



# BusinessObjects XI Release 2 InfoView for SAP User's Guide

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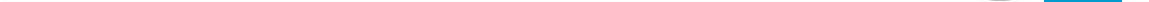


Welcome to  
BusinessObjects XI Release  
2 Integration Kit for SAP



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chapter



## What are BusinessObjects Enterprise and BusinessObjects InfoView for SAP?

BusinessObjects InfoView for SAP runs within your web browser and gives you the ability to view, export, and print reports, without the need of installing Crystal Reports on your local machine. Report viewing is supported through different viewers, which are compatible with the features of ActiveX, Java, and DHTML. You can also schedule reports if you have the necessary rights.

BusinessObjects InfoView for SAP is a customized version of the standard InfoView. It is specifically designed to work with the BusinessObjects XI Release 2 Integration Kit for SAP. BusinessObjects InfoView for SAP does not replace the standard InfoView that is installed on your web server; rather, it is installed alongside the standard BusinessObjects Enterprise web applications.

BusinessObjects InfoView for SAP provides a number of features that are specific to SAP reporting environments. These features include the ability to log on with your usual SAP user name and password, a My Groups folder that provides quick access to all of the objects that have been saved in your various SAP roles, and the ability to view and schedule objects in multiple languages. For more information about the features which are specific to BusinessObjects InfoView for SAP, see [Chapter 4: Special Features in BusinessObjects InfoView for SAP](#).

## What is BusinessObjects XI Release 2 Integration Kit for SAP?

BusinessObjects XI Release 2 Integration Kit for SAP provides you, the SAP user, with the ability to extract the business intelligence contained within your SAP systems. By generating reports from SAP BW queries, ABAP queries, and InfoSets, you can organize, format, and share your SAP data.

BusinessObjects XI Release 2 Integration Kit for SAP allow provides you with the ability to report off Open SQL queries and BW OLAP data sources from within Crystal Reports, BusinessObjects Enterprise, and OLAP Intelligence.

BusinessObjects InfoView for SAP allows you to share your reports over the Web, and SAP Authentication enables Single Sign On between your SAP system and BusinessObjects Enterprise.

## Who should use this guide?

This guide is intended for users who use BusinessObjects Enterprise to work with reports over the Web. The interface in BusinessObjects Enterprise is designed to facilitate intuitive navigation—you can easily schedule and view reports. Your BusinessObjects Enterprise administrator is generally responsible for configuring, managing, and maintaining a BusinessObjects Enterprise installation.

For more information about BusinessObjects Enterprise, consult the *BusinessObjects Enterprise Administrator's Guide*, the *BusinessObjects Enterprise Getting Started Guide*, and the *BusinessObjects Enterprise Installation Guide*. Online versions of these guides are included in the docs directory of your BusinessObjects Enterprise product distribution.

For more information about BusinessObjects XI Release 2 Integration Kit for SAP, consult the *BusinessObjects XI Release 2 Integration Kit for SAP User's Guide* and the *BusinessObjects XI Release 2 Integration Kit for SAP Installation Guide*. These guides are included in your BusinessObjects XI Release 2 Integration Kit for SAP product distribution.

## Business Objects information resources

For more information and assistance, see [Appendix 8: Business Objects Information Resources](#). This appendix describes the Business Objects documentation, customer support, training, and consulting services, with links to online resources.

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Special Features in  
BusinessObjects InfoView  
for SAP



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chapter

## BusinessObjects InfoView for SAP overview

BusinessObjects InfoView for SAP is a customized version of the standard InfoView. Through BusinessObjects InfoView for SAP, you can access all of the Crystal reports that have been saved in your SAP BW roles and published to BusinessObjects Enterprise. In addition, you can carry out all of the reporting tasks that are supported by the standard InfoView.

This chapter describes the features which are specific to BusinessObjects InfoView for SAP. For general details on viewing, scheduling, and publishing reports, see the remainder of this guide.

BusinessObjects InfoView for SAP provides a number of features that are specific to SAP reporting environments. These features include the ability to log on with your usual SAP user name and password, a My Groups folder that provides quick access to all of the Crystal reporting content that has been saved in your various SAP BW roles, and the ability to view and schedule reports in multiple languages. Through the use of parameters, the BusinessObjects InfoView for SAP also allows you to work with variables in your BW queries.

## Accessing and logging on to BusinessObjects InfoView for SAP

BusinessObjects InfoView for SAP does not replace the standard InfoView that is installed on your web server; rather, it is installed alongside the standard BusinessObjects Enterprise web applications.

Depending on your web environment, you may be redirected to BusinessObjects BusinessObjects InfoView for SAP and/or logged on to BusinessObjects Enterprise automatically from within your SAP or SAP Portals environment. If you are not logged on automatically with your SAP user name, you must provide your usual SAP credentials before you can access the roles and reports in BusinessObjects InfoView for SAP. This section shows how to log on to BusinessObjects InfoViewfor SAP directly, through its default URL.

**Note:** BusinessObjects InfoView for SAP checks the language settings of your browser before displaying the Log On page and, if possible, presents you with information in that language. If BusinessObjects InfoView for SAP has not been installed in your language, English is used as the default.

► **To directly log on to BusinessObjects InfoView for SAP with SAP credentials**

1. Start your web browser and go to BusinessObjects InfoView for SAP. The default URL is:

- **.NET**

`http://webserver/businessobjects/enterprise115/sap/InfoView/`

- **Java**

`http://webserver:port/businessobjects/enterprise115/sap/desktoplaunch/InfoView`

Replace `webserver` with the name of the web server that is set up for BusinessObjects Enterprise. Replace `webserver:port` with the name of the web server and port number that BusinessObjects Enterprise is communicating with the web application server on. (You may need to check with your administrator for the web server name, port number, or exact URL to enter.)

**Tip:** If you have the BusinessObjects XI Integration Kit for SAP installed, you can also click Start > Programs > BusinessObjects XI > BusinessObjects Integration Kit for SAP > BusinessObjects .NET InfoView (or Java InfoView) for SAP.

The Log On page appears.

2. In the **Authentication** list, ensure that **SAP** is selected.

BUSINESS OBJECT

---

Log On to BusinessObjects Enterprise

---

**Existing User**

---

System:

SAP SystemID:

SAP Client:

Username:

Password:

Authentication:  ▼

Language:

3. In the **SAP SystemID** field, type the three-character System ID (SID) for your SAP system. (Contact your administrator if you are unsure of the appropriate SID.)
4. In the **SAP Client** field, type your usual three-digit SAP client number.

5. In the **User Name** and **Password** fields, type your usual SAP logon credentials.
6. In the **Language** field, type your usual SAP language code.  
If reports are available on your system in multiple languages, their titles and descriptions are displayed in the language that you specify here. In addition, on-demand reports display headings, titles, and other information in that language, provided that the report was designed to accommodate multiple languages.
7. Click **Log On**.

You are now logged on to BusinessObjects InfoView for SAP.

## Working with My Groups

When you log on to BusinessObjects InfoView for SAP with your SAP user credentials, the My Groups folder provides you with quick access to all of the Crystal reporting content that has been saved in your various SAP BW roles. Click the My Groups folder to access this view.

**Note:** The My Groups folder is available only after your administrator has imported one or more of your roles that contain Crystal reports.

Each of your SAP BW roles is represented in BusinessObjects InfoView for SAP as a folder that contains reports and/or additional subfolders. Search through the various folders to locate your reports.

Depending on your rights, you may be able to schedule different reports and/or view their latest instances. In addition, you can copy or move reports to your Favorites view so they are easier to locate the next time you log on. For a general introduction to these BusinessObjects InfoView for SAP features, see [“Using BusinessObjects Enterprise” on page 19](#) and [“Working with objects” on page 40](#).

## Working with translated reports

When you view an object that has been published to BusinessObjects Enterprise in multiple languages, BusinessObjects InfoView for SAP first attempts to display the object in the language that you selected when you logged on. If the object is not available in that language, BusinessObjects InfoView for SAP displays the report in its default language.

When you schedule an object that has been published in multiple languages, you can generate instances of the report in one or more languages.

**Tip:** For more information about designing objects for translation and publishing them to BusinessObjects Enterprise, see the *BusinessObjects InfoView for SAP User's Guide*.

► **To schedule a report in multiple languages**

1. Navigate to the object you want to schedule.
2. Click the **Schedule** link for the object.

The Schedule page appears.



3. Select **Languages** from the list of options.
4. Select the languages for which you want to generate instances.
5. Select and specify other scheduling options you want to use.

**Tip:** For details about the options available to you, see “[Scheduling objects](#)” on page 41.

6. Click **Schedule**.

## Working with Secure Network Communication and Single Sign On

If your administrator has enabled Secure Network Communication (SNC) and Single Sign On, when you schedule an object, you can use SNC for Single Sign On to log on to your database. What this means is that the credentials that you provide to log on to BusinessObjects Enterprise are also used to log on to the specified SAP database.

► **To schedule a report with SNC for Single Sign On**

1. Locate the object for which you want to use SNC for Single Sign On.
2. Click the **Schedule** link for the object.  
The Schedule page appears.

3. Select **Database Logon** from the list of options.

4. Ensure that the “Use SNC for Single Sign On” check box is selected.

**Note:** This check box is initially checked by default if SNC is enabled.

5. Select and specify other scheduling options you want to use.

**Tip:** For details about the options available to you, see “[Scheduling objects](#)” on page 41.

6. Click **Schedule**.

## Working with variables in BW queries

Objects that are based off BW queries potentially make use of variables, which contain the values that BW queries use to limit or specify the data that they return. In the BusinessObjects XI Release 2 Integration Kit for SAP, variables within objects are represented as parameters in BusinessObjects InfoView for SAP. Before users can view or schedule the report, they are prompted to choose a value from a dynamic pick list for each parameter. The values that are in the list are the values that were assigned to the variable in the SAP environment.

## Personalization

Personalization is a feature in SAP that enables you to set your own default value for a variable and save it for future use. As a result, when the report is run, the data that is generated is based on the variable value of your choice. If, in the future, you want to run the same report, your saved personalized value is available for you to use.

BusinessObjects InfoView for SAP supports personalization of the values for your BW query. For more information about how to use BusinessObjects InfoView for SAP for personalization, see “Personalization in BusinessObjects Enterprise” in the *BusinessObjects XI Release 2 Integration Kit for SAP User’s Guide*.





# Using BusinessObjects Enterprise



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chapter

## Overview

BusinessObjects Enterprise comes with InfoView, a web desktop that acts as a window to a broad range of useful business information around your company, including Crystal reports, OLAP Intelligence reports, Web Intelligence documents, spreadsheets, and other documents. With BusinessObjects Enterprise, you can access this information and organize it to suit your preferences.

The features available in BusinessObjects Enterprise vary by content type, but in general, you can view information in your web browser, export it to other business applications (such as Excel), and save information to your local machine.

**Note:** BusinessObjects Enterprise can also provide access to a range of analytic tools to help you explore information in more detail. If you have the necessary security rights, you can use these features to modify reports, examine trends over time or look for specific patterns in your corporate data. Contact your BusinessObjects Enterprise Administrator for more information.

To use BusinessObjects Enterprise, you need to have one of the following web browsers installed on your machine:

- Microsoft Internet Explorer
- FireFox
- Mozilla

To use the advanced analytic features in BusinessObjects Enterprise, we recommend you use Internet Explorer.

The folders and objects you can see in InfoView, the rights you have to schedule, the viewer you see, and so on, are dependent on the account you log on with. You can log on as a guest, or as yourself. Users with accounts can create subfolders and organize their objects.

**Note:** Depending on your Preferences settings, your main page may look different.

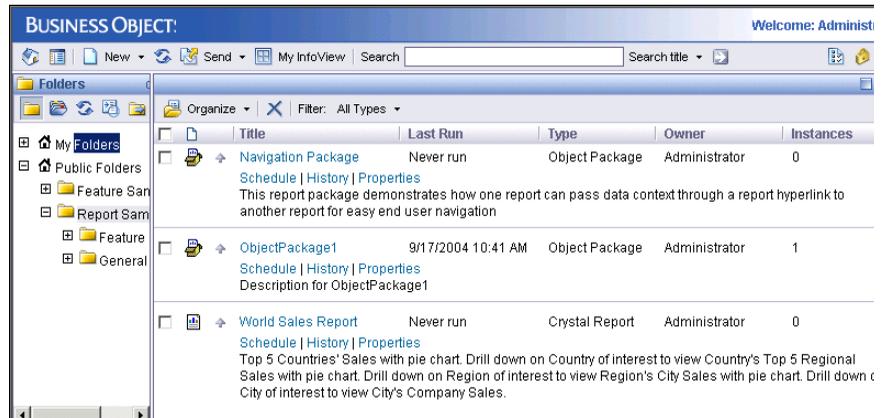
## Getting started

When reading through this guide, you can use sample report objects from BusinessObjects Enterprise to illustrate procedures.

