Creating and Scheduling Publications for Dynamic Recipients on SAP Business Objects Enterprise

Applies to:
SAP BusinessObjects Enterprise. For more information, visit the Business Objects homepage.

Summary
This white paper describes how to create a publication using Crystal Reports to enable report bursting and scheduling.

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Introduction

This document explains the steps necessary to create and schedule a publication for dynamic recipients on SAP BusinessObjects Enterprise for a Crystal Report.

This document is based on SAP BI 7.0 and SAP BO XI 3.1 SP3.

Publication

Publication is an automated process of mass distribution of reports by tailoring them to individual or group of recipients’ requirements.

Publications can help you to:

- Send personalized information in the required format to the intended recipients at specific intervals of time.
- Minimize database access.
- Deliver targeted business information to groups or individuals through a portal.

Creating a Publication

1. Log on to the Central Management Console (CMC).
2. Go to the Folders area of the CMC.
3. Browse for the folder in which to create the publication.

4. Click Manage > New > Publication.

5. Enter a title for the publication in the Title field.
6. Click Source Documents > Add.

7. Browse for the source documents to include and select it. Click OK.
Publication Options

Dynamic Recipients

Dynamic recipients are publication recipients who exist outside of the BusinessObjects Enterprise system. Create a Web Intelligence report, purge the data, and save report with refresh on open option. (Crystal Report would not be able to fetch latest data and hence could not be used as a dynamic recipient source.)

1. Click Dynamic Recipients to specify dynamic recipients.

2. Choose the format of the dynamic recipient source in the right-hand pane.
3. Browse for the object to use as a dynamic recipient source in the right-hand pane. Select it. Click OK.

4. Click the drop-down and select the query.

5. For Recipient Identifier, select a field that contains the recipient identity values.

6. Full Name is optional. Select a field that contains the full names of recipients.

7. To deliver the publication to email addresses, select a field that contains the recipient email addresses on the email list.

To distribute the publication to all dynamic recipients, ensure **Use entire list** is selected or else clear **Use entire list**.
Personalization

Personalization is the process of filtering data in source documents so that only relevant data is displayed for publication recipients.

1. Click Personalization.
2. Click the Edit button that is next to the parameter value to change a default value. Select or enter the parameter value. Click OK.
3. Choose a dynamic recipient source column from Dynamic Recipient Mapping column to override the default parameter value.

Formats

A single document can be published in multiple formats, and these instances can be delivered to multiple destinations.

1. Click Formats.
2. Select the available Crystal report title.
3. Select required format from the Format Options. Click Add.

Destinations

Destinations are locations that you deliver publications to. A destination can be the BusinessObjects Enterprise location in which a publication is stored, a Business Objects inbox, an E-mail address, an FTP server, or a directory on the file system.

Email

1. Click Destinations.

2. Select the check box next to email option on the right-hand pane. Ensure SMTP is configured on BO Server.

3. Complete the To field or enter a placeholder for the email address (%SI_E-MAIL_ADDRESS%).

4. Enter the subject or select a placeholder to use for this field (optional).

5. Select check box next to Deliver Document(s) as Attachment.

6. Select check box next to Use Automatically Generated Name. Enter a specific name for it, or choose from a list of placeholders.
File system (local disk)

1. Select the check box next to File System option in the Select Destinations area.
2. Enter the directory for Publication. Ensure the directory is available on the BO Server and user privileges are set to access the directory.
3. Have the file name automatically generated, enter a specific name for it, or choose from a list of placeholders.
4. Enter a user name and password to access the file location.

Note: Ensure that filename does not include “/” else while copying file to the directory location, file structure would be created.

For example, if Sales_10/10/2010_1014 is the desired file name. While copying the file to the directory location, it would create Sales_10>10>2010 file structure and would place 1014 file in that directory.
Database logon

1. Expand Additional Options. Click Database Logon to configure database logon information.
2. Select the Crystal report.
3. Validate the information that appears in the Database Server and Database fields is correct.

4. Enter username and password.

Scheduling

1. Expand Additional Options. Click Recurrence to specify scheduling information.
2. Select a recurrence pattern on the Run object list.
Events

1. Create file/schedule based events in Events area of CMC to schedule publications using events.
2. Expand Additional Options and click events to specify events information.
3. Select respective “Wait for” and “Trigger on completion” events.

![CMC Events Scheduling Screenshot]

Notification

1. Expand Additional Options and click Notification to configure email notification for successful or failed publication jobs.
2. Expand E-mail Notification: Not in use.
3. Select the checkbox next to “A job has been run successfully”. Configure the options below to receive email notification for successful publication jobs.
4. Select the checkbox next to “A job has failed to run”. Configure the options below to receive email notification for successful publication jobs.

![CMC Notification Scheduling Screenshot]
Report Bursting Methods

1. Expand Additional Options to specify a report bursting method. Click Advanced.
2. Select one of the options under Report Bursting Method.

Tips and Tricks

- Objective: To add parameter value dynamically to the subject of E-mail and filename of E-mail attachment.

Note: This would work only when dynamic recipient files are crystal reports. If dynamic recipient file is a webi report, this should be handled at back end.

- Ex: "eFashion – Qty Sold_California_2001"
- Source Report: Has fields Year, State, SKU Desc, and Qty Sold

- Dynamic Recipient list Report: Has fields Year, State (Recipient ID), Fullname_Concat (Fullname), E-mail
After selecting Dynamic Recipient source

1. On the Recipient Identifier list, select efashion_query.State.
2. On the Full Name list, select @Fullname_Concat.
3. On the E-mail list, select @E-mail.
Setting Destinations Options

1. Select the check box next to E-mail option in the “Select Destinations” area.
2. Complete the To field or enter a placeholder for the E-mail address (%SI_E-MAIL_ADDRESS%)
3. Select “Title”, type “_” and select “User Full Name” from placeholder to use for this field to add parameter value to subject.
   “Title” would result in “eFashion – Qty Sold”
   “_” would result in “_”
   “User Full Name” would result in something like “California_2001”
   Thereby Subject would be something like “eFashion – Qty Sold_California_2001”

4. To add parameter value to filename, have the attachment name automatically generated, select “Title”, type “_” and then select “User Full Name”, then type “.” and select “Extension” from placeholder to use for this field.
   “Title” would result in “eFashion – Qty Sold”
   “_” would result in “_”
   “User Full Name” would result in something like “California_2001”
   “.” Would result in “.”
   “Extension would result in selected file format “pdf”
   Thereby attachment would be something like “eFashion – Qty Sold_California_2001.pdf”
Observations

- Publication is stored as metadata on BOE. Any changes to source file would not be reflected in publication.
- In case of any changes to the source file, a new publication has to be created.
- Web Intelligence is not capable of using Customer Exit variables restrictions in BEx.
- Crystal Reports is capable of using Customer Exit variable but is incapable if returning values from BEx.
- If Dynamic Recipient file is a Crystal Report and source is RDBMS, to get data dynamically to Dynamic recipient file, save Crystal Report without “Save Data with Report” option. This approach would not work when source is SAP BI.
- If source system is SAP BI, to dynamically update dynamic recipient file in publication, create a Web Intelligence report, purge the data, and save the report. Ensure that there are no customer exit variable restrictions used in BEx.
- If source system is SAP BI, Dynamic Recipient list report has to be published using BOE publisher. If published using BW publisher, the publication would generate an error.
Related Content

BusinessObjects Enterprise XI 3.1 Publisher's Guide

Forum thread: Dynamic Parameter Values

For more information, visit the Business Objects homepage
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