



BusinessObjects Enterprise XI R2 Portal Integration Kit Administrator's Guide for BusinessObjects Portlets

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Welcome to the
BusinessObjects Enterprise
XI R2 Portal Integration Kit



1

chapter



About this guide

This guide details configuration and troubleshooting information for the BusinessObjects Enterprise XI Release 2 (R2) Portal Integration Kit.

Who should read this guide

This guide is intended for the following audiences:

- administrators who want to know how to configure BusinessObjects Enterprise to work with the BusinessObjects Enterprise XI R2 Portal Integration Kit
- portlet developers who want to know how to create customized portlets

Familiarity with your portal server is essential, as is a good working knowledge of both Crystal Reports and BusinessObjects Enterprise.

For more information about the BusinessObjects Enterprise XI R2 Portal Integration Kit, consult the *BusinessObjects Enterprise XI R2 Portal Integration Kit Installation Guide* and the *BusinessObjects Enterprise XI R2 Portal Integration Kit User's Guide*, which are included in PDF format in your product distribution.

For more information about BusinessObjects Enterprise, consult the *BusinessObjects Enterprise Administrator's Guide*, which is included with BusinessObjects Enterprise. For more information about Crystal Reports, consult the *Crystal Reports User's Guide*, which is included with Crystal Reports.

Business Objects information resources

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



Configuring Your Deployment



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chapter



Overview

There are many possible configurations for your Portal Server deployment. This chapter provides detailed information about configuring BusinessObjects Enterprise and on scheduling and setting report properties to maximize their effectiveness for Information Consumers. This chapter requires that you have experience in using and administering BusinessObjects Enterprise. For more information on BusinessObjects Enterprise, refer to the *BusinessObjects Enterprise Administrator's Guide*, which is found in your BusinessObjects Enterprise product distribution.

Configuring BusinessObjects Enterprise for your Portal Server deployment

When you first install the BusinessObjects Enterprise XI R2 Portal Integration Kit, you may need to configure or update certain settings within BusinessObjects Enterprise to optimize your deployment.

Note: After you install the BusinessObjects Enterprise XI R2 Portal Integration Kit, no icons or shortcuts are added to your Start menu.

Related topics:

- For information about security settings, see [“Security and Single Sign On”](#) on page 8
- For information about specifying User and Group rights, see [“User and group rights”](#) on page 10

Security and Single Sign On

The BusinessObjects Enterprise XI R2 Portal Integration Kit supports Siteminder Automatic Sign On for your BusinessObjects Enterprise deployment. Automatic Sign On is enabled when the value is set to true in the web.xml file.

After installing the BusinessObjects Enterprise XI R2 Portal Integration Kit, you need to ensure that your BusinessObjects Enterprise security settings are set correctly. Otherwise, your users may see the following error message when they attempt to access the portal:

“Unable to access the BusinessObjects Enterprise infrastructure at *servername* to *username*. The infrastructure may not be accessible, or you have not been granted access using automatic sign-on with *authenticationmode*. Contact your reporting administrator for further details on availability.”

Single Sign On with Enterprise

To use Enterprise authentication, ensure the following information is set:

- BusinessObjects Automatic SignOn is set to `true`
- BusinessObjects Authentication Mode is set to `secEnterprise`
- BusinessObjects Enterprise Static Username is set to the Single SignOn account's user name
- BusinessObjects Enterprise Static Password is set to the Single SignOn account's password

Note:

- If you are using Enterprise authentication to sign on automatically, the BusinessObjects Enterprise XI R2 Portal Integration Kit will attempt to log on with the portal user's name and a blank password. Please ensure that your CMC authentication is setup to handle this situation.
- Windows Active Directory(`secWinAD`) and Windows NT(`secWinNT`) authentication are not supported for the BusinessObjects portlets.

Single Sign On with SiteMinder

To use LDAP authentication, ensure the following information is set:

- Automatic Sign On is set to `true`
- BusinessObjects Authentication Mode is set to `secLDAP`
- Your LDAP deployment is set up properly
- Your portal user names match the aliases in your authentication system.