**Note:** Sample objects are provided only for Windows installations.

## InfoView home page

Once you have logged on, the InfoView home page is displayed. To see objects, go to the navigation panel on the left and expand and then click on a folder.



The page is made up of a number of areas:

- **Title area**

This area contains the logo, the Search box, and the main toolbar. It also displays your user account name.

- **Navigation panel**

This area displays a tree representing your place in the structure of folders or categories, and it has its own toolbar.

To switch the view between folders and categories, click the folder or categories icon in the toolbar of the navigation panel. The objects for that folder or category are displayed in the objects area. For more information, see [“Organizing folders and categories” on page 34](#).

- **Objects area**

This area displays the objects in folder or subfolder, or objects assigned to a specific category. The objects area has its own toolbar, which you use to organize objects or change how objects are displayed. See [“Organizing objects” on page 36](#).

## Toolbar

Following is a brief description of the icons in the main toolbar.

Icon	Description
	Displays the InfoView home page.
	Hides or displays the navigation panel on the left of the window.
	Select the option you want, to create a new folder or category, or to add an object to a folder. See: <ul style="list-style-type: none"> <li>• “Creating folders or categories” on page 35</li> <li>• “Adding objects to a folder” on page 38</li> </ul>
	Refreshes the screen.
	Allows you to send an object or instance to a destination. See “Sending objects or instances” on page 52.
	Allows you to create custom dashboards. See “Creating dashboards for My InfoView” on page 39.
	Allows you to search for specific objects. See “Searching for objects” on page 37.
	Allows you to set your preferences for how information is displayed in InfoView. See “Selecting your preferences” on page 22.
	Click to log off.
	Displays the online help for InfoView.

## Selecting your preferences

This section shows how to modify your own BusinessObjects Enterprise preferences. This includes the following tasks:

- “Setting your general preferences” on page 23
- “Setting your Crystal Report preferences” on page 26
- “Changing your password” on page 27

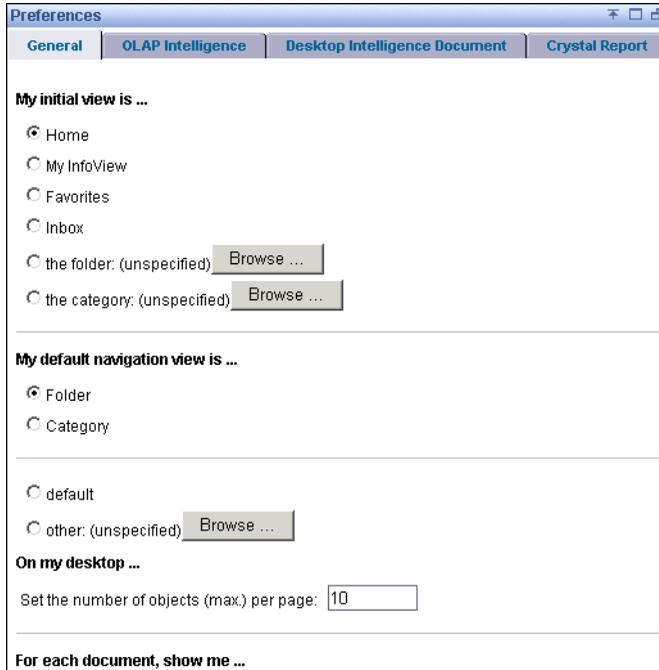
For information on setting Web Intelligence preferences, see “[Setting your Web Intelligence preferences](#)” on page 27.

## Setting your general preferences

▶ **To select general preferences**



1. In the toolbar in the InfoView window, click **Preferences**.  
The General Preferences page appears.



2. In the “My initial view is” area, click the option corresponding to the view you’d like to begin with.  
For example, if you choose Folders and then select Report Samples, the next time you log on the Report Samples folder will be displayed as your initial view.
3. In the “My InfoView is” area, select where you want My InfoView to be located.  
My InfoView allows you to configure a dashboard, which can display previously selected objects. For details, see [“Creating dashboards for My InfoView” on page 39](#).
4. In the “On my desktop” area, specify the maximum number of objects you would like to see displayed per page.
5. In the “For each object, show me” area, select the summary information you want your objects to show:
  - description
  - owner
  - date
  - instance count

- actions and descriptions (if selected) initially not hidden
6. In the “View my documents” area, select how you would like to view your reports.
  7. In the “My current locale is” area, select your current location.  
This setting determines the language set and the date format that the your browser will use.
  8. In the “My current time-zone is” area, select the appropriate time zone.  
**Note:** Before scheduling objects, check your time zone setting. The default time zone is local to the web server that is running BusinessObjects Enterprise, not to the Central Management Server (CMS) machine(s) that each user connects to. By setting your time zone, you ensure that your scheduled objects are processed in accordance with the time zone in which you are working.
  9. Click **OK**.

## Setting your SAP preferences

The SAP Preferences tab on the Preferences page of the <BOProductName>BusinessObjects InfoView for SAP allows you to choose whether SAP parameter descriptions are visible or hidden.

### ► To select SAP preferences

1. Click **Preferences** on the InfoView toolbar.  
The Preferences page opens.
2. Click the **SAP Preferences** tab.
3. In the **Parameter Description...** area, select one of the options.
  - **Show**  
If you want SAP parameter descriptions to be visible, select this option.
  - **Hide**  
If you do not want SAP parameter descriptions to be visible, select this option.

## Setting your Desktop Intelligence preferences



### ► To select Desktop Intelligence preferences

1. Click **Preferences** on the InfoView toolbar.  
The Preferences page opens.

2. Click the **Desktop Intelligence Document** tab.
3. In the Select a view format area, select one of the listed formats.
  - **HTML**  
If you want to be able to view documents and respond to prompts, select HTML.
  - **Portable Document Format (AdobeReader required)**  
If you want to be able to view and print documents, select this option.
  - **<BOProductName>BusinessObjects Format (Windows only)**  
If you want documents to open in Desktop Intelligence, select this option.  
**Note:** Desktop Intelligence must be installed on the local machine for this option to work.

## Setting your Crystal Report preferences



### ► To select Crystal Report preferences

1. In the toolbar in the InfoView window, click **Preferences**.
2. Click the **Crystal Report Preferences** tab at the top of the page.
3. In the “View my reports using the” area, select the report viewer you want to use when you display a report:
  - ActiveX viewer
  - DHTML viewer
  - Advanced DHTML viewer
  - Java viewer
- Note:** The DHTML viewer is selected by default.
4. In the “DHTML Viewer printing uses the” area, choose **Acrobat Reader printing control** or **ActiveX printing control**.
5. In the “Preferred measuring units for report page layout is” area, select **inches** or **millimeters**.
6. If you selected the DHTML viewer, then select the resolution you want in the “Rendering resolution (DHTML viewers)” area.
7. Click **Apply**.

### ► To select Web Intelligence preferences

For a detailed description of setting the Web Intelligence preferences, see “[Setting your Web Intelligence preferences](#)” on page 27.

## Changing your password

You can change your own password on the Password page.



► **To change your password**

1. In the InfoView main window, on the title bar, click **Preferences**.
2. Click the **Password** tab at the top of the page.
3. On the Password page, type your old password.
4. Type your new password, confirm it, and click **Submit**.

Your new password takes effect the next time you log on to BusinessObjects Enterprise.

## Setting your Web Intelligence preferences

Before you start to use Web Intelligence, you need to set your Web Intelligence Document Preferences appropriately to suit your query and reporting needs. This includes the following tasks:

- “[Selecting Web Intelligence viewing formats](#)” on page 27
- “[Setting your drill options](#)” on page 30
- “[Setting your personal preferences](#)” on page 31

## Selecting Web Intelligence viewing formats

You can select different view formats for Web Intelligence documents depending on how you want to interact with the information displayed on the reports. You select your Web Intelligence view options in InfoView. When you modify your view options, the new settings are implemented the next time you open a Web Intelligence document.



► **To select a format to view documents**

1. Click the **Preferences** button on the InfoView toolbar.
2. Click the **Web Intelligence Document Preferences** tab.  
The **Web Intelligence Document Preferences** page appears.
3. In the **Select a view format** section, select the view format you want.

The following table will help you select the appropriate format:

If you want to...	then select...
Open reports, answer prompts, navigate reports, and/or perform drill analysis,	<b>HTML</b>
Apply filters, sorts, calculations, modify formatting and data displayed on tables and charts, and/or perform drill analysis,	<b>Interactive</b>
View and print reports,	<b>Portable Document Format</b>

**Note:** Interactive view format is only available if you are using Web Intelligence deployed in JSP mode. To use the Query HTML panel, it is recommended you also select the Interactive view format. This will allow you to define and format documents in the Query HTML panel. If the Interactive view format is not selected, you can use the Query HTML panel to define documents, but you won't be able to format them.

**Note:** To open files in PDF format, you need Adobe Acrobat Reader installed on your computer. You can download Acrobat Reader free from the Adobe web site (visit [www.adobe.com](http://www.adobe.com)).

4. Click **OK**.

The new settings are activated the next time you open a Web Intelligence document.

## Selecting your Drill options

Before you begin a drill session, you specify how reports will change each time you drill by setting your drill options in InfoView. This section tells you about the following:

- “Available drill options” on page 28
- “Setting your drill options” on page 30

### Available drill options

#### Start drill on the existing report or on a duplicate report

When you drill on a report, you can either:

- **Start drill on the existing report** – the current report becomes drillable and when you end drill mode, the report displays the drilled values.

- **Start drill on a duplicate report** – InfoView creates a duplicate of the current report and you drill on the duplicate. When you end drill mode, both the original report and the drilled report remain in the document.

### Being prompted if a drill action requires additional data

When you drill the results displayed on a Web Intelligence report, you may want to drill to higher- or lower-level information that isn't included in the scope of analysis for the document. When this is the case, Web Intelligence needs to run a new query to retrieve the additional data from the data source.

Since queries on large selections of data can take a significant time to be completed, you can choose to be prompted with a message every time a new query is necessary. The prompt message asks you to decide whether you want to run the additional query or not. In addition, the prompt allows you to apply filters to the extra dimensions you include in the new query. This means you can restrict the size of the query to just the data necessary for your analysis.

**Note:** You need permission from your administrator to drill out of the scope of analysis during a drill session.

### Synchronizing or not synchronizing drill on all blocks in the report

Each table, chart, or free-standing cell in a report represents a specific block of data. There are two ways to drill on a report with multiple report blocks:

- synchronize drill on report blocks
- drill on only the selected block

The following examples show how each option affects a report as you drill down on the Bahamas Beach resort in a table to analyze detailed results per service line.

In the first example, Synchronize drill on report blocks is selected in your view options, so both the table and the chart display the drilled values. In the second example, Synchronize drill on report blocks is not selected in your view options so only the table displays the drilled value.

### Showing or hiding the Drill toolbar

When you start drill mode, the **Drill toolbar** automatically appears at the top of the drilled report. The toolbar displays the value(s) on which you drilled. These values filter the results displayed on the drilled report.

For example, if you drill on year 2001, the results displayed on the drilled table are the Q1, Q2, Q3, and Q4 for year 2001. This means that the quarterly values you drilled to are filtered by 2001. The Drill toolbar displays the value that filters the drilled results.

**Note:** If the drilled report includes dimensions from multiple queries, a ToolTip appears when you rest your cursor on the value displayed on the filter. The ToolTip displays the name of the query and the dimension for the value.

The **Drill toolbar** allows you to select other values in order to filter the results differently. For example, if you use the **Drill toolbar** to select 2002, the results displayed on the drilled table would be Q1, Q2, Q3, and Q4 for year 2002.

You can opt to hide the **Drill toolbar** when you start drill mode. This is useful if you do not want to select filters during your drill session.

### Setting your drill options

You set your drill options in InfoView. When you modify your drill options, the modifications are implemented the next time you start Drill mode.

► **To set your drill options**



1. On the InfoView toolbar, click **Preferences**.

2. Click the **Web Intelligence Document Preferences** tab.

The **Web Intelligence Document Preferences** page appears.

3. Verify that in the **Select a view format** section either **HTML** or **Interactive** is selected.

For information about the difference between these view formats, see [“To select a format to view documents” on page 27](#).

