

# Crystal Xcelsius

## Leveraging Crystal Reports Publisher-based Instances for Personalization of Crystal Xcelsius content using Live Office

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### Overview

This document provides a step-by-step guide on how to build personalized Xcelsius content leveraging Published (Bursted) Crystal Reports. This example is based on the Extreme sample database.

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## Introduction

The different sections of this document will explain how to define profiles, create a publication, configure Live Office, and configure Crystal Xcelsius with some personalization examples.

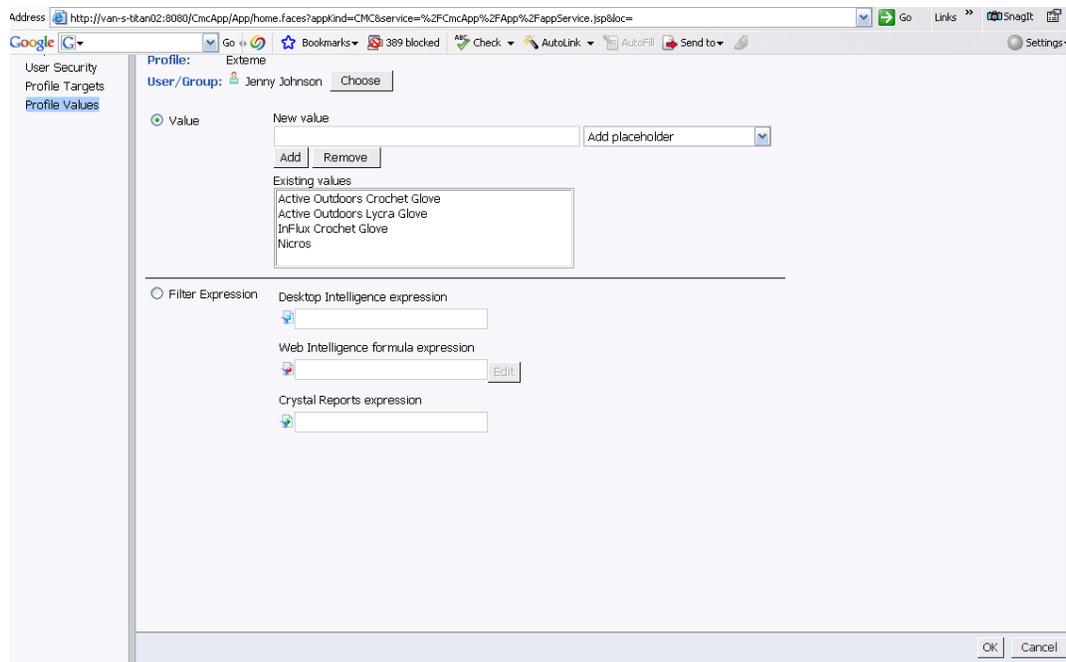
## Defining Profiles

You define Profiles in order to create row level restrictions for Enterprise users. Although row level restrictions can also be defined in Universes, Profiles enable non-Universe-based reports to honor row-level restrictions as well. These definitions are defined so that personalized distribution of reports can be achieved.

To create a new Profile do the following:

1. Log in to the Central Management Console (CMC) and click **Create New Profile** under the **Profile** section.
2. Click **Profile Values** link > **Add** button to define Profile Values (this allows you to bind Enterprise users to specific Filtered Data).
3. Click **Choose** and select Enterprise users or groups (that you want to have the same filter restrictions).

Figure 1



4. In the **Value** section, enter a text in the **New Value** text box and click the **Add** button. These are the dimension values that you want to allow the selected users to have access. In this case, the **Product Name** dimensions with four different product names were added.

