



BusinessObjects BI Widgets XI 3.1 User Guide

BusinessObjects Enterprise XI 3.1

windows 

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Introduction

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chapter

BI Widgets delivers on the vision of personalized, ambient Business Intelligence by allowing you access to lightweight, secure, and personalized desktop widgets at all times.

BI Widgets allow you to customize and re-mix BI content into your own personalized desktop BI view. You can easily access BI content, create personal dashboards on your desktop, and integrate BI content into other Windows applications, simply by using drag and drop operations.

BI Widgets benefits

BI Widgets is an application that delivers information to your desktop via widgets. The widget framework provides the following functionality:

- Search, Organize, and View commonly used metrics in a single secure view.
- Quickly create desktop widgets from Webi report parts and Xcelsius files.
- Access data internally (Intranet) or externally (Extranet), and aggregate that information into a single personalized view.
- Subscribe to and receive RSS feeds.
- Create custom organization of BI content.

Using BI Widgets, you can display dynamically updated BI report information in a small space and with less effort than accessing BI information through your browser.



Getting to Know BI Widgets



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chapter



BI Widgets provides access to your Business Intelligence content as desktop widgets. The BI Widgets framework integrates XI R3 enterprise search and repository exploration with native windows viewers for Web Intelligence and Xcelsius documents.

BI Widgets makes it easy to find your BI content and quickly create widgets to display your data.

How BI Widgets works

BI Widgets connects content on Business Objects XI R3 and displays it as dynamically updating data using desktop widgets. Using widgets, you can have BI content easily available, while using only a small portion of your desktop screen.

BI Widgets easily navigates to reports, which can easily be converted to widgets using drag and drop operations.

These widgets display your report content in a small desktop display. As the information in your source files changes, BI Widgets automatically updates the widget on your desktop, providing you with up-to-the-minute data at your fingertips.

BI Widgets Features

BI Widgets includes the following features:

- Instant information access through desktop widgets from Xcelsius files and Webi Report Parts
- Drag & drop of Web Intelligence Report Parts into desktop applications
- A Microsoft Vista look and feel including window transparency and shadowing
- Automated single sign on across multiple XI R2 repositories
- Easy search for content across multiple BI repositories, with aggregate information from multiple repositories displayed a single personalized view
- RSS Inbox with popup notification
- Supports Windows Vista Sidebar gadgets
- Saving widgets to share and distribute

- Managing user rights and permissions in the Business Objects Enterprise Configuration Management Console



Installing BI Widgets



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This section outlines the steps needed to install and activate your copy of BI Widgets.

Prerequisites

You must have the following software to use BI Widgets:

- Windows XP Service Pack 2, Windows 2003, or Windows Vista
- Microsoft .NET Framework 2.0 or later
- Flash Player 9 or later

To access BI Content, you must be connected to a Business Objects XI R3 repository. See your network administrator or refer to the BusinessObjects Enterprise Administrator Guide if you need more information.

Running a silent installation

For a silent installation, system administrators run a script from the command line to automatically install BI Widgets components on any machine in their system, without the installation program prompting them for information. The silent installation is not available from the BI Widgets Setup program and is intended only for experienced system administrators.

A silent installation is particularly useful when system administrators need to perform multiple installations and do not want to interrupt people who are working on machines in their system. System administrators can also use the silent installation command in their own installation scripts. For example, if an organization uses scripts to install software on machines, system administrators can add the silent installation command to their scripts.

A silent installation of BI Widgets consists of the command `setup.exe`, followed by several parameters that provide information about the installation.