4. In the **For each new drill session** section, select the drill option that corresponds to whether you want to keep a record of the report results or not before you modify those results using drill:

If you want Web Intelligence to...	then select...
retain a copy of the original report, so that you can compare the drilled results to the results on the original report,	<i>Start drill on a duplicate report</i>
drill on the existing report, so that the original report becomes modified by your drill actions,	<i>Start drill on the existing report</i>

- In the **General drill options** section, select the options that you would like to apply during your drill sessions:

If you want Web Intelligence to...	then select...
prompt you whenever a drill action requires a new query, so that Web Intelligence can extend the scope of analysis and add more data to reports,	<i>Prompt if drill requires additional data</i> For more information, see <a href="#">“Being prompted if a drill action requires additional data”</a> on page 29.
synchronize drilling on all report blocks,	<i>Synchronize drill on report blocks</i> For more information, see <a href="#">“Synchronizing or not synchronizing drill on all blocks in the report”</a> on page 29.
hide the <b>Drill toolbar</b> when you switch to drill mode,	<b>Hide drill toolbar</b> For more information see <a href="#">“Showing or hiding the Drill toolbar”</a> on page 29.

- To apply the new drill settings, click **OK**.  
 The modifications are implemented the next time you open a Web Intelligence document and start Drill mode.

## Setting your personal preferences

You can choose personal preferences for how you want Web Intelligence to appear on your desktop and how you want some of the reporting options to be applied every time you use them.

- **My Workspace** preferences – define how the Web Intelligence, toolbars, and menus appear on your desktop
- **Reporting Rules** – define how Web Intelligence applies reporting options (such as breaks, sorts, and drill), when you use them on reports

**Note:**

- To set these preferences, you must be using the Java InfoView and have the View Format for Web Intelligence documents set to Interactive.

- If your security profile enables you to define the data included documents, by building queries, the ability to define your query rules is also available. For information about defining your query rules, see the *Building Queries Using the Web Intelligence HTML Query Panel* guide.
- To set these preferences you need to have a Web Intelligence document open.

► **To set the display properties of your Web Intelligence workspace**

1. With a Web Intelligence document open, click the arrow next to **View** on the main toolbar above the selected report.

For step-by-step information on how to open Web Intelligence documents, see the *Performing On-Report Analysis with Web Intelligence* guide.

2. Click **Preferences**.

The **Preferences** dialog box appears. You define how you want your workspace to appear, on the **General** tab.

3. Verify that the **General** tab is selected.
4. Select the appropriate options.

The following table provides information on the options:

If you want to...	then...
Adjust the measurement unit used to position the different elements on reports	<ul style="list-style-type: none"> <li>• Select the arrow next to <b>Measurement unit</b></li> <li>• Select <b>Inches</b> or <b>Centimeters</b></li> </ul>
When you use the contextual menu, display the name of the part of the report you have selected at the top of the menu	Select <b>Display the name of the selected report element on contextual menus</b>
Make the contextual menu available, when you place your pointer on areas of reports	Select <b>Activate contextual menu using mouse over</b>
Make the contextual menu available, when you right-click areas of reports	Select <b>Activate contextual menu using right-click</b>
Deactivate the contextual menu, and only use the toolbar buttons and menus to interact with reports	Select <b>Do not activate contextual menus</b>

5. To apply the selected preferences, click **OK**.

► **To define your reporting rules**

1. Click the arrow next to **View** on the main toolbar above the selected report.

2. Click **Preferences**.

The **Preferences** dialog box appears. You define how you want your workspace to appear, on the **General** tab.

3. Verify that the **Reporting rules** tab is selected.

4. Select the appropriate options.

The following table provides information on the options:

If you want to...	then...
Apply the formatting options you select for reports automatically, as soon as you select each option	Check <b>Apply format modifications automatically</b>
Display column and row headers on tables without breaks	Check <b>Always display headers on tables</b>
Apply the last sort you add on a table first	Select <b>The last sort added always takes precedence</b>
Apply the last sort you add on a table last	Select <b>The last sort added is applied after any other sorts</b>
During a drill session, highlight cells you select for drill with the color and font format you specify	Select <b>Apply custom highlighting to drillable cells when selected, as defined here</b> <ul style="list-style-type: none"> <li>• To format selected cells with underlined text, click <b>Underline</b></li> <li>• To format selected cell backgrounds with a color, click the arrow next to <b>Background Color</b>, then select a color</li> <li>• To format selected cell contents with a color, click the arrow next to <b>Text Color</b>, then select a color</li> </ul>

**Note:** For more information on the above tasks, see the *Performing On-Report Analysis with Web Intelligence* guide

5. To apply the selected preferences, click **OK**.

## Organizing folders and categories

Organizing folders and categories includes:

- [“Accessing your folders or inbox” on page 34](#)
- [“Accessing categories” on page 34](#)
- [“Adding objects to a folder” on page 38](#)

### Accessing your folders or inbox

The Favorites folder is your own personalized version of BusinessObjects Enterprise. The Favorites folder contains the folders (those you selected or created) and objects you selected on the Organize Folders page.

The Inbox is your personal inbox. You can schedule objects to your inbox, or send object or instances directly to your own inbox, or the inboxes of other users.

For more information, see [“Destination locations” on page 44](#) and [“Sending objects or instances” on page 52](#).

#### ► To access your folders or your Inbox



1. In the navigation panel, click the **Show Folder** on the toolbar.

The folders are displayed in the navigation panel. By default, My Folders and Public Folders are displayed.

2. Expand **My Folders**.
3. Click **Favorites** or **Inbox**, or click the plus sign besides these name to expand them.

To see the sub-folders for a folder, click the plus sign beside the folder or inbox name.

### Accessing categories

Like folders, categories are objects used to organize documents. You can assign objects to one or more categories, and you can create subcategories within categories.

BusinessObjects Enterprise provides two types of categories:

- *Personal* categories, which appear un My Categories in the navigation panel. You can create any number of personal categories to organize your documents and objects.

- Administrative (or *corporate*) categories are created by the administrator, or other users who have been granted access to these categories. If you have the appropriate rights, you can create corporate categories.

For more information, see also [“Assigning objects to a category” on page 38](#).



► **To access categories**

1. In the navigation panel, click **Show Categories**. My Categories and Corporate Categories appear in the navigation panel.
2. Expand either category by clicking the plus icon beside its name.  
To see the sub-categories, click the plus sign beside a category name.
3. Click the category name. The objects that have been assigned to that category appear in the objects area.

## Navigating through folders or categories

Folders and subfolders, and categories and subcategories are used to organize objects. Although these folders look different from those used in some web applications, they function in the same way.

► **To navigate through folders or categories**

1. In the navigation panel, click **Show Folders** or **Show Categories** as needed.
2. Expand the folder or category you want to view by clicking the plus icon beside the folder or category name.  
Repeat this step until you see the folder or category you want.
3. Click the folder or category of your choice.  
The appropriate folder or category page appears displaying the objects

## Creating folders or categories

Folders and subfolders, and categories and subcategories are created for you by your BusinessObjects Enterprise administrator, but you can also create folders in your Favorites folder, or categories under My Categories.

**Note:** You can create new folders or categories, as long as you have the necessary rights.

► **To create a folder or category**

1. In the navigation panel, click **Show Folders** or **Show Categories** as needed.
2. Navigate to the folder or category that you want to add a to.

3. From the **New** list in the toolbar, select **Folder** or **Category**.  
The New Folder or New Category page is displayed.
4. Type the name for the new folder or category.
5. If you want, type a description for the folder or category.
6. In the Keywords field, type a keyword if required.  
You can use keywords when using the search feature. See [“Searching for objects” on page 37](#).
7. Click **OK**.

## Organizing objects

This section tells you how to view and manage objects. It includes:

- [“Viewing objects” on page 36](#)
- [“Adding objects to a folder” on page 38](#)
- [“Assigning objects to a category” on page 38](#)

## Viewing objects

Viewing objects includes the following tasks:

- [“Selecting which objects are displayed” on page 36](#)
- [“Sorting objects” on page 37](#)
- [“Searching for objects” on page 37](#)

### Selecting which objects are displayed

By default, BusinessObjects Enterprise shows you all the objects you have the rights to see in your view. If you want to temporarily limit the type to make searching easier, you can choose to display objects of a specific type. Object types include Crystal reports, Web Intelligence documents, Excel, PowerPoint, program objects, object packages, text files, and many others.

To change the order in which objects are displayed, see [“Sorting objects” on page 37](#).

#### ► To select which objects are displayed

1. In the objects area on any view, click the **Filter** list.
2. Select the type of object you want to see.  
To see all objects again, select **All Types** from the **Filter** list.

## Sorting objects

By default, objects are sorted alphabetically by title. You can reverse this order, or you can sort the objects by last run date, type or owner.

### ▶ To sort objects

- Click the heading for the column that you want to sort by.

For example, to sort the object by title, click the **Title** column heading. To sort objects by date run, click **Last Run** column heading.

When you click the column heading, the system sorts the objects in ascending order. When you click the column heading again, it sort the objects in descending order.

## Searching for objects

You can do a structured search to find objects on BusinessObjects Enterprise. Type the exact phrase and select a search field, such as title or description.

The objects displayed depend on how your BusinessObjects Enterprise administrator has set up your account privileges. For example, users in Marketing may see objects that differ from those seen by the users in Human Resources. For more information, see the *BusinessObjects Enterprise Administrator's Guide*.

**Note:** A search includes all public folders you have rights to as well as your Favorites folder.

### ▶ To search for an object

1. In the **Search** box on the menu bar, type the words that you want to search for.

2. Click the list next to the search box to select a search field.

The available search fields are:

- all fields
- title
- description
- keyword

3. Click **Execute Search**.

A list of objects meeting your search parameters appears.

4. To view the latest instance of the object, click the **View Latest Instance** link under the object name.

To view a older instance, click the **History** link, then click the link for the instance you want to view. See also [“Looking at the object history” on page 48.](#)

## Adding objects to a folder

Use the following procedure to add existing objects to a folder. To add an object to a folder, you must have the right to access the folder.

► **To add objects to a folder**

1. From the **New** list in the toolbar, select the type of object you want to add.  
The add a document page is displayed.  
For example, you can select **Document from local computer** and then select a **Crystal Report**.
2. If you want, type a title and description.  
If you don't enter a title, the file name for the object will appear in Title column instead. The description is also optional. You can view the description on the Properties page for the object.
3. In the Keywords field, type any keywords you want to use for this object.  
Keywords can be used to search for an object. See [“Searching for objects” on page 37.](#)
4. In the Filename field, type the name of the file, or click the **Browse** button to locate the file.
5. In the Location field, specify the folder you want to add the object to, or click the **Browse** button to select a location.
6. In the categories area, assign the object to one or more categories as needed.  
For more information, see [“Assigning objects to a category” on page 38.](#)
7. Click **OK**. The object is added to folder

## Assigning objects to a category

Like folders, categories can be used to organize documents. You can assign objects to one or more categories, and you can create subcategories within categories.

BusinessObjects Enterprise provides two types of categories:

- *Personal* categories, which appear under My Categories in the navigation panel. You can create any number of personal categories to organize your documents and objects.
- Administrative (or *corporate*) categories are created by the administrator, or other users who have been granted access to these categories. If you have the appropriate rights, you can create corporate categories.

For more information, see [“Accessing categories” on page 34](#).

► **To assign an object to a category**

1. Navigate to the folder or category containing the object you want to assign.
2. Click the **Properties** link for the object.  
The Properties page is displayed.
3. In the Categories area, select the categories that you want to assign this objects to.  
Click the plus icon beside the category names to expand the list of categories and navigate to the category you want.
4. Click **OK**.

## Creating dashboards for My InfoView

From InfoView you can access the Dashboard Manager, which allows you to create dashboards. A dashboard contains user defined settings and can include web sites and objects, such as reports or documents. You can create one or more dashboard and display them as needed.

For example, you can create a dashboard that contains a website, or Crystal reports or Web Intelligence documents that you frequently access. To view the dashboard, you can either make the dashboard your default view, or you can click its link in the navigation panel. The default name for a dashboard is My InfoView, and its default location is your Favorites folder.

In your preferences, you can specify to have a dashboard displayed as the initial view when you start InfoView. For more information, see [“Selecting your preferences” on page 22](#). For complete details, refer to the *Dashboard Manager User’s Guide*.

► **To create a dashboard for My InfoView**



1. Click **My InfoView** in the toolbar.  
The My InfoView page is displayed.
2. Choose a template.

The templates include frames that determine the layout of the objects in your dashboard. Each box in the template frame can contain one object.

3. Click **Define Content**.

The dashboard properties dialog box appears.

4. Select the items or objects you want to include.

For example, you can include a web address or an object. You can also specify a header and footer for each box in the dashboard.

5. Click **Save**.

The system saves the dashboard as "My InfoView." The default location for My InfoView is your Favorites folders.

You can create multiple version of My InfoView by using the Save As button.