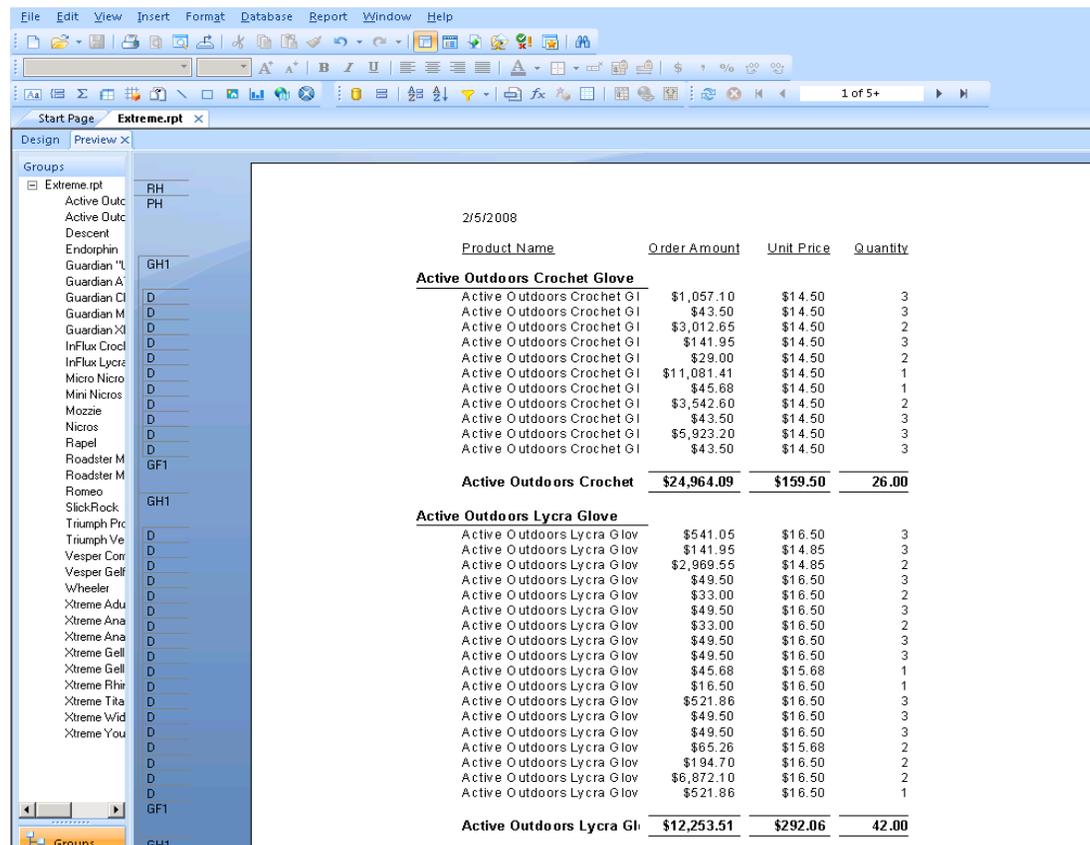
5. When you want to have another User or Group defined, with a different data access criteria, then click the **Choose** button again and add the desired users/groups.
6. Add the specific Dimension Values to restrict access for those users/groups.
7. Repeat Steps 3 and 4 for any User or Group that has a unique data access restriction.
8. After clicking the **OK** button each User/Group will be displayed with the restriction values listed.

Figure 2



9. Create and save to the Central Management Server (CMS) a Crystal Report that includes the dimension values defined in the Profile restrictions. In the example below Product Name is included on the report.

Figure 3



## Creating a Publication

Create a Publication that will distribute the report that was created in the previous section. As a best practice, it is recommended that you log into InfoView as a user specifically defined for creating Publications. This is particularly important if you wish to be a recipient of the distribution yourself. For example, if your username is “John Smith” you may want to have a user defined as “John Smith\_Publisher” for the purpose of creating and scheduling Publications. Using this approach you can have “John Smith” as a recipient and be assured of accurate distribution of content.