Note: If you are using LDAP authentication to sign on automatically, the BusinessObjects Enterprise XI R2 Portal Integration Kit will attempt to use the SiteMinder token to log on. Please ensure that your CMC authentication is setup to handle this situation.

For more information, see the "BusinessObjects Enterprise Security Concepts" section in the *BusinessObjects Enterprise Administrator's Guide*.

Single Sign On with Java Authentication and Authorization Service (JAAS)

To use JAAS Single Sign On, you must replace the default `sso.jar` file that is included in the `BusinessObjectsPortlet.war` file with an `sso.jar` file for your platform. The `sso.jar` files and the instructions on how to configure them are available from the download center (<http://www.businessobjects.com/products/downloadcenter/boepik.asp>).

User and group rights

If users do not have View On Demand rights to reports that do not have instances in the BusinessObjects Enterprise system, they will see an “Unavailable” status (and no hyperlinks) in the Availability column of the listing portlet.

Users need View rights to see reports in the list; they need View On Demand rights to access reports in real-time (versus reports that have been scheduled and run beforehand).

To ensure that all users have View rights, in the BusinessObjects Enterprise Central Management Console, add your users to the Everyone group and then give this group View rights to specific folders that contain reports that are accessed by the Portal Server. For more information about setting user rights, see the “Controlling User Access” section in the *BusinessObjects Enterprise Administrator’s Guide*.

Additional configuration settings

This section provides information about optional BusinessObjects Enterprise settings that you can configure for your Portal Server deployment.

Specifying a server for viewing reports

By default, the reports that Information Consumers view are processed by the the BusinessObjects Enterprise Page Server. If the page server is not available, the Report Application Server (RAS) will be used.

If you want to configure the system to use the RAS to process reports, create a new Server Group for your RAS in BusinessObjects Enterprise. Then, specify this server group in all of the reports. (Alternatively, you can stop the Page Server.)

For more information about server groups, see “Managing Server Groups” in the *BusinessObjects Enterprise Administrator’s Guide*.

► **To specify the server that a report object uses**

1. In the **Objects** management area of the Central Management Console (CMC), select an object by clicking its link.
2. Click the **Process** tab.

3. In the Default Servers To Use For Viewing area, choose one of the three options:
 - **Use the first available server**

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

This option will attempt to process the object from the servers that are found within the server group that you select from the list. 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 use only the specified servers that are found within the server group that you select. If all of the servers in the server group are unavailable, then the object will not be processed.
4. Click **Update**.

Using parameters

Parameter prompts work with the BusinessObjects Enterprise XI R2 Portal Integration Kit only when you view reports in real-time (unless the parameter is a stored procedure). In the Central Management Console, you must ensure that the “Prompt the user for new value(s) when viewing” check box is selected; otherwise, the values of the prompts in the report cannot be changed by the Information Consumer. (The prompts will be disabled if they are displayed in a list portlet.)

Tip:

- If your report contains parameters, users who view the report require View On Demand (or greater) rights.
- To allow Information Consumers to modify parameter values, the reports that they view must be real-time reports. However, real-time reports can be resource-intensive; therefore, to reduce the processing load on your BusinessObjects Enterprise services, you should use scheduled reports whenever possible.
- If you have one report that has two uses (for example, real-time filtering and general viewing by date), separate the usage by having two copies of the report. For real-time filtering, allow users to view the report on demand (which is resource intensive); for general viewing by date,

schedule the report to run as often as required. By separating the usage, this method results in less impact on your system resources, because only the real-time filtering report needs to be viewed on demand.

► **To specify parameter settings**

1. In the **Objects** management area of the CMC, select a report object by clicking its link.
2. Click the **Process** tab, and then click the **Parameters** link.
3. Under the **Value** column, select the value that is associated with the parameter that you want to change.
4. Select the **Prompt the user for a new value(s) when viewing** check box to ensure that your users are prompted when they view the report instance through their web part.
5. Click **Submit**.