► **To display a dashboard in the initial view**

1. In the toolbar in the InfoView window, click **Preferences**.

2. In the "My initial view is" area, click the option corresponding to the view you'd like to begin with.

Select **My InfoView** to set the dashboard as your initial view. To associate a different dashboard with the "My InfoView" button, select the dashboard you want in the My InfoView area on the Preferences page.

3. Click **OK**.

► **To display a dashboard at anytime**

1. Go the folder containing the My InfoView object.

The default location is your Favorites folder.

2. Click the link for the InfoView you want.

## Working with objects

Once you've accessed and logged on to BusinessObjects Enterprise, you can begin to work with objects. Working with objects includes the following tasks:

- ["Scheduling objects" on page 41](#)
- ["Looking at the object history" on page 48](#)
- ["Looking at alerts" on page 50](#)
- ["Setting the object properties" on page 51](#)
- ["Sending objects or instances" on page 52](#)

**Note:** Your ability to perform any of these tasks is determined by the rights assigned to you by your BusinessObjects Enterprise administrator.

## Scheduling objects

Scheduling an object lets you run it automatically at specified times. When a scheduled object runs successfully, an instance is created. An instance is a version of the object containing the data available at the time it was run—instances created later contain more recent data.

You can see a list of instances by looking at an object's history, and you can click the link to any historical instance. If you have the rights to view objects on demand, you can view and refresh any instance to retrieve the latest data from the database.

By scheduling and viewing instances, you can ensure you have the latest information available for viewing, printing, and distributing. For example, you can schedule a report object to run every night so it's available for you first thing in the morning.

**Note:** Before scheduling objects, check your time zone setting on the Preferences page in BusinessObjects Enterprise. The default time zone is local to the web server that is running BusinessObjects Enterprise, not to the Central Management Server (CMS) machine(s) that each user connects to. By setting your time zone, you ensure that your scheduled objects are processed in accordance with the time zone in which you are working. You must have your own account on the system in order to set your preferences.

Depending on the type of object you are scheduling, you might want to customize your scheduling options. You can set:

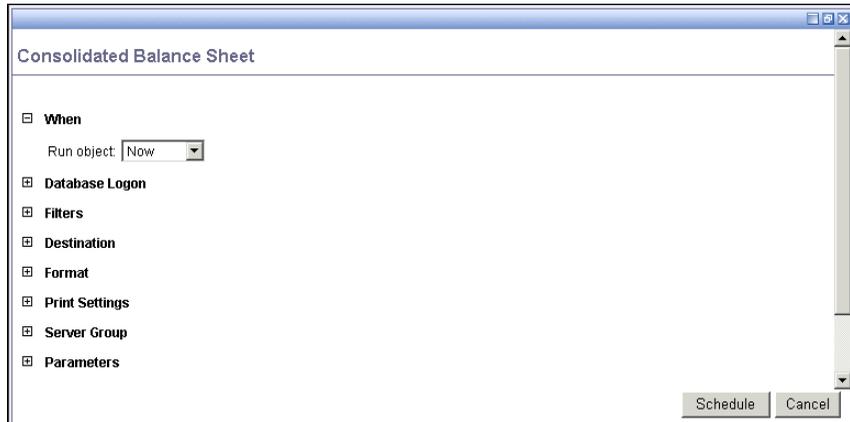
- [When to run a scheduled object](#)
- [Database logon information](#)
- [Filters](#)
- [Destination locations](#)
- [Format](#)
- [Print settings](#)
- [Server group settings](#)
- [Parameters](#)

**Note:** For some scheduling options, the settings that the administrator has specified for the object will be displayed when you choose that option. You can schedule a object with these options or customize your options.

► **To schedule an object**

1. Navigate to the object you want to schedule.
2. Click the **Schedule** link for the object.

The Schedule page appears.



3. Select and specify the scheduling options you want to use.

To see the fields for each option, click the plus icon beside the option to expand the options. For detailed information, see the following sections:

- [“When to run a scheduled object” on page 42](#)
- [“Database logon information” on page 43](#)
- [“Filters” on page 44](#)
- [“Destination locations” on page 44](#)
- [“Format” on page 45](#)
- [“Print settings” on page 47](#)
- [“Server group settings” on page 47](#)
- [“Parameters” on page 48](#)

4. Click **Schedule**.

## When to run a scheduled object

**When** specifies a time for running a scheduled object. Each parameter in the “Run object” list has its own specific data entry requirements.

**Note:** For every parameter listed below (except for the “Now” parameter), you can specify both start and end dates and times.

The following parameters are available:

- **Now**  
When you click Schedule, the object runs once (immediately).
- **Once**  
This option requires a start time parameter. The object runs once at the time specified.
- **Hourly**  
This option requires information in hours and/or minutes for how frequently the object should run. Instances are created regularly to match the parameters you entered. The first instance is created at the start time specified.
- **Daily**  
This option requires a start time parameter. The report runs once every N days at the time specified.
- **Weekly**  
This option requires a start time parameter. Each week, the report runs on the selected days at the time specified.
- **Monthly**  
This option requires a start date and time, along with a recurrence interval in months. The report runs on the specified date and time, every N months.
- **Calendar**  
This option allows you to select a calendar of dates. Created by the BusinessObjects Enterprise administrator, calendars are customized lists of schedule dates. An instance is created on each day specified in the calendar.

## Database logon information

Some objects require you to log on to a database before you can schedule them successfully. You can do this on the Schedule page if you have credentials for the object's data source.

- ▶ **To schedule a report object with database logon information**
  1. Expand the **Database Logon** option on the Schedule page.
  2. Change information as necessary for your report's database.
  3. Set other scheduling parameters as required, then click **Schedule**.

## Filters

If a report object includes a record or group selection formula, you can modify it before you schedule the report. Selection formulas help determine what data appears in a report and may improve performance by eliminating unwanted records. For more information on selection formulas, see the *BusinessObjects Enterprise User's Guide*.

► **To schedule a report object with a record selection formula**

1. Expand the **Filters** option on the Schedule page.
2. Change the record or group selection formula as necessary.
3. Set other scheduling parameters as required, then click **Schedule**.

## Destination locations

You can schedule an object instance to be sent to a specific destination on your computer or network, to a default file location, to email, or to FTP. For destination options other than Default, you can choose the preset settings (as determined by your administrator) or enter specific requirements for the destination.

You can choose from the following destinations:

- **Default Enterprise location**

If you select this option, the instance is saved to the default BusinessObjects Enterprise location, which is the Output File Repository Server (FRS).

- **Default inbox or Specific inbox**

Both options will save the instance to the default BusinessObjects Enterprise location as well as to inboxes as specified:

- If you select the **Default inbox**, copies of the instance are also saved to the inboxes configured on the job server.
- If you select **Specific inbox**, you can specify whose inboxes you want to save the instance to.

- **Default file location or Specific file location**

Both options will save the instance to the default BusinessObjects Enterprise location as well as to the specified file location:

- If you select **Default file location**, copies of the instance are also saved to the Unmanaged disk location configured for the job server.
- If you select **Specific file location**, copies of the instance are also saved to the file location you specify here.

- **Default email recipients or Specific email recipients**

Both options will save the instance to the default BusinessObjects Enterprise location as well as to the specified email recipients:

- If you select the **Default email recipient**, copies of the instance are also emailed to the email recipients configured on the job server.
- If you select **Specific email recipient**, you can specify who you want to email the instance to.
- **Default FTP server** or **Specific FTP server**

Both options will save the instance to the default BusinessObjects Enterprise location as well as to the specified FTP server:

- If you select the **Default FTP server**, copies of the instance are also saved to the FTP server configured on the job server.
- If you select **Specific FTP server**, you can specify which FTP server you want to save the instance to.

**Note:** If you select any option other than “Default Enterprise Location,” the location must have been configured on the respective job server by your administrator. For more information, see the *BusinessObjects Enterprise Administrator’s Guide*.

If the administrator has specified a particular destination for the object, this destination option will be displayed. You may be able to update the fields for this destination, or select a different destination. For many of these destinations, you must provide additional information.

► **To specify a destination**

1. Expand the **Destination** option on the Schedule page.
2. In the **Destination** list, click the format of your choice.
3. If you select a "Specific" destination, enter the destination information.  
For example, if you select Specific inbox, you have to choose which user or user group you want.
4. Set other scheduling parameters as required, then click **Schedule**.

## Format

### Web Intelligence document formats

For Web Intelligence documents, you can select the format that the document will be saved in when it is generated. You can select from the following formats:

- WebIntelligence
- Microsoft Excel
- Adobe Acrobat

### Crystal report formats

For Crystal report objects, you can select the format that a report instance will be saved in when it is generated by BusinessObjects Enterprise. You can select from the following formats:

- Crystal Report
- Excel
- Excel (Data Only)
- Word
- Acrobat
- Rich Text
- Plain Text
- Paginated Text
- Tab-separated Text
- Tab-separated Values
- Character-separated Values

#### Note:

- When you select file format other than Crystal Reports (.rpt), you may lose some or all of the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.
- The difference between Excel and Excel (Data only) is that Excel attempts to preserve the look and feel of your original report, while Excel (Data only) saves only the data, with each cell representing a field.
- The Tab-separated Values format places a tab character between values; the Character-separated Values format places a specified character between values. Each of these two formats produce data lists. In contrast, the Tab-separated Text format attempts to preserve the formatting of the report.

#### ► To specify a report format

1. Expand the **Format** option on the Schedule page.
2. In the **Format** list, click the format of your choice.
3. Select additional formatting options as required.  
Some format options require you to specify additional formatting options. These options vary, depending on the format you selected in step 2.
4. Set other scheduling parameters as required, then click **Schedule**.

## Print settings

When scheduling an object, you can choose to print the report instance once it has been generated. Report instances are always printed in Crystal Reports format. When printing a report, you can set the number of copies and the page range. When you choose to print the report instance, you have to specify several other print settings, such a printer and page range.

### ► To set the print settings for a report

1. Expand the **Print Settings** option on the Schedule page.
2. In the **Print** list, select the option you want:
  - To print the report, select **Crystal Report**.
  - If you don't want the report to be printed, select **None**.
3. If you selected Crystal Reports, specify the additional print settings.
4. Set other scheduling parameters as required, then click **Schedule**.

## Server group settings

When scheduling an object, you can select which server group you want the system to use to run the object.

### ► To set the server group settings

1. Expand the **Server Group** option on the Schedule page.
2. Select the server group option you want.
3. Set other scheduling parameters as required, then click **Schedule**.
  - **Use the first available server**

This is the default. BusinessObjects Enterprise will use the server that has the most resources free at the time of scheduling.
  - **Give preference to servers belonging to the selected group**

Select a server group from the list. This option will attempt to process the object from the servers that are found within your server group. If the specified servers are not available, then the object will be processed on the next available server.
  - **Only use servers belonging to the selected group**

This option ensures that BusinessObjects Enterprise will only use the specified servers that are found within the selected server group. If all of the servers in the server group are unavailable, then the object will not be processed.

## Parameters

Some objects use the parameters feature. Parameters prompt the user to enter information. For report objects, this information may determine what data appears in the report. For example, in a report used by sales, there might be a parameter that asks the user to choose a region. The report returns the results for the specific region instead of returning the results for all of the regions.

You can set parameters on the Schedule page. If the object you schedule does not contain parameters, the Parameter link does not appear on the Schedule page.

### ► To schedule an object with parameters

1. Expand the **Parameters** option on the Schedule page.
2. Select the parameter you need for your object and click **Add**.

**Note:** The appearance of the parameter prompts on the Schedule page may differ from object to object depending on how the parameter field was created in Crystal Reports. Program objects may provide an Argument box.

3. Set other scheduling parameters as required, then click **Schedule**.

## Looking at the object history

BusinessObjects Enterprise saves a history of object instances for scheduled objects that have been run. The history list is arranged chronologically (with the most recent instances first) and contains information such as:

- Instance Time
- Run By
- Parameters
- Format
- Status
- Reschedule

The Instance Time for a successful instance becomes a hyperlink to that instance. You can view the instance by clicking the hyperlink.

### Tip:

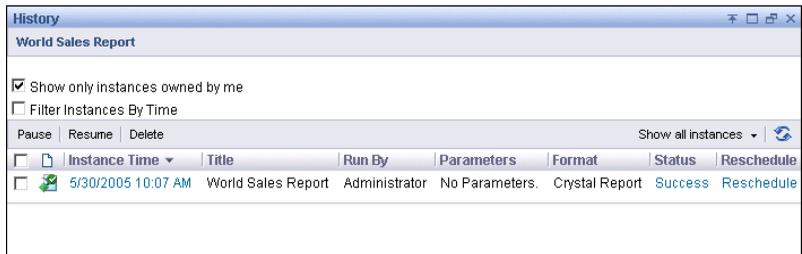
- Sort instances chronologically by clicking the "Instance Time" column heading. Click the column again to reverse the sort order. Or, sort instances by owner (alphabetically and reverse-alphabetically) by clicking the "Run By" column heading, or by Status by clicking the "Status" column.