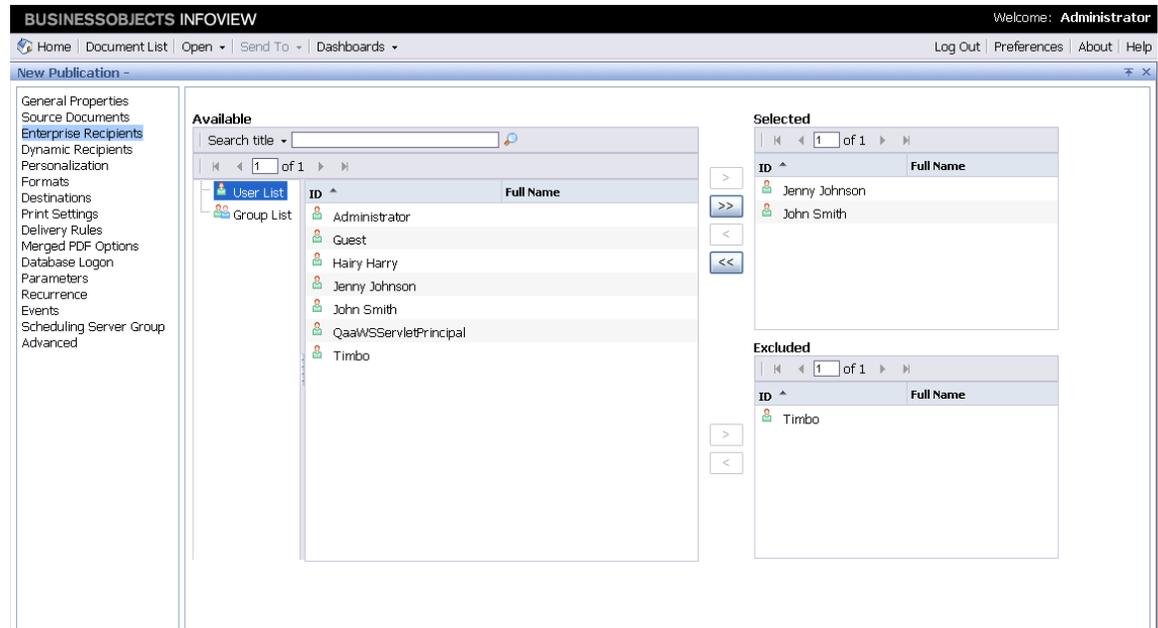
To create a Publication do the following:

1. Within InfoView click **New Publication** and enter a name for the Publication.
2. Select the **Source Document** to be Published and click the **OK** button. This would be the Crystal Report document that was saved to the CMS in the previous section.
3. Set the **Enterprise Recipients** that are to receive the Publication.

### NOTE

Any user in the **Selected** section that has a defined Profile in the CMC will receive data restricted as per the Profile definition. If the **Selected** user does not have a Profile restriction all data will be returned based on the Source Document's complete result set.