Scheduling and scaling recommendations

Because BusinessObjects Enterprise schedules, processes, and runs reports, general scheduling and scaling recommendations that apply to BusinessObjects Enterprise also apply to the BusinessObjects Enterprise XI R2 Portal Integration Kit. Use the Central Management Console (CMC) to specify the different scheduling properties for your reports. For more scheduling recommendations, see the “Scaling Your System” section in the *BusinessObjects Enterprise Administrator’s Guide*.

Tip:

- When you have reports that need to be updated regularly, schedule reports to run as required if the users are going to access the same set of data.
- When you need to view a report, schedule and run the report instead of viewing it on demand. Scheduled reports are less resource-intensive.
- When assigning View On Demand rights, note that every time a user (with the proper rights) refreshes a report, the report accesses the data source. In addition, the Page Server or the Report Application Server processes the request.

Exporting reports

For performance reasons, set export options (Microsoft Excel, Adobe Acrobat, and so on) at schedule time when possible. When users export a report dynamically by selecting the alternative format viewing options on the toolbar, this request is more process and resource intensive.

Data source information

Set your database logon information for your reports through the CMC; otherwise, users will need to log on to the database every time they refresh or view a report.

Availability column

In your portal, note that the Availability column in a portlet is not driven by the status of a scheduled instance (for example, a recurring instance). The Availability information comes from the default value that is specified in the CMC for the report object.

To ensure that the Availability column displays the most appropriate information for the report, do the following: in the Central Management Console, select the schedule option for the report and then click the Update button.

Report rights

If your report contains parameters, users who view the report require View On Demand (or greater) rights.

Miscellaneous settings and considerations

This section provides information on identifying report instances and on creating Crystal reports.

Determining specific IDs for locations

Your Web Site Creators may want to access a location directly through the location's unique identifier, or CUID. For example, when a Web Site Creator wants to guarantee that he or she is accessing a specific folder or category, the CUID provides the necessary information.

▶ **To determine CUIDs for a location**

1. In the **BusinessObjects Enterprise Admin Launchpad**, under the “Client Samples” area, select **Query Builder**.

2. Specify the **User Name**, **Password**, and **Authentication**.

Note: Ensure that you log on as an user with administrator rights in BusinessObjects Enterprise.

3. Enter your SQL statement.

- You can enter the following SQL statement to find all the CUIDs that are related to General Business:

```
select si_ID, si_CUID, si_name from CI_INFOOBJECTS  
       where SI_name = 'General Business'
```

For other locations, replace 'General Business' with the relevant location name.

- If you want to see all CUIDs on the system, type

```
select si_ID, si_CUID, si_name from CI_INFOOBJECTS
```

4. Click **Submit**.



Building Customized Portlets ◀



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chapter

Communication interfaces

This chapter provides information on communication interfaces for portlet developers. Using this chapter as a reference guide, you can create portlets that communicate with portlets from the BusinessObjects Enterprise XI R2 Portal Integration Kit.

Communication between portlets

The BusinessObjects portlets must be installed from the same WAR file because interportlet communication between WAR files is not supported.

Communication between portlets is provided by a combination of a communication type value and a communication keyword.

Communication type

The Document List portlet has a Communication Type field. This field contains a comma separated list of the types of objects that can be displayed. If a value is listed in the Communication Type field, the object can be displayed in the Document View portlet. If a value is not listed in the Communication Type field, a separate viewer window opens to display the object.

The following table lists the supported object types and the values to use in the Communication Types field.

Object Type	Communication Type value
Analysis (OLAP)	Analysis
Analytic (EPM)	Analytic
Crystal Report	CrystalReport
DesktopIntelligence	FullClient
Excel	Excel
MyInfoview Dashboard	MyInfoview
PDF	PDF
Powerpoint	Powerpoint
RTF	RTF
Txt	Txt
Webi	Webi

Communication keyword

A communication keyword provides the connection between the Document List portlet and the Document View portlet. When this keyword is set, the Document View portlet can display the objects that are listed in the Document List portlet.

Note: You must have the same value in both Communication Keyword fields for the objects to be displayed in the Document View portlet.

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Building Customized Portlets Communication between portlets



Business Objects
Information Resources



appendix

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.

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

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