- Use the Delete, Pause, and Resume buttons in the History page to delete a selected object, to pause an instance, or to resume a paused instance. Choose an object from the “Selected” column and click either the Delete, Pause, or Resume button.

► **To view an object’s history**

1. Navigate to the object you want.
2. Click the **History** link for the object.

The History page appears.



You can see detailed status information for recurring and failed instances by clicking the link(s) under the Status column.

You can choose to display all instances or only completed instances by selecting the option you want from the list in the top right corner.

3. Click the link(s) under the **Instance Time** column to launch the object instance.

When you launch a report object instance, it opens in a report viewer.

When you launch a program object instance from the History, an output file appears, displaying the program’s standard out and standard error information.

## Pausing or resuming an instance

You can pause and then resume an instance as needed. Pause and resume can be applied to scheduled instances only, that is, instances that have a status of Recurring or Pending.

For example, if a job server is down for maintenance reasons, you may want to pause a scheduled instance. This prevents the system from running the object, and the object from failing because the job server is not running. When the job server is running again, you can resume the scheduled object.

▶ **To pause and resume an instance**

1. Go to the History page for an object.
2. Select the check box for the scheduled instance you want to pause.
3. Click **Pause**.

▶ **To resume an instance after pausing it**

1. Go to the History page for an object.
2. Select the check box for the scheduled instance you want to resume.
3. Click **Resume**.

## Deleting an instance

You can delete instances from an object as needed. You can delete both scheduled instances, which have a status of recurring or pending, and report or program instances, which have a status of success or failed.

▶ **To delete an instance**

1. Go to the History page for an object.
2. Select the check box for the instance or instances you want to delete.
3. Click **Delete**.

## Looking at alerts

BusinessObjects Enterprise tracks report instances that trigger Alerts. Alerts are custom messages created in Crystal Reports that appear when certain conditions are met by report data. Alerts may indicate action to be taken by the user or information about report data.

▶ **To view Alerts**

1. Click a report's link; then click **Alerts**.

The Alerts page appears.

The object has these alerts...

Filter Instances By Time

Start: Monday, October 04, 2004 5:28 PM

End: Monday, October 04, 2004 5:28 PM

Refresh

- Alerting Report**  
No description available  
**Folder:** Report Samples > Feature Examples  
*Last Updated on: 10/4/2004 5:27:43 PM*  
**Sales:** Sales are greater than 5,000.00

**Note:** You can click the Alerts link only for reports that contain Alerts. The Alerts page displays only those instances that triggered the alert.

2. Click the Alert link to launch the report instance in a Crystal report viewer.

## Setting the object properties

Provided you have sufficient access rights, you can change the following properties for an object:

- Title
- Description
- Keywords
- Categories

### ► To set the object properties

1. Navigate to the report whose properties you want to set.
2. Click the **Properties** link for the report.  
The Properties page appears.
3. Change the title, description, or keywords for the object as needed.
4. In the Categories area, select the categories that you want this object to be assigned to, if required. Otherwise skip this step.
5. Click **OK**.

## Sending objects or instances

You can use the “Send” feature to send existing objects or instances of an object to different destinations. You can send an object, for example, a Word or Excel file, or you can send instances of an object, for example, a report instance.

The “Send to” function handles existing objects or instances only. It does not cause the system to run the object and create new instances, nor does it refresh the data for a report instance.

You can send either a copy of an object or instance, or a shortcut to the object or instance. You can also select the destination, for example, FTP or Inbox. Not all types of objects can be sent to all destinations. For details about which types of objects can be sent to which destinations, see [“Available drill options” on page 28](#).

### ► To send an object or an instance to a destination

1. Navigate to the object you want to send.

To send in instance, click the **History** link for the object. The History page is displayed.

2. Select the check boxes for the objects or instances that you want to send.

Select only instances with a status of Success or Failed. Instances with a status of Recurring or Pending are scheduled and do not contain any data yet.

3. From the **Send** lists in the toolbar, select destination you want to send the object or instance to.

The destinations are:

- BusinessObjects Inbox
- Email
- FTP Location
- File Location

The Send to page appears. For information about the destination, see [“Destination locations” on page 44](#).

4. Specify the additional destination information as required.

For example, if you selected to send the object to a BusinessObjects Inbox, you must select which users you want to send the object to.

The screenshot shows a dialog box titled "Send Alerting Report to users". It contains the following elements:

- Document Title:** Alerting Report
- Description:**
  - Created:** 9/30/2004 1:52 PM
  - Last Modified:** 9/30/2004 1:52 PM
  - Last Run On:** Never
- Choose:** Users (dropdown menu)
- Look For:** (text input field) and **Search** (button)
- Available Recipients:** A list box containing Administrator, Guest, User1, User2, and User3. The "Administrator" entry is selected.
- Selected Recipients:** An empty list box.
- Between the recipient lists are buttons: ">" (arrow), "Add", "Rem", and "Rem".
- Target Name:**  Automatically generated,  Specific name (with an "Add placeholder..." dropdown).
- Send As:**  Shortcut,  Copy,  Cleanup instance after scheduling.
- Submit** (button)

5. To keep the temporary copies of the instances, which are created when you send an object or instance, deselect **Clean up temporary objects created after objects have been sent**.

By default, this option is selected and the system deletes any temporary copies of objects or instances after they have been sent.

6. Click **Submit**.

The system sends the objects or instance to the specified destination.

**Note:** When you use the Send feature, the system does not refresh the data in the reports. Instead, it sends the existing object, for example, a Word file, or the existing report instance to the destination.

## Desktop Intelligence Publications

The <BOProductName>BusinessObjects InfoView for SAP allows you to work with Desktop Intelligence documents as you would in the regular InfoView. You are able to publish Desktop Intelligence documents, view them, and use report bursting and subscription to schedule and dispense them to users.

### Report Bursting

Report bursting is an efficient way to quickly deliver information from Desktop Intelligence documents to users. The Enterprise system enables you to schedule a publication so that instances are created for individual users or groups based on their security profiles.

For details on how to configure report bursting, refer to the *BusinessObjects Enterprise Publisher User's Guide* at [http://support.businessobjects.com/library/docfiles/cps10/docs\\_en.asp](http://support.businessobjects.com/library/docfiles/cps10/docs_en.asp). Refer specifically to the chapters entitled *Creating Publications* and *Modifying Publications*.

## Working with Web Intelligence documents

You create Web Intelligence documents by building one or multiple queries. The queries define the data content of the document and its reports. You can edit the queries upon which a document is based at any time.

This section describes the following tasks:

- “Creating documents” on page 54
- “Editing the queries in existing documents” on page 55

**Note:** Before you can create documents or edit queries using the HTML Query Panel, you need to verify that the HTML Query Panel is selected on the **Web Intelligence Document Preferences** page in InfoView. To find out how to do this, see the *Building Queries Using the Web Intelligence HTML Query Panel* guide.

### Creating documents

You create Web Intelligence documents by selecting a universe in InfoView. Each universe maps to a database containing corporate business information. When you connect to a universe, Web Intelligence automatically launches the document editor selected on the **Web Intelligence Document Preferences** page in InfoView.

For information on how to select the HTML Query Panel, see *Building Queries Using the Web Intelligence HTML Query Panel* guide.

► **To select a universe for a new document**

1. On the InfoView Home page, click **New Document**.
2. Click the title of the universe on which you want to create a document.



The Web Intelligence HTML Query Panel opens.

To see how to build documents using the Web Intelligence HTML Query Panel, see the *Building Queries Using the Web Intelligence HTML Query Panel* guide

## Editing the queries in existing documents

You can edit the queries upon which documents are based at any time. This enables you to modify the data definition behind reports as your corporate data and business needs evolve.

► **To switch to Edit Query mode while viewing reports**

1. Make sure you are logged into InfoView.

For full information, refer to “[Accessing and logging on to BusinessObjects InfoView for SAP](#)” on page 12.

2. On the InfoView home page, navigate to the document you want to open.

You do this by clicking the folders in **My Folders** or **Home**, or by entering a keyword or the title of the document in the **Search** box on the InfoView home page.

The list of documents appears.



3. Click the document title.
4. If the document contains any prompts that need to be refreshed, you need to select the value(s) you want returned to the document, and then click **Run Query**.
5. The results display on the reports.
6. Click **Edit Query**.

The HTML Query Panel appears and displays the queries defined for the document.

To find out how to modify the queries, see the *Building Queries Using the Web Intelligence HTML Query Panel* guide.

## Viewing reports and Web Intelligence documents

You can view the latest instance, or an older instance, of a report or Web Intelligence document. If you have View On Demand rights, you can also choose to view a report of document with the latest information from the database.

**Note:** For information on using the HTML Query Panel, see *Building Queries Using the Web Intelligence HTML Query Panel* guide. For information on using the Java Report Panel, see *Building Reports Using the Web Intelligence Java Report Panel* guide. For information on using the Accessible HTML Report Panel, see *Building Reports Using the Web Intelligence Accessible HTML Report Panel* guide.

### ► To view a report or Web Intelligence document

1. Go to the folder containing the object you want to view.  
You can use the search feature if you want. See [“Searching for objects” on page 37](#).
2. Depending on what you want to do and your viewing rights, do one of the following:
  - To view the latest instance of the object, click the **View Latest Instance** link under the object name.
  - To view an older instance of the object, click the **History** link, then click the link for the instance you want to view. See also [“Looking at the object history” on page 48](#).
  - To view the object with current data, click the link for the object.

- If you have View On Demand rights, the system displays the report or document with the latest data from the database.
- If you don't have View On Demand rights, the latest instance of the report or document is displayed.



3. If you have View On Demand rights, you can click the **Refresh Page** button at any time to refresh the report or document with the latest data from the database.





Viewing Reports



6  
chapter



## The default Crystal report viewers

The default Crystal report viewers allow you to view reports, navigate through multiple pages, refresh data, drill down to see details behind charts and summarized data, select parameters, and so on. As well, the viewers have powerful printing and exporting capabilities.

The online Crystal report viewers support ActiveX, Java, and DHTML. Your BusinessObjects Enterprise administrator can select the viewer type best suited to your company's needs. You can also manually select your preferred viewer type through the Preferences page. For more information, see ["Selecting your preferences" on page 22](#). The selected viewer is launched each time you choose to view a report.

You can view your reports using any of the following online Crystal report viewers:

- ["ActiveX viewer" on page 61](#)  
The ActiveX viewer is for Microsoft Internet Explorer versions that support ActiveX controls.
- ["DHTML viewer" on page 62](#)  
The DHTML viewer is a zero-client viewer for browsers that support Dynamic HTML.
- ["Advanced DHTML viewer" on page 63](#)  
In addition to providing all of the features found in the DHTML viewer, the Advanced DHTML viewer is a zero-client viewer that provides an Advanced Search Wizard (for advanced searches using Boolean operators).
- ["Java viewer" on page 65](#)  
This viewer is designed for web browsers that support the Java Virtual Machine.

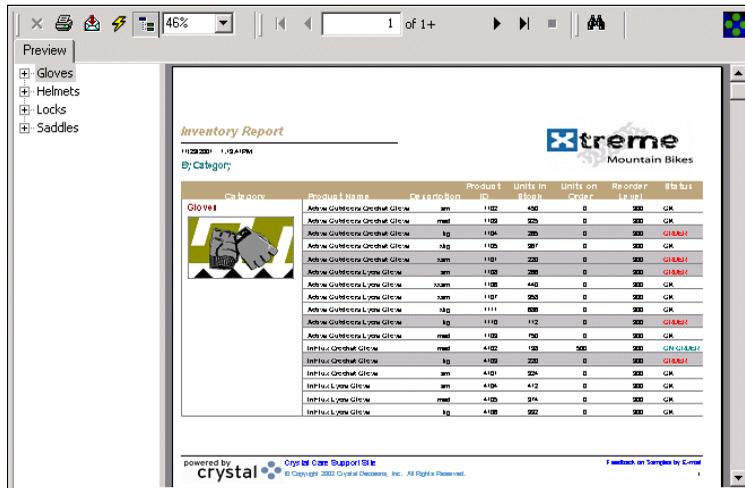
You can also view your reports when not connected to BusinessObjects Enterprise by using the ["Crystal Reports Offline Viewer" on page 66](#).