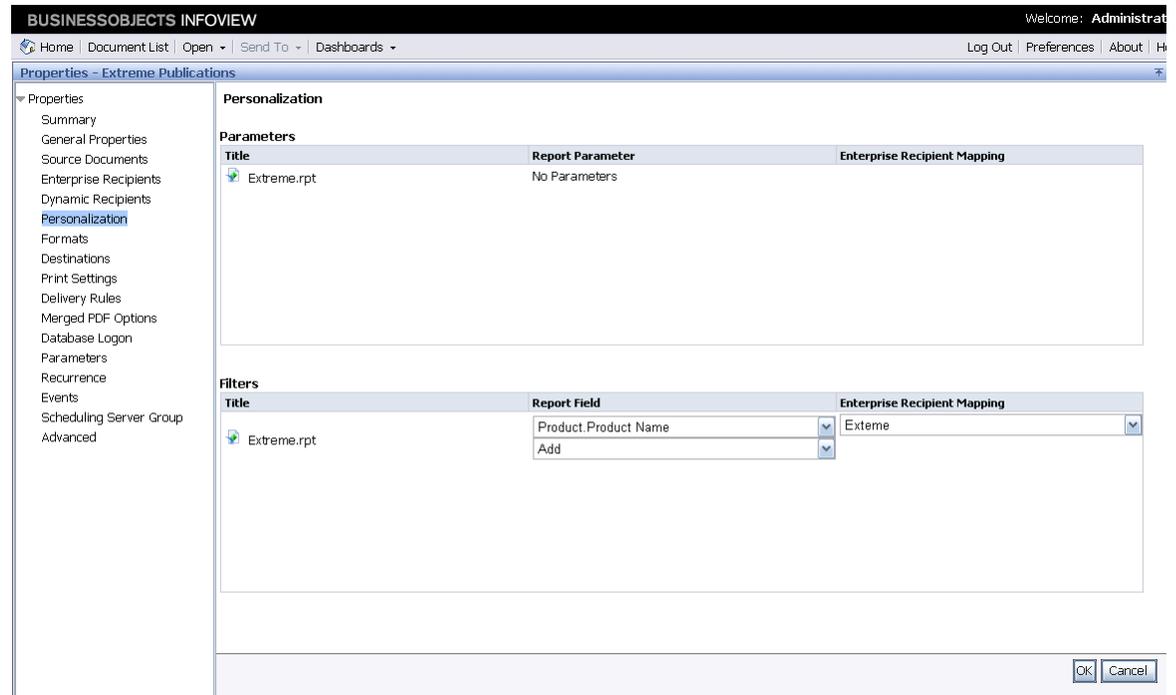
Figure 4



4. Click the **Personalization** link in order to configure how the Distribution will be personalized for each recipient. This setting binds the selected *Source Document* to the *Profile* as defined in the CMC from steps 1-7 in the previous section. In this example, the **Extreme.rpt** source document is bound to the **Extreme** Profile using

the **Product.Product\_Name** report field. This is defined in the **Filter** section. The values returned, in the selected report field, are compared to the values defined in the selected Profile to determine and filter the content for the target recipients.

Figure 5

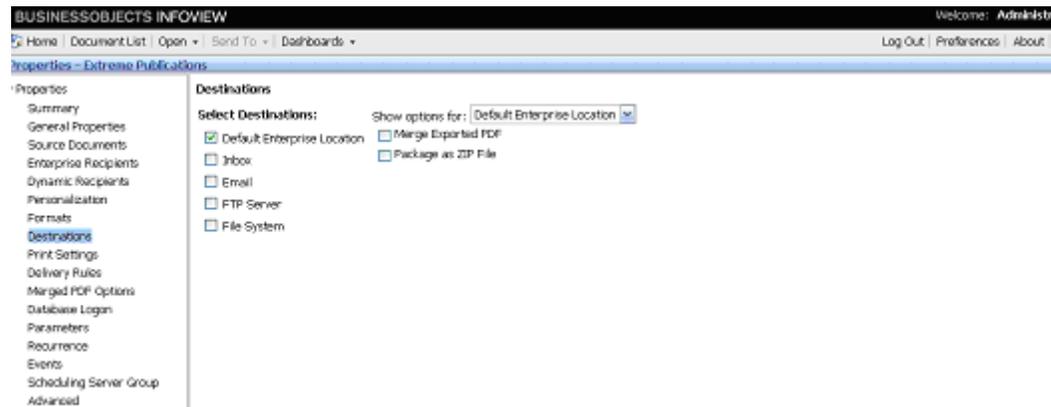


5. Set the Distribution locations. More than one distribution type may be set, but for Live Office consumption, **Default Enterprise Location** must be set as one of the distributions.

**NOTE**

If you also want to send to email, email options are not saved in the **Destinations** panel unless the **Email** check box is selected.

Figure 6



6. Click **OK** to save the Publication definition.
7. **Right Click** on the Publication and select **Schedule** in order to run the Publication job at least once.

<b>NOTE</b>	In order for Live Office to leverage published documents, at least one historic instance must be rendered.
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8. Under **Recurrence** leave it with the default setting for the **Run Object** drop-down list of **Now**.
9. Check the **History** and verify that the Publication job executed successfully.