The example below installs the English version of BI Widgets to the Business Objects directory with Enterprise authentication set as default:

```
Setup.exe /qn CLIENTLANGUAGE=en
```

```
INSTALLDIR="c:\business objects" CMSAUTHENTICATION="SAP"
```

```
WEBURL="http://machinename:8080 /dswsbobje/services/session"
```

```
BOESERVERNAME = "BusinessObjects Enterprise server name"
```

The following table describes the most common parameters:

Installation parameter	Description
/qn	Performs the installation silently, without prompting the user.
INSTALL DIR = filepath	Specifies the machine and target directory where you want to install Live Office. Replace <filepath> with the full path for the installation directory.
BOESERVER-NAME	Specifies the name of the BOE server accessed by Live Office.
WEBURL	Specifies the URL of the web service. This is an optional parameter.
CMS AUTHENTICATION	Specifies the authentication type. The following options are available: <ul style="list-style-type: none">• Enterprise• SAP• LDAP• WindowAD This is an optional parameter and Enterprise is the default setting.

Connecting to a repository


To use your BI report content with BI Widgets, you must connect to a repository.

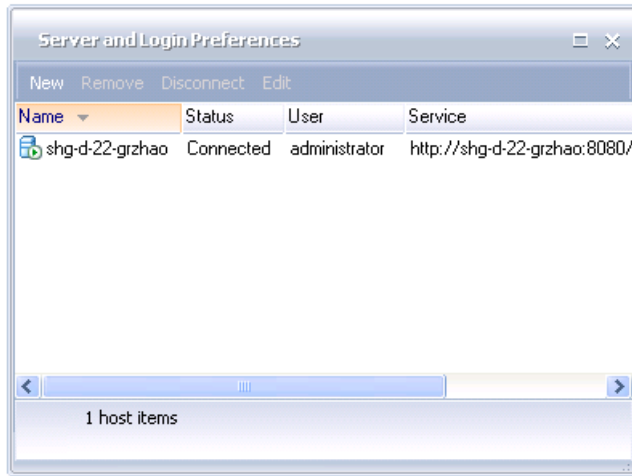
After BI Widgets is installed, the Credentials dialog appears:

1. Type the server name in the **Host Name** field.
 The Host URL is generated automatically by BI Widgets as you type the Host Name.
2. Type your **User** name and **Password** in the appropriate fields.
3. Check **Sign me in automatically** to automatically connect to the server when you open BI Widgets.
4. Click **OK**.

Connecting to additional repositories

BI Widgets can connect to more than one repository, which enables you to access all of your BI content. To configure multiple connections:

1. Right-click the BI Widget icon  and select Server and Login Preferences.
2. The Server and Login Preferences screen appears.



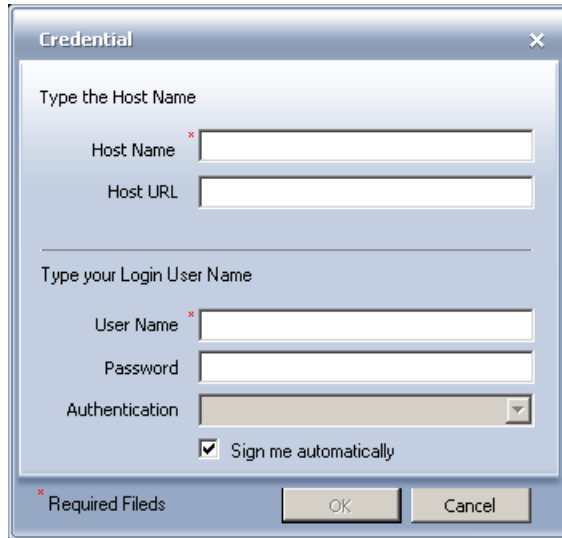
3. The Server and Login Preferences screen displays the server list and connection state of each.

The dialog offers the following options:

- Add a new connection
- Remove a connection
- Connect/Disconnect
- Edit connections

Adding a connection

To add a new connection, select **New** from the menu. Follow the steps outlined in [Connecting to a repository](#) on page 14 to enter the information for the new repository.