**Note:**

- Some features of the Crystal report viewers may be disabled by your BusinessObjects Enterprise administrator. Contact your administrator for more information.
- In addition to these default viewers, other custom viewers may be available. Contact your administrator for more information.

## ActiveX viewer

The ActiveX viewer is accessed using Microsoft Internet Explorer versions that support ActiveX controls. You can view your reports, refresh them, print them, and export them in a variety of formats.



In addition to the functions provided on the browser's standard toolbar, the ActiveX viewer has the following extra functions on its custom toolbar:

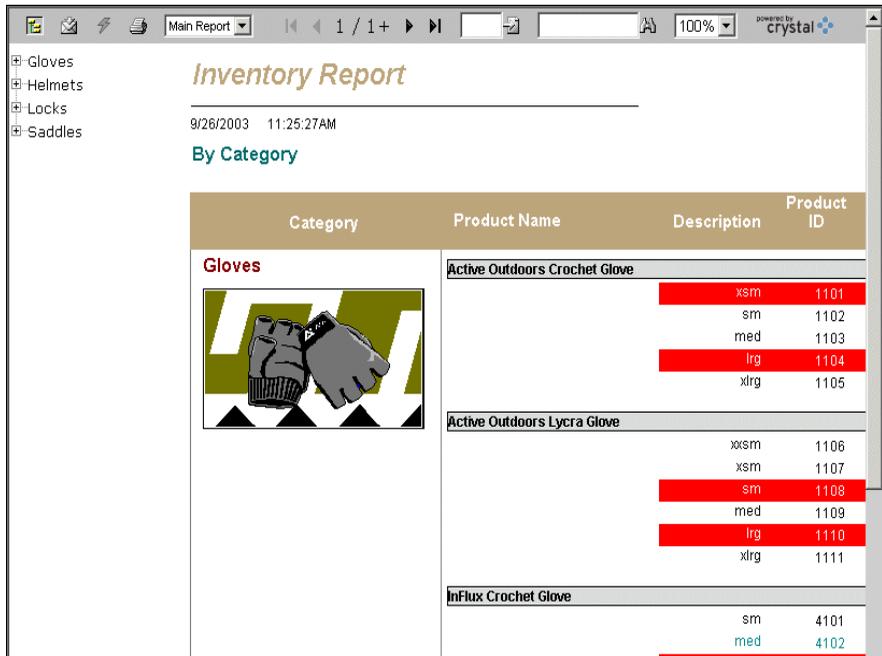
- Export report
- Print report
- Toggle group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Stop loading
- Refresh
- Search text
- Zoom
- Close current view

Place the mouse pointer over any of the buttons on the custom toolbar to see the associated tool tip.

**Note:** If a report is created using a different type of printer than the one available from your system, you may experience formatting problems when attempting to print a report displayed by the ActiveX viewer. The Report Viewer Print button uses printer settings saved with the report file. If you experience problems printing a report, contact your BusinessObjects Enterprise administrator.

## DHTML viewer

The DHTML viewer is accessed using a web browser that supports Dynamic HTML. You can view your reports, refresh them, and export them in a variety of formats.



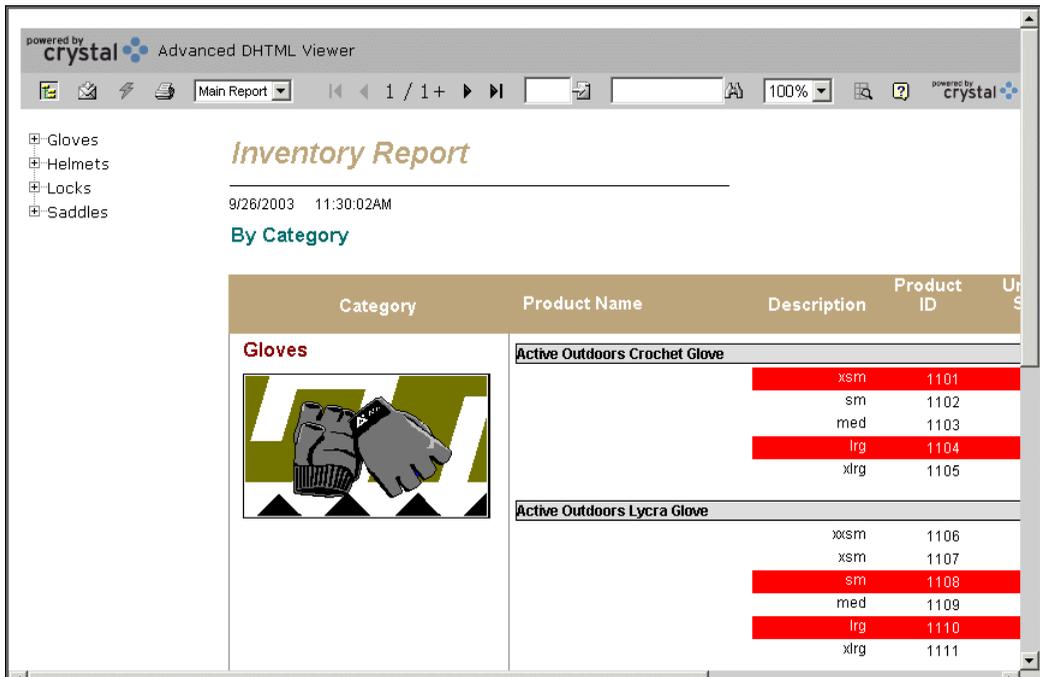
In addition to the functions provided on the browser's standard toolbar, the DHTML viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Go to first page
- Go to previous page
- Go to next page

- Go to last page
- Go to page
- Drilldown view name
- Refresh page
- Search for text
- Zoom

## Advanced DHTML viewer

The Advanced DHTML viewer is accessed using a web browser that supports Dynamic HTML. You can view your reports, refresh them, and export them in a variety of formats. In addition, the Advanced DHTML viewer provides an Advanced Search Wizard, which enables you to perform a search on your report data using Boolean operators.



The screenshot displays the Advanced DHTML Viewer interface. The browser title bar reads "powered by crystal Advanced DHTML Viewer". The toolbar includes a "Main Report" dropdown, navigation arrows, a page indicator "1 / 1+", a search box, a "100%" zoom dropdown, and a refresh icon. On the left, a tree view shows a hierarchy: "Gloves", "Helmets", "Locks", and "Saddles". The main content area features the report title "Inventory Report" in a gold font, followed by the date and time "9/26/2003 11:30:02AM" and the section title "By Category". Below this is a table with columns: "Category", "Product Name", "Description", "Product ID", and "Unit Price". The "Gloves" category is expanded, showing an image of two gloves and a list of products. The products are "Active Outdoors Crochet Glove" and "Active Outdoors Lycra Glove". The table rows for sizes are highlighted in red.

Category	Product Name	Description	Product ID	Unit Price
Gloves	Active Outdoors Crochet Glove	xsm	1101	
		sm	1102	
		med	1103	
		lrg	1104	
		xlrg	1105	
	Active Outdoors Lycra Glove	xism	1106	
		xsm	1107	
		sm	1108	
		med	1109	
		lrg	1110	
	xlrg	1111		

In addition to the functions provided on the browser's standard toolbar, the DHTML viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Drilldown view name
- Refresh page
- Search for text
- Show/Hide Advanced Search Wizard
- Zoom
- Help

**Note:**

- The Advanced DHTML viewer contains its own help file—click the Help button on the custom toolbar for detailed information on the viewer's extra functions, and on using the Advanced Search Wizard.
- In order to use the Advanced Search Wizard, you must have at least View On Demand rights or higher, as the search wizard access the report's data source.
- In some cases, you may not have the Advanced Search Wizard available in your viewer. This will depend on how your BusinessObjects Enterprise administrator has set up the report.

## Java viewer

The Java viewer is accessed using a web browser that supports the Java Virtual Machine. You can view your reports, refresh them, print them, and export them in a variety of formats.



In addition to the functions provided on the browser's standard toolbar, the Java viewer has the following extra functions on its custom toolbar:

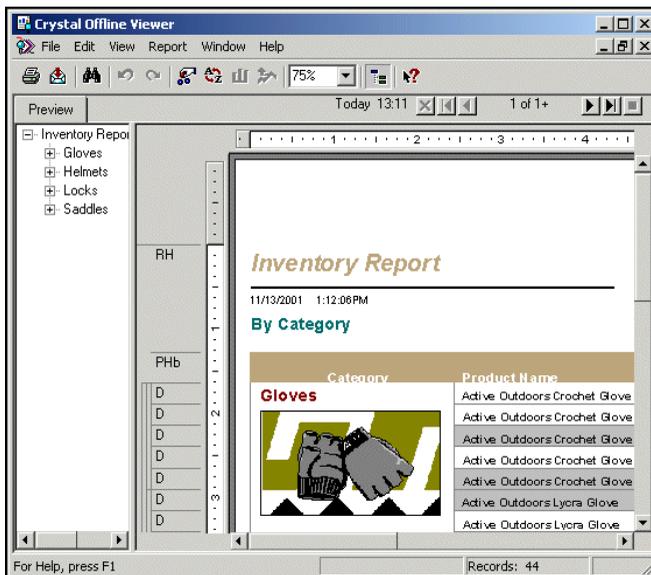
- Export report
- Print report
- Show/Hide group tree
- Stop
- Refresh data
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Current and last page numbers
- Search for text
- Magnification factor

When you place the mouse pointer over a button on the custom toolbar the associated description appears in the bottom left-hand side of the browser's status bar.

**Note:** You may experience minor problems scrolling through reports in the Java viewer. Such problems are a result of the Java Virtual Machine implemented in certain web browsers and cannot be accounted for by the Java viewer. If you experience problems, click repeatedly on the scroll buttons to scroll. Do not hold the scroll buttons down.

## Crystal Reports Offline Viewer

The Crystal Reports Offline Viewer is a report viewer installed locally on your computer. You can use this viewer to look at Crystal reports you've downloaded without being connected to BusinessObjects Enterprise.



Using the Crystal Reports Offline Viewer you can:

- Print or export your report
- Select the data you want to view
- Drill down for more detail in the report
- Sort the data in the report you want to view
- View multiple reports

The Crystal Reports Offline Viewer functions similarly to Crystal Reports. For information on the tasks you can perform with the Crystal Reports Offline Viewer (selecting records, sorting records, graphing, choosing Top N values, and so on), access the online help from the Crystal Offline Viewer Help menu.

## Installing the Crystal Reports Offline Viewer

Contact your administrator for a copy of the program that installs the Crystal Reports Offline Viewer. Once the viewer is installed, it resides locally as a client-side viewer.

### ► To install the Crystal Reports Offline Viewer

1. Run the Crystal Reports Offline Viewer installation program provided by your administrator.
2. Follow the instructions on your screen accepting the default values when possible.
3. When the installation is done, click **Finish**.

## Launching the Crystal Reports Offline Viewer

The Crystal Reports Offline Viewer is launched when you select a report (.rpt) from your machine and double-click it.

**Note:** If Crystal Reports is installed on your computer, it takes precedence over the Crystal Reports Offline Viewer and displays your reports by default.

# Viewing reports

Once you choose a report in BusinessObjects Enterprise, you can view it in its entirety. To view the report in a Crystal report viewer, either click the report title or click "View Latest Instance." See "[Viewing reports and Web Intelligence documents](#)" on page 56 for more information.

## Report viewing activities

Depending on which Crystal report viewer you are using, there are a number of activities you can carry out when reviewing a report. For more information on what activities are available in each browser, see "[The default Crystal report viewers](#)" on page 60.

### Refresh

Click Refresh to obtain the most up-to-date report data from the report's data source. You need to have the proper rights to run this report and the report must contain the necessary data source information before you can refresh the report.

## Find

Click Find to launch the Search dialog box. You can type the search criteria you want to find in the report.

## Show/Hide Group Tree

Click Show/Hide Group Tree to show or hide the report's group tree. When the group tree is displayed, you can use it to navigate through your report's data.

## Drill down

You can drill down on report data to show the data beneath charts and summarized groups. Single-click the chart or summarized data to see a drill-down view.

## Zoom

Select a magnification factor from the drop-down list to zoom in or out on a report.

## Scroll through pages

Use the scroll bars or the Go to Next Page/Go to Previous Page options to move through the pages of a report. Go to First Page and Go to Last Page options are also available.

## Set parameters

When you launch a report that contains data selection parameters, or when you refresh its data, you are prompted to select a value. The values and/or value ranges you can choose differ from report to report, depending on how the parameter was created in Crystal Reports.

# Distributing reports

Using the Crystal report viewers, you can distribute reports using one of two methods: printing or exporting.

**Tip:** If you have the rights to schedule reports, you can also distribute reports by scheduling directly to a disk location, email, FTP, or printer. For details, see [“Destination locations” on page 44](#).