## Configuring Live Office

The following steps describe how Live Office will leverage the previous defined Publication. You need at least one historic instance of the published documents.

<b>NOTE</b>	The screen capture examples are based on Microsoft Office 2007. The general workflow is very similar to Office 2003 or XP but menu and icon selections may appear different.
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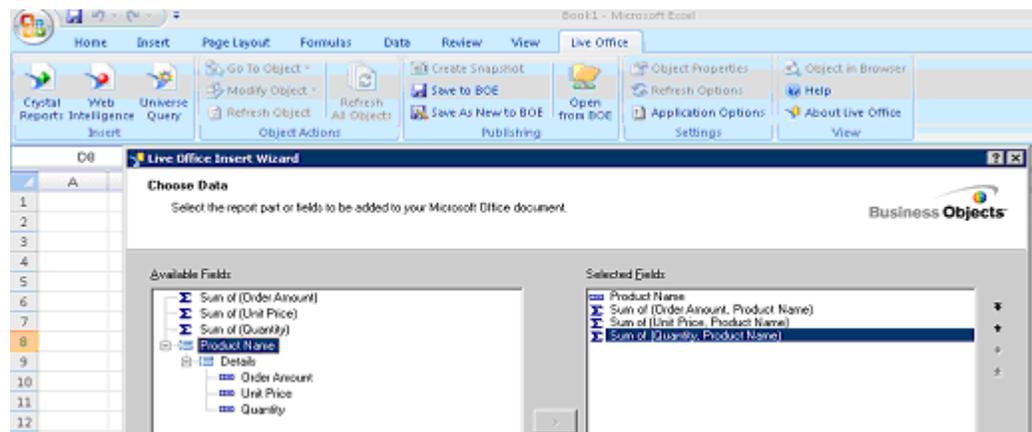
1. From a Live Office enabled Client system, open Excel and click on the Crystal Reports Icon or menu option within the Live Office menu.
2. Log in to the CMS and navigate to the folder containing the Publication job defined earlier.

<b>NOTE</b>	The Crystal Report Source Document contained within the defined Publication <b>MUST</b> be selected in order for Live Office to leverage Published and Personalized document instances.
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3. Select the desired report fields using the **Live Office Insert Wizard** that displays once you select the document and click the **OK** button.

<b>NOTE</b>	Since the final consumption of this Live Office document will be from Crystal Xcelsius, it is recommended that you limit the size of the results and leverage aggregates when possible.
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Figure 7



4. The results from the published document will be returned into the Excel spreadsheet. The Live Office document can now be saved locally or to the CMS. Click the **Saved as New to BOE** button.

Figure 8



The screenshot shows the Microsoft Excel interface with the 'Live Office' ribbon selected. The ribbon includes options like 'Go To Object', 'Modify Object', 'Refresh Object', 'Refresh All Objects', 'Create Snapshot', 'Save to BOE', 'Save As New to BOE', 'Open from BOE', 'Object Properties', 'Refresh Options', 'Application Options', 'Object in Browser', 'Help', and 'About Live Office'. Below the ribbon, a table is displayed with the following data:

	A	B	C	D
1	<b>Product Name</b>	<b>Sum of (Order Amount, Product Name)</b>	<b>Sum of (Unit Price, Product Name)</b>	<b>Sum of (Quantity, Product Name)</b>
2	Active Outdoors Crochet Glove	\$24,964.09	\$159.50	26
3	Active Outdoors Lycra Glove	\$12,253.51	\$292.06	42
4	InFlux Crochet Glove	\$8,196.14	\$147.15	26
5	Nicros	\$35,140.24	\$5,244.62	24
6				