A screenshot of a 'Credential' dialog box. The dialog has a title bar with a close button. It is divided into two sections. The first section is titled 'Type the Host Name' and contains two text input fields: 'Host Name' (with a red asterisk) and 'Host URL'. The second section is titled 'Type your Login User Name' and contains three fields: 'User Name' (with a red asterisk), 'Password', and 'Authentication' (a dropdown menu). Below these fields is a checked checkbox labeled 'Sign me automatically'. At the bottom left, there is a red asterisk and the text '* Required Fields'. At the bottom right, there are 'OK' and 'Cancel' buttons.

The new repository will be displayed in the Server and Login Preferences dialog.

To remove a connection

To remove a connection, highlight the server name in the list and select **Remove**, or right-click the server name and select **Remove** from the context menu. The Remove Host dialog appears.

Select **Yes** to continue, or **No** to cancel.

To connect/disconnect a server

- To connect to a server, highlight the server name and select **Connect**, or right-click the server name and select **Connect** from the context menu.
- To disconnect a server, highlight the server name and select **Disconnect**, or right-click the server name and select **Disconnect** from the context menu.

To edit a connection

To edit a connection, highlight the server name and select **Edit**, or right-click the server name and select **Edit** from the context menu.

Edit the configuration as needed.

3 | Installing BI Widgets

Connecting to a repository

Note:

You cannot change the name of a connection.



Using BI Widgets to Access
BI Content



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chapter

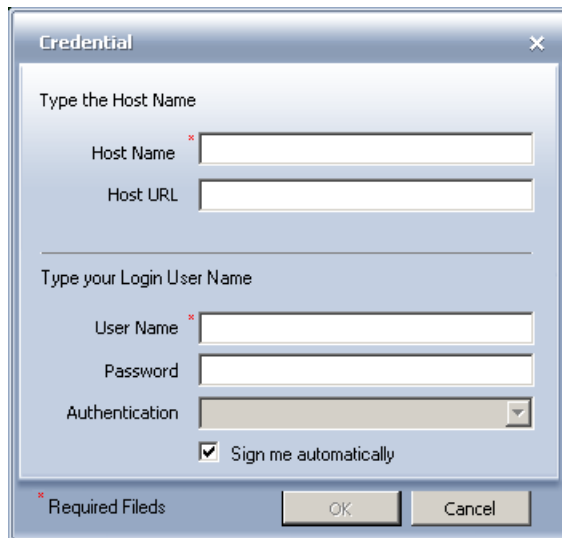


In order to use or create widgets with BI Content, you must connect to one or more servers that contain BI Content.

Login to BI Widgets

To take advantage of the full functionality of BI Widgets, it must be connected to a Business Objects XI R3 server.

To login to a server, right click the BI Widget icon  and select **Login**. The Credentials dialog appears.



If you have not already done so, configure a server using the steps provided in [Connecting to a repository](#) on page 14 .

If a repository has already been configured, you will only need to enter your XI R3 **User** name and **Password**

Check **Sign me automatically** to automatically log in to the repository when BI Widgets is opened.

If the host has been defined via a configuration file, the authentication dialog will only require the User name and Password.


Locating content BI Content on one or more XI R3 servers

BI Widgets has built-in searching and exploring functions that help you quickly find your BI reports.

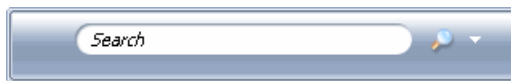
Searching for content

You can use BI Widgets to search BI content across all connected XI R3 repositories. Searches are saved, so you can refine search criteria and compare search results.

To perform a search:

1. Right-click the BI Widgets icon  in the taskbar and select **Content Search**.

The Search window appears.



Tip:

To narrow your search to a specific server, select the server name from the drop-down menu in the Search window.