## Printing reports

Successful instances of reports can be printed. Depending on which Crystal report viewer you use, the steps detailed below may be different; however, the general principles remain the same. (If there are on-screen instructions provided, follow those, rather than the steps below.)

1. On the viewer's toolbar, click **Print Report**.  
The Print dialog box appears.
2. In the Print range area, select all pages or a specific range of pages.
3. In the Copies area, select the number of copies for the report.
4. If you select the **Collate** check box, the report prints each page in order.  
For example, if you are printing two copies of a report with four pages, your report prints page one, two, three, and four of the first copy, and then prints the second copy.
5. Click **OK**.  
The Printing Records dialog box appears displaying the progress of your print job.

## Exporting reports

Successful instances of reports can be exported to several reporting formats, as well as to popular word processor and spreadsheet formats. This makes the distribution of information easier. For example, you may want to export data that predicts sales trends to an Excel spreadsheet before you email it to the sales team.

### Tip:

- You can select the page range for the report that you wish to export.
- For reports in which you can drill down, you can export the drill-down view.

## Format types

BusinessObjects Enterprise provides you with several export format types. They include:

- Crystal Reports
- Microsoft Excel
- Microsoft Excel (Data only)
- Microsoft Word

- Rich Text Format
- Adobe Acrobat

**Note:**

- When you export a report to a file format other than Crystal Reports format (.rpt), you may lose some or all of the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.
- The difference between Excel and Excel (Data only) is that Excel attempts to preserve the look and feel of your original report.
- The Crystal Reports Offline Viewer provides other formats for exporting. For more information about these formats, see the *Crystal Reports User's Guide*.



Publishing Objects to  
BusinessObjects Enterprise



7

chapter

## Publishing overview

*Publishing* is the process of adding objects such as reports to the BusinessObjects Enterprise environment and making them available to authorized users. There are several types of objects that you can publish to BusinessObjects Enterprise: reports (from Crystal Reports, OLAP Intelligence, and Web Intelligence), programs, Microsoft Excel files, Microsoft Word files, Microsoft PowerPoint files, Adobe Acrobat PDFs, rich text format files, text files, and hyperlinks, as well as object packages, which consist of report and/or program objects.

When you publish an object to BusinessObjects Enterprise, an entry is made in the Central Management Server (CMS) database. The Input File Repository Server stores the new object below the `\Enterprise\FileStore\Input\data\` directory. When a user schedules an instance of any object, BusinessObjects Enterprise queries the CMS for the location of the object file; the appropriate server component then retrieves and processes the object file from the Input File Repository. The processed instance is stored by the Output File Repository Server below the `\Enterprise\FileStore\Output\data\` directory.

**Note:** Only reports, programs, and object packages can be scheduled. Thus, only these three types of objects have instances.

You can publish objects to BusinessObjects Enterprise in three ways:

- Use the Publishing Wizard when you:
  - Have access to the locally installed application.
  - Are adding multiple objects or an entire directory.

For details, see [“Publishing with the Publishing Wizard” on page 74](#).

- Use the Central Management Console (CMC) when you are:
  - Publishing a single object.
  - Taking care of other administrative tasks.
  - Performing tasks remotely.

For details, see [“Publishing with the Central Management Console” on page 83](#).

- Save directly to your Enterprise folders when you are:
  - Designing reports with Crystal Reports.
  - Using the OLAP Intelligence Application Designer.
  - Creating other objects with BusinessObjects Enterprise plug-in components.

For details, see [“Saving objects directly to the CMS” on page 85](#).

**Note:** BusinessObjects Enterprise supports reports created in versions 6 through XI of Crystal Reports. Once published to BusinessObjects Enterprise, reports are saved, processed, and displayed in version XI format.

## Publishing options

During the publishing process, you specify how often an object is run. You can choose to set a schedule (recurring), or you can choose to let users set the schedule themselves (on demand).

For RPT report files, this affects when data is refreshed and what data users see. (You cannot schedule OLAP Intelligence reports (CAR files).)

Each publishing option has potential benefits and drawbacks:

- **Specifying the data that users see (recurring)**

This option is recommended for objects that are accessed by a large number of people and that do not require separate database logon credentials.

### Benefits

- Users view the same instance of the report, reducing the number of times the database is hit (and thus system resources are used more effectively).
- The report instance is static (contains saved data) and is stored on the Cache Server, allowing multiple users to access the report at the same time.

### Drawbacks

- The report instance the users see is based on the selection criteria (parameters and record selection formulas) and schedule set by the administrator.

- **Allowing users to update the data in the report (on demand)**

This option is recommended for smaller reports that use parameters and selection formulas, require separate database logon credentials, or have frequent data changes.

### Benefits

- Users are able to determine the frequency in which the data in the report is updated.

### Drawbacks

- Multiple users generating reports at the same time increases the load on the system and the number of times the database is hit.

- Each unique report page is cached separately. It's possible that the Cache Server can contain many copies of the cached report, each of them being generated by hitting the Page Server and database.

## Publishing with the Publishing Wizard

The Publishing Wizard is a locally installed, 32-bit Windows application. The wizard is made up of a series of screens. Only the screens applicable to the objects or folders you are publishing appear. For example, the settings for parameters and schedule format do not appear when you publish OLAP Intelligence applications. This section of the guide features a series of procedures to help you through the Publishing Wizard.

Once the object has been published, it will appear in the folder you specified in InfoView (or other web desktop) and in the Objects management area of the CMC.

**Note:** Depending on the rights assigned by your BusinessObjects Enterprise administrator, you may not be able to publish objects using the Publishing Wizard.

## Logging on to BusinessObjects Enterprise

1. From the **BusinessObjects Enterprise XI** program group, click **Publishing Wizard**.
2. Click **Next**.
3. In the **System** field, type the name of the CMS to which you want to add objects.
4. In the **User Name** and **Password** fields, type your BusinessObjects Enterprise credentials.
5. From the **Authentication** list, select the appropriate authentication type.
6. Click **Next**.

The Select Files dialog box appears.

## Adding objects

1. In the **Select Files** dialog box, depending on the type of object you are adding, click either **Add Files** or **Add Folders**.
2. Navigate to and select the object you want to add.

If you are adding a folder, you can choose to also add its subfolders by selecting the Include Subfolders check box.

**Tip:** Ensure the appropriate file type is listed in the Files of type field; by default this value is set to Report (\*.rpt).

3. Repeat steps 1 and 2 for each of the objects you want to add.
4. Click **Next**.

**Note:** If the **Specify Object Type** dialog box appears, choose a file type for each unrecognized object, then click **Next**.

The Specify Location dialog box appears.

## Creating and selecting a folder on the CMS

To add the selected objects, you must create or select a folder on the host CMS. Only the folders that you have full control access to will appear.

1. In the **Specify Location** dialog box, click the folder you want to add the objects to. Click **+** to the left of the folder to view the subfolders.



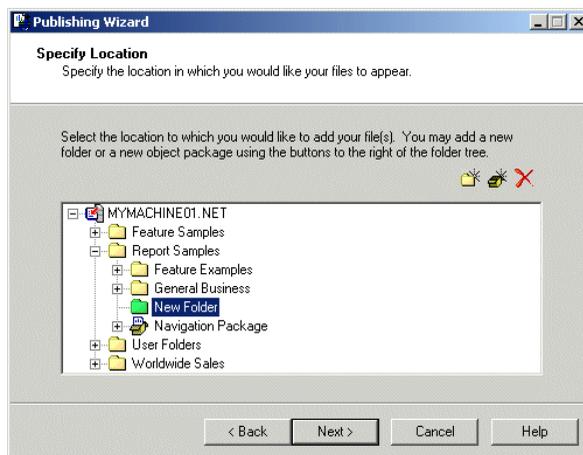
To add a new folder to the CMS, select a parent folder and then click the New Folder button. The new folder appears and can be renamed.



To add a new object package to the CMS, select a parent folder and then click the New Object Package button. The new object package appears and can be renamed.



To delete a folder or object package, select the item and click the Delete button.



**Note:** From the wizard, you can delete only new folders and object packages. (New folders are green; existing folders are yellow.)

If you are adding multiple objects and want to place them in separate directories, see “[Duplicating the folder structure](#)” on page 77.

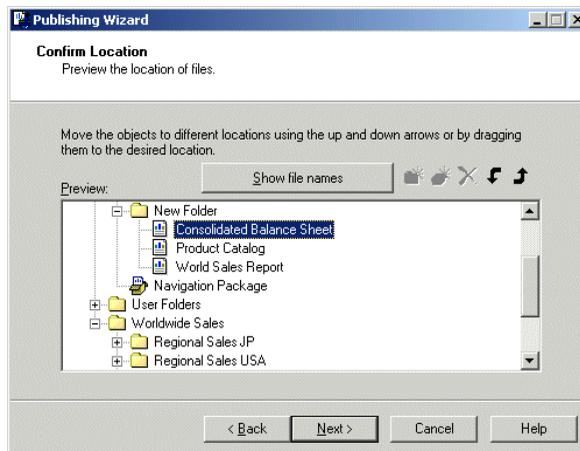
2. Click **Next**.

The Confirm Location dialog box appears.

## Moving objects between folders



1. In the **Confirm Location** dialog box, move objects to the desired folders by selecting each object and then clicking **Move Up** or **Move Down**.



You can also add folders and object packages by selecting a parent folder and clicking the New Folder or New Object Package button. To delete a folder or object packages, select it and click the Delete button. You can drag-and-drop objects to place them where you want. And you can right-click objects to rename them.

By default, objects are displayed using their titles. You can display the objects' local file names by clicking the “Show file names” button.

2. Click **Next** when you are finished.

The Specify Categories dialog box appears.

## Duplicating the folder structure

If you are adding multiple objects from a directory and its subdirectories, you are asked if you want to duplicate the existing folder hierarchy on the CMS.

1. In the **Specify Folder Hierarchy** dialog box, choose a folder hierarchy option.

To place all of the objects in a single folder, select **Put the files in the same location**.

To recreate all of the folders and subfolders on the CMS as they appear on your hard drive, select **Duplicate the folder hierarchy**. Choose the topmost folder that you want to include in the folder hierarchy.

2. Click **Next**.

The Confirm Location dialog box appears.

## Adding objects to a category

If you want to add the selected objects to a category, you can create or select a category on the host CMS.

1. In the **Specify Categories** dialog box, click the category you want to add the objects to. Click **+** to the left of the folder to view the subfolders.



To add a new category to the CMS, select a parent category and then click the New Category button. The new category appears and can be renamed.



2. In the File list, choose the object that you want to add to the category, then click the Insert File button.



To delete a category or to remove an object from a category, select the item and click the Delete button.

**Note:** From the wizard, you can delete only new categories. (New categories are green; existing categories are blue.)

3. Click **Next**.

The Specify Schedule dialog box appears.

## Changing scheduling options

The Specify Schedule dialog box allows you to schedule each report, program, and/or object package that you are publishing to run at specific intervals.

**Note:** This dialog box appears only for objects that can be scheduled.

1. In the **Specify Schedule** dialog box, select the object you want to schedule.
2. Select one of three intervals:
  - **Run once only**

Selecting the “Run once only” option provides two more sets of options:

    - **when finished this wizard**

This option runs the object once when you’ve finished publishing it. The object is not run again until you reschedule it.
    - **at the specified date and time**

This option runs the object once at a date and time you specify. The object is not run again until you reschedule it.
  - **Let users update the object**

This option does not schedule the object. Instead, it leaves the task of scheduling up to the user.
  - **Run on a recurring schedule**

Once you have selected this option, click the Set Recurrence button to set the scheduling options.

The “Pick a recurrence schedule” dialog box appears.

The options in this dialog box allow you to choose when and how often the object runs. Select the appropriate options and click the OK button.
3. Click **Next** after you have set the schedule for each object you are publishing.

## Refreshing repository fields

The BusinessObjects Enterprise Repository is a central location which stores shared elements such as text objects, bitmaps, custom functions, universes, and custom SQL commands. You can choose to refresh an object’s repository fields if the object references the repository. To complete this task, the Publishing Wizard needs to connect to your BusinessObjects Enterprise Repository database from the local machine. For details, see the *BusinessObjects Enterprise Administrator’s Guide*.

**Note:** The Specify Repository Refresh dialog box appears only when you publish report objects.

1. In the **Specify Repository Refresh** dialog box, select a report, and then select the **Use Object Repository when refreshing report** check box if you want to refresh it against the repository.

**Tip:** Click the Enable All button if you want to refresh all objects that reference the repository; click the Disable All button if you want to refresh none of the objects.