## Configuring Crystal Xcelsius

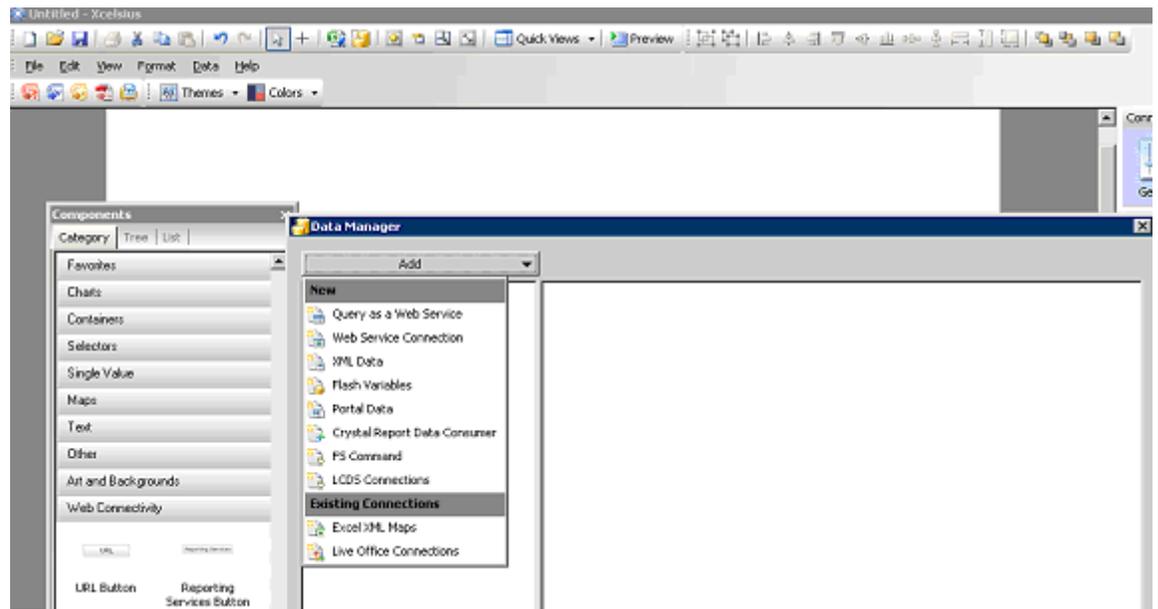
The following steps describe how to leverage the defined Live Office Document within Crystal Xcelsius.

### NOTE

The screen captures for this example are using Xcelsius 2008. Therefore, the workflow is slightly different from the 4.5 release. Xcelsius 2008 leverages a new Data Manager that centralizes the various data connectors within a model.