2. Type your search term and click the Search icon.

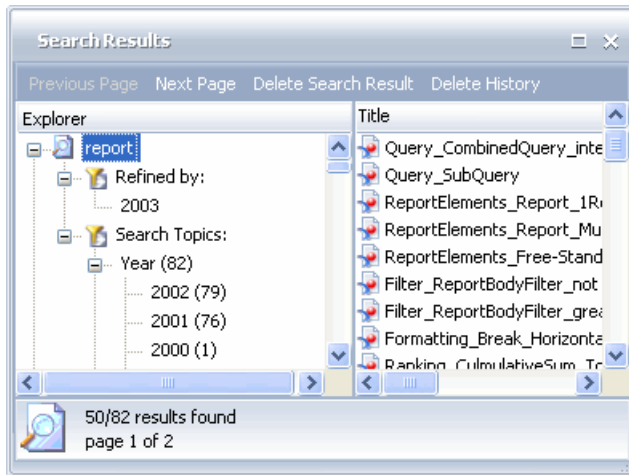
The Search Results dialog appears, displaying the search results.

Managing search results

The Search Results window displays the search results, along with a tree view that displays results history and search categories that you can use to filter the current search results.

4 | Using BI Widgets to Access BI Content

Locating content BI Content on one or more XI R3 servers

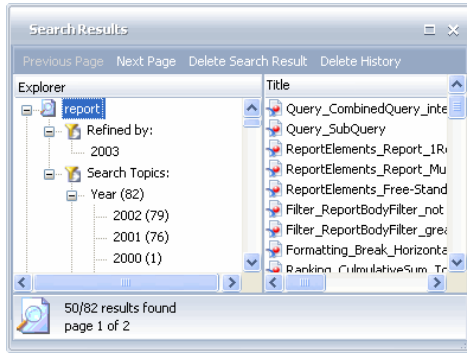


Search results are initially sorted according to their Score. Score represents how well the content matches the search criteria. You can sort the search results list according to any of the following:

- Title
- Score
- Path
- Date Modified

Click on a column heading to sort by that column.

You can use the categories in the Explorer view to refine your search results. Within a search topic, select criteria to filter the results by. BI Widgets will update the results to display only items that match your filter.



If the item is a Web Intelligence or Xcelsius document, you can create desktop widgets by dragging and dropping the item from the search window to the desktop.

Search history

Each time you search, BI Widgets saves the results. You can view all of your search results in the Explorer pane of the Search Results window.

If your search results cannot be displayed on a single Explorer page, use the **Previous Page** and **Next Page** menu options to view the additional pages.

If you no longer need to refer to a saved search, select **Delete Search Result** to remove it from the Explorer pane. Select **Delete History** to remove all search results.

Using BI Widgets Explorer to view content

You can use the BI Widgets Explorer to view content on XI R3 servers and turn that content into desktop widgets.

From the BI Widgets main menu, select **Document List Explorer** to browse available XI R3 server content.

The BI Widgets Explorer securely navigates multiple servers' folders and categories. There are several menu options you can use to customize the Explorer display:

- Show Categories

Select this to display results grouped by category.

- Show Folders

Select this to display results in folder view.

- Refresh

Select this to refresh the results in the Explorer window.

- Views

Select one of the following to set the display mode:

- Icons
- List
- Details

In the list pane, double click on an item to open it. If the item is a Web Intelligence document, it will open in a new window. If the item is an Xcelsius widget it will open inside the Explorer viewing pane.

Drag and drop items onto the desktop from any of these view modes to convert the item into a widget.

Using BI Widgets with Xcelsius documents

This chapter describes several ways to access Xcelsius documents to deploy them as widgets.

Importing an Xcelsius document as a widget

You can easily import Xcelsius files from email, websites, or other sources as widgets.

To import an Xcelsius file as a widget:

1. Right-click the BI Widgets menu and select **Open Widget from disk**.
2. Use the file browser to navigate to the file.
3. Double-click to open the file. It will display on your desktop as a widget.

Opening Xcelsius Documents and Widgets from the Repository

You can open Xcelsius files from either the Explorer or Search Result windows.