2. Click **Next** when you are finished.

## Selecting a program type

The Program Type dialog box appears only when you publish program objects. For details about program objects and program object types, see the *BusinessObjects Enterprise Administrator's Guide*.

1. In the **Program Type** dialog box, select a program.
2. Specify one of three program types:
  - **Binary/Batch**  
Binary/Batch programs are executables such as binary files, batch files, or shell scripts. They generally have file extensions such as: .com, .exe, .bat, .sh. You can publish any executable program that can be run from the command line on the machine where the Program Job Server is running.
  - **Java**  
You can publish any Java program to BusinessObjects Enterprise as a Java program object. They generally have a .jar file extension.
  - **Script**  
Script program objects are JScript and VBScript scripts.
3. Once you have specified the type of each program you are adding, click **Next**.

The Program Credentials dialog box appears.

## Specifying program credentials

1. In the **Program Credentials** dialog box, select a program.
2. In the **User Name** and **Password** fields, specify the user credentials for the account for the program to run as.  
The rights of the program are limited to those of the account that it runs as.
3. Once you have specified the user credentials for each program to run as, click **Next**.

The Change Default Values dialog box appears.

## Changing default values

You can publish objects without changing any of the default properties, or you can go through the remaining screens and make changes.

**Note:** If you use the default values, your object may not schedule properly if the database logon information is not correct, or if the parameter values are invalid.

► **To publish objects without making modifications**

1. Select **Publish without modifying properties**.
2. Click **Next** through the wizard's remaining dialog boxes.

► **To review or modify objects before publishing**

1. Select **Review or modify properties**.
2. Click **Next**.

The Review Object Properties dialog box appears.

## Changing object properties

1. In the **Review Object Properties** dialog box, select the object you want to modify.
2. Enter a new title or description.
3. Select the **Generate thumbnail image** check box if you want users to see a thumbnail of a report object before they open it.

**Tip:** The “Generate thumbnail image” check box is available only if the object is an RPT file and was saved appropriately. To display thumbnails for a report, open the report in Crystal Reports and click Summary Info on the File menu. Select the “Save preview picture” check box and click OK. Preview the first page of the report and save your changes.

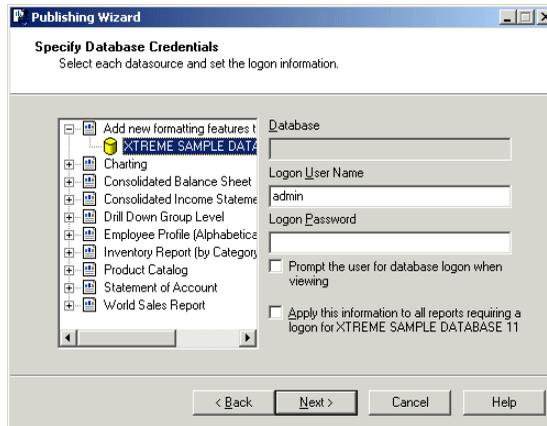
4. Click **Next**.

The Specify Database Credentials dialog box appears if it is needed.

## Entering database logon information

Some objects use data sources that require logon information. If objects you are adding are of this type, follow these steps.

1. In the **Specify Database Credentials** dialog box, double-click the object, or click + to the left of the object to expose the database.



2. Select the database and change the logon information in the appropriate fields.

If the database does not require a user name or password, leave the fields blank.

**Note:** Enter user name and password information carefully. If it is entered incorrectly, the object cannot retrieve data from the database.

3. Once you have completed the logon information for each object using a different database, click **Next**.

The Set Report Parameters dialog box appears if it is needed.

## Setting parameters

Some objects contain parameters for data selection. Before such an object can be scheduled, you must set the parameters in order to determine the default prompts.

1. In the **Set Report Parameters** dialog box, select the object whose prompts you want to change.

The object's prompts and default values appear in a list on the right-hand side of the screen.

2. Click **Edit Prompt** to change the value of a prompt.

Depending on the type of parameter you have chosen, different dialog boxes appear.

3. If you want to set the prompts to contain a null value (where possible), then click **Set Prompts to NULL**.

4. Click **Next** after you have finished editing the prompts for each object.

The Specify Format dialog box appears.

## Setting the schedule output format

You can choose an output format for each scheduled report that you publish. For some of the formats, you can customize the schedule format options.

1. In the **Specify Format** dialog box, select the object whose schedule format you want to change.
2. Select a format from the list (Crystal Report, Microsoft Excel, Microsoft Word, Adobe Acrobat, and so on).

Where applicable, customize the schedule format options. For example, if you select Paginated Text, enter the number of lines per page.

3. Click **Next**.

## Adding extra files for programs

Some programs require access to other files in order to run.

1. Select a program.
2. Click **Add** to navigate to and select the necessary file.
3. Once you have added all necessary extra files for each program, click **Next**.

The Command line for Program dialog box appears.

## Specifying command line arguments

For each program, you can specify any command-line arguments supported by your program's command-line interface. They are passed directly to the command-line interface, without parsing.

1. Select a program.
2. In the **Command line** area, type the command-line arguments for your program, using the same format you would use at the command line itself.
3. Once you have specified all necessary command-line arguments for each program, click **Next**.

## Finalizing the objects to be added

After you have provided all of required information for the objects, the Publishing Wizard displays a final list of the objects that it is going to publish.

1. After ensuring all the objects you want to publish have been added to the list, click **Next**.  
 The objects are added to the CMS, scheduled, and run as specified. When the processing is done, you are returned to the final screen of the Publishing Wizard.
2. To view the details for an object, select it from the list.
3. Click **Finish** to close the wizard.

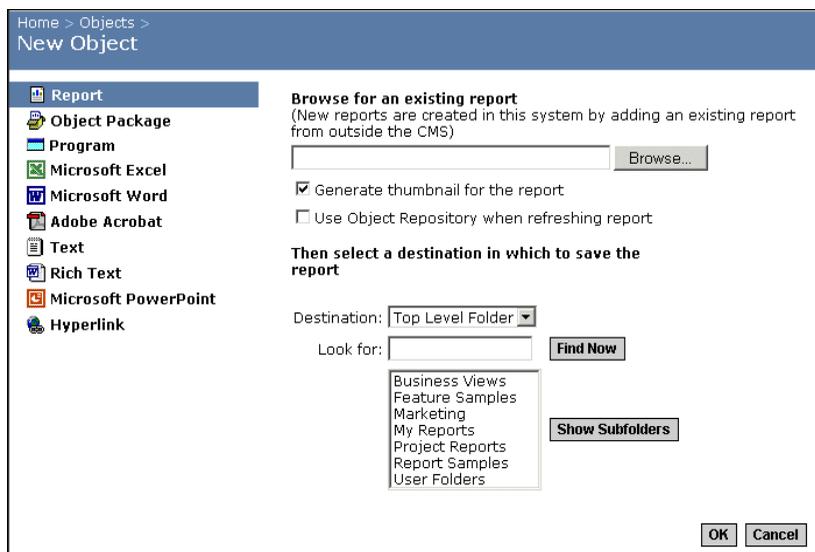
## Publishing with the Central Management Console

If you have administrative rights to BusinessObjects Enterprise, you can publish objects over the Web from within the CMC.

► **To add an object with the CMC**

1. Go to the **Objects** management area of the CMC.
2. Click **New Object**.

The New Object page appears, with the Report properties displayed.



3. On the left side of the page, click the type of object you want to add.
4. Enter the object's properties.

The properties that appear vary according to the type of object you are adding:

Property	Object Types	Description
File name	Report, Program, Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Adobe Acrobat, Text, Rich Text	Type the full path to the object, or click Browse to perform a search.
Title	Object Package, Hyperlink	Type the name of the object.
Description	Object Package, Hyperlink	Type a description of the object.
Generate thumbnail for the report	Report	If you do not want the user to see a thumbnail preview of the report in BusinessObjects Enterprise, clear the “Generate thumbnail for the report” check box.  <b>Tip:</b> To display thumbnails for a report, open the report in Crystal Reports and click Summary Info on the File menu. Select the “Save preview picture” check box and click OK. Preview the first page of the report and save your changes.
Use Object Repository when refreshing report	Report	Select this option to automatically refresh an object’s repository fields against the repository each time the report runs.
Program Type	Program	Select Executable, Java, or Script.  <b>Tip:</b> <ul style="list-style-type: none"> <li>• Run Java programs as Java program objects.</li> <li>• Run JScript and VBScript programs as Script program objects.</li> <li>• Run all other programs as Executable program objects.</li> </ul>
URL	Hyperlink	Type the URL address of the page you want the hyperlink object to link to.

5. If you want to place the object in a category, select the category from the list.
6. Ensure that the correct folder or object package name appears in the **Destination** field.

**Tip:**

- To expand a folder, select it and click Show Subfolders.
- To search for a specific folder or object package, use the Look For field.

**Note:** Only report and program objects can be published to object packages.

7. Click **OK**.

When the object has been added to the system, the CMC displays the Properties screen. If necessary, you can now modify the object's properties, such as its title and description, the database logon information, scheduling information, user rights, and so on.

## Saving objects directly to the CMS

If you have installed one of the Business Objects designer components, such as Crystal Reports or OLAP Intelligence, you can use the Save As command to add objects to BusinessObjects Enterprise from within the designer itself.

For instance, after designing a report in OLAP Intelligence, click Save As on the File menu. In the Save As dialog box, click Enterprise Folders; then, when prompted, log on to the Central Management Server (CMS). Specify the folder where you want to save the report and click Save.

## 7 | Publishing Objects to BusinessObjects Enterprise *Saving objects directly to the CMS*



Business Objects  
Information Resources



8



chapter

## Documentation and information services

Business Objects offers a full documentation set covering its products and their deployment. Additional support and services are also available to help maximize the return on your business intelligence investment. The following sections detail where to get Business Objects documentation and how to use the resources at Business Objects to meet your needs for technical support, education, and consulting.

### Documentation

You can find answers to your questions on how to install, configure, deploy, and use Business Objects products from the documentation.

### What's in the documentation set?

View or download the *Business Objects Documentation Roadmap*, available with the product documentation at <http://www.businessobjects.com/support/>.

The Documentation Roadmap references all Business Objects guides and lets you see at a glance what information is available, from where, and in what format.

### Where is the documentation?

You can access electronic documentation at any time from the product interface, the web, or from your product CD.

#### Documentation from the products

Online help and guides in Adobe PDF format are available from the product Help menus. Where only online help is provided, the online help file contains the entire contents of the PDF version of the guide.

#### Documentation on the web

The full electronic documentation set is available to customers on the web from support web site at: <http://www.businessobjects.com/support/>.

#### Documentation on the product CD

Look in the docs directory of your product CD for versions of guides in Adobe PDF format.

## Send us your feedback

Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful? Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation: [documentation@businessobjects.com](mailto:documentation@businessobjects.com).

**Note:** If your issue concerns a Business Objects product and not the documentation, please contact our Customer Support experts. For information about Customer Support visit: <http://www.businessobjects.com/support/>.

## Customer support, consulting and training

A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business.

### How can we support you?

Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate customer support centers in the following countries:

- USA
- Australia
- Canada
- United Kingdom
- Japan

### Online Customer Support

The Business Objects Customer Support web site contains information about Customer Support programs and services. It also has links to a wide range of technical information including knowledgebase articles, downloads, and support forums.

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

## Looking for the best deployment solution for your company?

Business Objects consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in relational and multidimensional databases, in connectivities, database design tools, customized embedding technology, and more.

For more information, contact your local sales office, or contact us at:

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

## Looking for training options?

From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style. Find more information on the Business Objects Education web site:

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

## Useful addresses at a glance

Address	Content
<b>Business Objects product information</b> <a href="http://www.businessobjects.com">http://www.businessobjects.com</a>	Information about the full range of Business Objects products.
<b>Product documentation</b> <a href="http://www.businessobjects.com/support">http://www.businessobjects.com/support</a>	Business Objects product documentation, including the Business Objects Documentation Roadmap.
<b>Business Objects Documentation mailbox</b> <a href="mailto:documentation@businessobjects.com">documentation@businessobjects.com</a>	Send us feedback or questions about documentation.
<b>Online Customer Support</b> <a href="http://www.businessobjects.com/support/">http://www.businessobjects.com/support/</a>	Information on Customer Support programs, as well as links to technical articles, downloads, and online forums.
<b>Business Objects Consulting Services</b> <a href="http://www.businessobjects.com/services/consulting/">http://www.businessobjects.com/services/consulting/</a>	Information on how Business Objects can help maximize your business intelligence investment.
<b>Business Objects Education Services</b> <a href="http://www.businessobjects.com/services/training">http://www.businessobjects.com/services/training</a>	Information on Business Objects training options and modules.



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