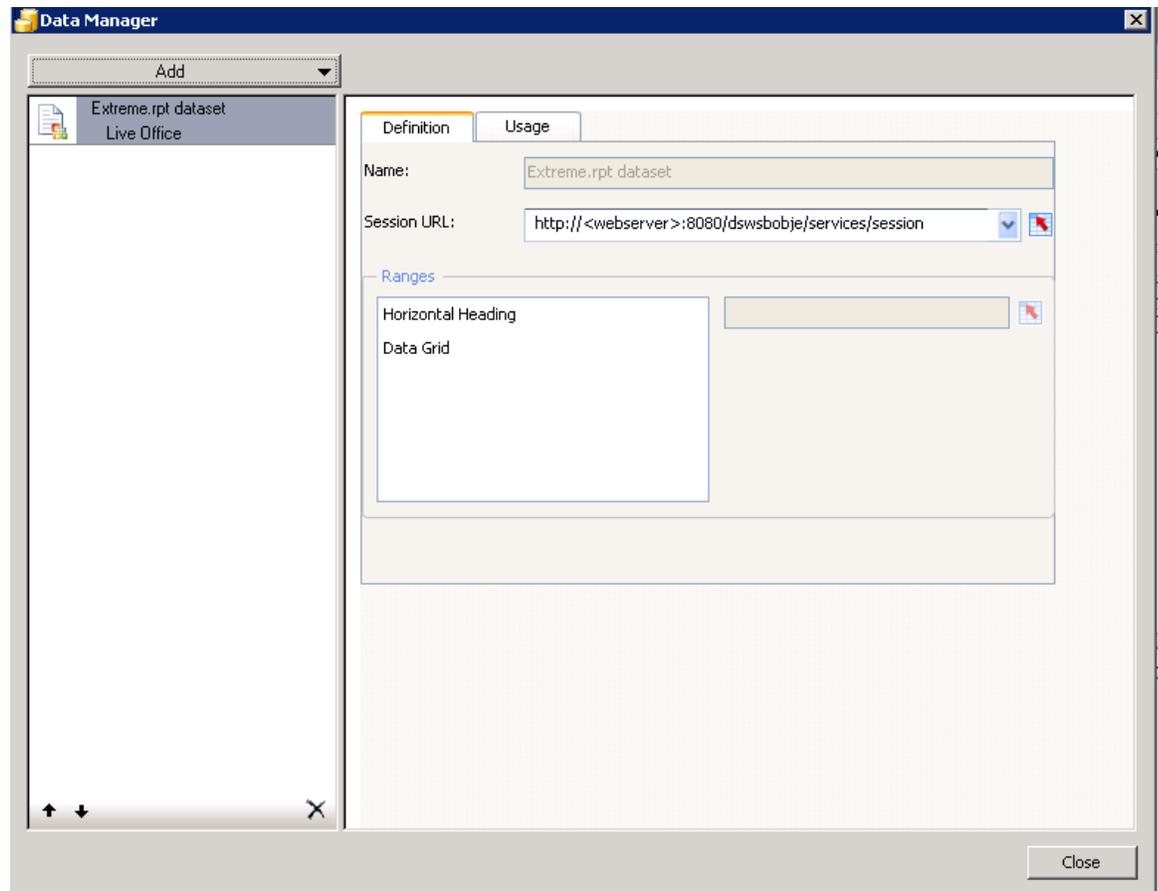
1. Open Crystal Xcelsius Designer, click **Data**, click **Import from Enterprise** since the Live Office Excel document was saved to the CMS, and select the document from the appropriate folder.
2. Create a **Live Office Connector**, which must be added to the model.

Figure 9



3. In the **Definition** tab on the right panel, replace the **<webserver>** value in the **Session URL** text box with the actual server name of the appropriate BusinessObjects Enterprise server.

Figure 10



4. Set the **Horizontal Heading** and **Data Grid** settings under **Ranges** to the Cell Range locations in alignment with the locations in the Spreadsheet as defined in the Live Office document.
5. Add any Xcelsius Visualization controls as desired and map the Display or Source cell ranges as appropriate.

## Personalization examples in Xcelsius

Figure 11 is an example as a result of user John Smith logging in and opening the Xcelsius model.