From the Explorer window, double click on an Xcelsius file to open it in the viewer pane. Drag and drop a file directly from the list view pane onto the desktop to convert it into a widget without opening the file in view pane.

From the Search result window, double-click on an Xcelsius file to directly convert it into a desktop widget.

Selecting and Opening a Web Intelligence Report

This chapter describes how to access a Web Intelligence document in BI Widgets and how to create and use Report Part Widgets.

Viewing a Web Intelligence Document

The Web Intelligence window includes a toolbar at the top of the window that allows you to:

- Change the zoom level
- Search for a specific text string
- Change report page
- View/Hide the report map
- View the report in page or listing mode
- Refresh the report your assigned XI R2 security rights.

The navigation pane displays the list of reports available in the document. The currently selected report will be highlighted. The navigation map allows the user to navigate reports and report sections. The view pane is automatically synchronized with the selected item in the navigation list.

Creating a Report Part Widget from a Report

To convert Report Part into a Widget , drag and drop the Report Part from the Web Intelligence Viewer onto the desktop. As a widget, the Report Part will include the following BI Widgets features:

- Automatic refresh
- User controlled size and positioning
- Saved display and data context state
- Optional setting as the top application window
- Full XI R3 security
- Web Intelligence opendoc links to detailed reports.

Note:

Report Parts can only be created via drag and drop from Web Intelligence documents.

Creating an Outlook Object from a Report Part

To make an Outlook object from a report part, drag and drop the desired report part from the BI Widgets Web Intelligence Viewer into an Outlook email editing window.

Note:

Outlook must be configured to use Microsoft Word as the text editor, and must be HTML-enabled.

Navigating through Document Links

OpenDocument links allow you to easily navigate BI content, depending on how the BI content is designed.

Opening a Crystal Report, Dashboard, or Analytic

Although you cannot create widgets from Crystal Reports, Dashboards, or Analytics, you can use BI Widgets Explorer to find and open these objects on your local system or the XI R3 repository. See [Using BI Widgets Explorer to view content](#) on page 23 for more information on using the Explorer.

When you have located your Crystal Report, Dashboard, or Analytic, double-click on the report name in the Explorer. The report will open in your internet browser window.

Opening PDF, Excel, Word, and Power Point files

You can open PDF, XLS, DOC, and PPT files from BI Widget. The files will be opened with their associated applications (e.g. Word documents will open in the Microsoft Word application).

4 | Using BI Widgets to Access BI Content

Opening PDF, Excel, Word, and Power Point files



Working with widgets



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BI Widgets allows you to quickly create desktop widgets from Xcelsius and Web Intelligence files. As a widget, an Xcelsius file can automatically update and use report-to-report linking. In addition, the widget gains the following features from the BI Widget framework:

- User controlled size and positioning
- Tabbed views
- Saved display
- Optional setting as the top application window
- Full XI R3 security

Hover your mouse over the widget to display the widget options on the right margin of the widget:


- Close Widget
- Widget Preferences
- Move Widget
- Resize Widget

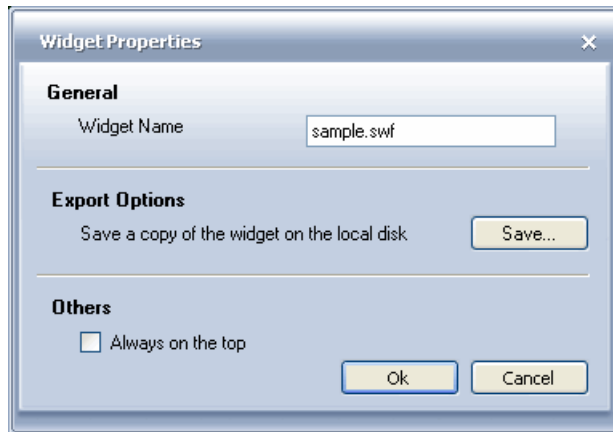
Close Widget

Click the close button to remove the widget from the desktop.

