the Efashion universe used to create the reference and personalized spaces.
3. Select the Efashion Reference information space.
4. Clear the “Availability – Show on Home page” option. The Efashion Reference information space is no longer be visible on the home page for exploration.

To restrict users from modifying the information spaces and gaining access to the Reference Space, use enterprise security on the Reference Spaces folder and deny the right for users to edit objects in the folder.
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