Figure 11

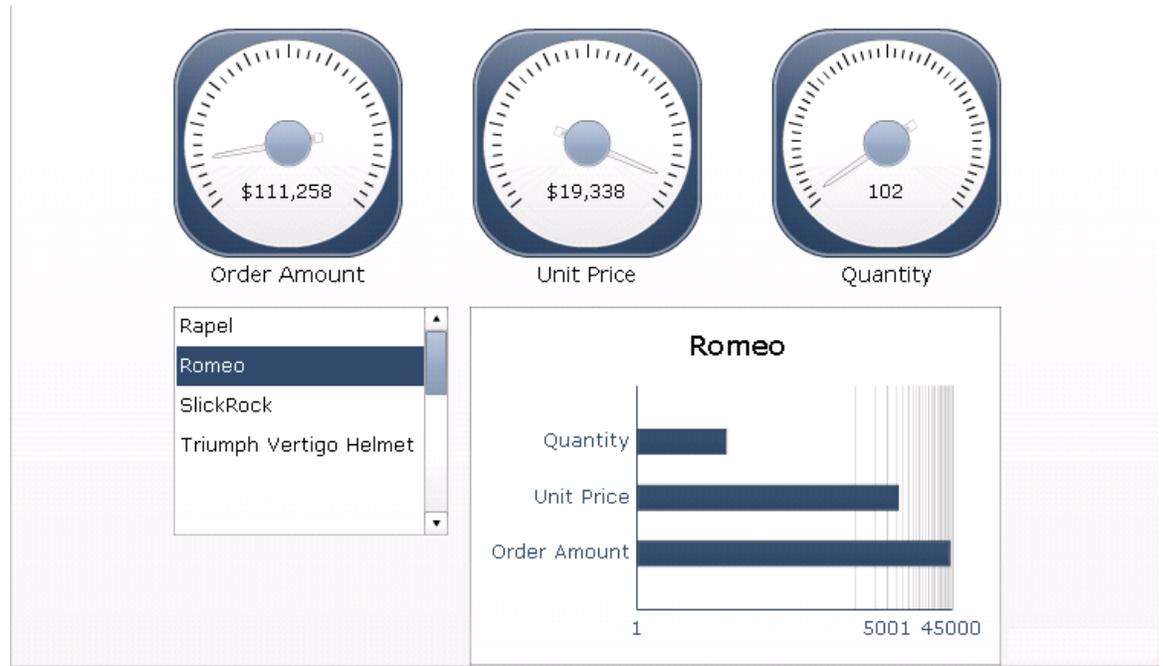
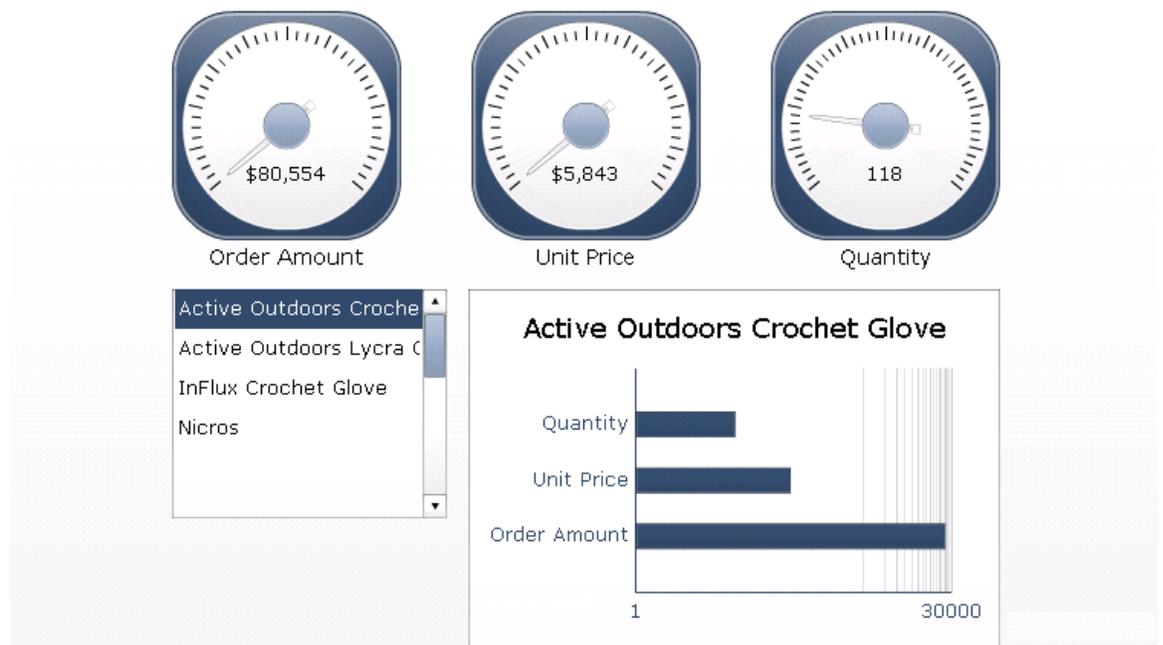


Figure 12 is an example as a result of user Jenny Johnson logging in and opening the Xcelsius model.

Figure 12



## Finding more information

For more information and resources, refer to the product documentation and visit the support area of the web site at

<http://www.businessobjects.com/>

► [www.businessobjects.com](http://www.businessobjects.com)

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