To reopen the widget, use the Search or Explore functions to find the widget, then drag and drop the widget onto the desktop.

Widget Preferences

Click the Preferences button  to access widget preferences. The options available will depend on the widget type.



- **Widget Name**
This is the widget file name. You can type a new name to change the name of the widget.
- **Export Options**
 - Click the Export button to export the widget to the Vista Gadgets Sidebar.
 - Click the **Save** button to save a copy of the widget on the local disk.
- **Always on top**
Check the box to have the widget always appear on top.
- **Refresh Options**
 - Select **Take Data from Latest Instance** to update from the latest instance.
 - Select **Refresh Data directly from Database** to refresh from the database.

Note:

Refresh Options are only available for Web Intelligence reports.

Move Widget


Click and hold the Move button, then move the widget. Release the button to drop the widget in the new location on the desktop.

Resize Widget

Click and hold the Resize button and drag it outward to enlarge the widget, or inward to shrink the widget.

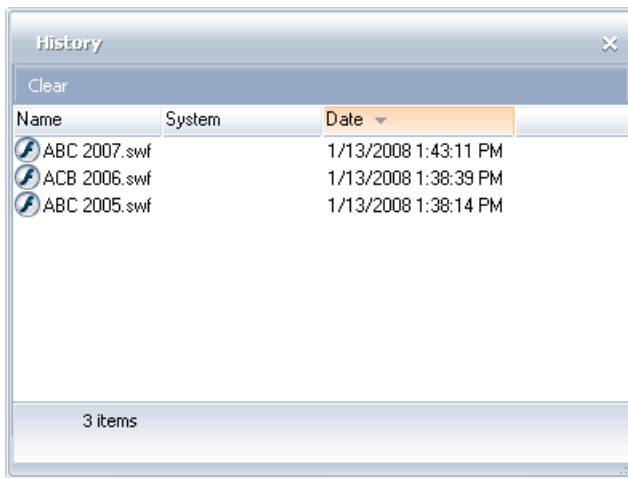
The widget will automatically retain the correct proportions.

Managing widget history

You can reopen closed widgets using Recent Widgets. Right-click the BI Widgets icon  in the taskbar and select **Recent Widgets**.

The Recent Widget menu lists the last 5 widgets that were created onto the desktop.

To view more than the last five widgets, select **More** from the Recent Widget menu.



The The History window displays the last 50 widgets used.

To clear your widget history, select **Clear** from the Recent Widgets menu.

Set Focus

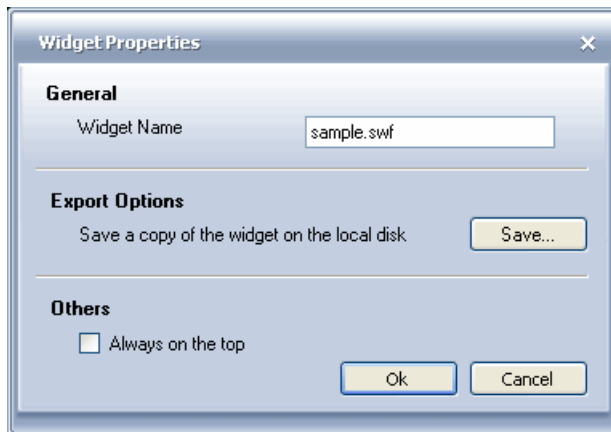
BI Widgets allows you to quickly view open widgets and windows via Set Focus. Set Focus hides other open applications, presents a neutral desktop background, and brings BI Widgets windows and widgets to the foreground.

- Press Shift + F12 to bring the focus to BI Widget

Sharing widgets

You can share ReportParts and Xcelsius widgets with other users. Widgets are saved in a .bidml file; the file can be sent via email and automatically retrieved when the recipient double-clicks the file.

1. Click the **Widget Preferences** button . The Widget Preferences dialog appears.



2. Click **Save**.
The Save Widget dialog opens.
3. Navigate to the location where you want to save the file, type the name, and click **Save**.
The widget is saved as a .bidml file. You can now send this file to other users.

Exporting widgets to Vista Sidebar

You can export widgets to Vista Sidebar using the BI Widgets gadget. This is automatically installed on any machine that has Vista Sidebar installed.

You can find BI Widgets in the Sidebar and in the gadget gallery.

To export a widget to Vista Sidebar:

1. Open the BI Widget from the Sidebar.
2. Select the Widget Preferences icon.
3. Select Export from the Widget Preferences dialog.

The exported widget is added to the BI Widgets Gadget Manager and is displayed in the Sidebar.

Managing Views

Widgets Views allows you to manage which widgets are displayed on your desktop. You can save groups of widgets as a View, and use the tabs in the Views Bar to select a view to display.



This is helpful if you have a lot of widgets that you don't need at all times. You can view a small group of widgets at a time, while keeping the remainder of your widgets connected but not displayed.

Select **Widgets Views** from the BI Widgets menu to manage views.

Show/Hide Views Bar

To hide the Views Bar:

- Click the close button on the Views Bar
- In the BI Widgets menu, select **Widgets Views > Hide Views Bar**.

To show the Views Bar:

In the BI Widgets menu, select **Widgets Views > Hide Views Bar**.

Add a view

There are two ways to add a view:

- From the BI Widgets menu, select **Widgets Views**, then select **Add View**.
- Click the **Add View** button in the Views Bar.

A new view will appear in the View Bar. Type a name for the view.

Select a view

There are two ways to select a view:

- From the BI Widgets menu, select **Widgets Views**, then select a view from the list.
- Click on a view in the Views Bar.

Add widgets to a view

1. Select the drop-down menu for the view, then select **Open Widget**.
The menu lists the available widgets, and displays a checkmark next to each widget that is currently in the view.
2. Select a widget from the list to add it to the view.

Remove widgets from a view

1. Select the drop-down menu for the view, then select **Open Widget**.
The menu lists the available widgets, and displays a checkmark next to each widget that is currently in the view.
2. Uncheck the box next to the name of the widget you want to remove.

Delete a view

Select the drop-down menu for the view, then select **Delete View**, and select one of the following options:

- Delete the view and add the widgets to default view
- Delete the view and delete all widgets in the view.



Creating and Viewing RSS Feeds using the RSS Inbox



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chapter

You can subscribe to RSS feeds and be notified of new RSS entries via the RSS Inbox. Double click on an item in the list view to open the article in a browser.

To subscribe to an RSS feed:

1. Click the **Subscribe** button on the toolbar.
2. Enter a valid RSS feed URL.
3. Click **Subscribe**. The feed will be added to the feeds list.
4. Click **New** in the toolbar to add folders for organizing RSS feeds.



FAQ



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chapter

How do I know if I am connected to a repository?

BI Widgets is a background process that always stays connected to the XI R3 servers you have logged into. The BI Widgets task bar icon displays the connection status:

- The indicator flashes green during login
- The indicator is red when the connection is active

The BI Widget icon does not change color if server connection has been lost. If your server documents are not displaying, open Login Preferences to view the details of server connections.

To reconnect to a disconnected repository, right-click the repository name and select Connect.

What kinds of file types can I convert to widgets?

You can only convert Xcelsius SWF files and Web Intelligence Report Parts to widgets.

Note:

To drag and drop WebI ReportParts into email as widgets, the Outlook text editor must be set to Word, and the email format must be set to HTML.



BI Widgets Content Authoring Guidelines



chapter

BI Widget devotes itself to making viewing and interacting with BI content as intuitive and natural as possible on Windows desktops.

Choosing and Designing Content

An ideal widget is a visually lightweight representation that displays commonly used or updated measures or metrics.

BI content should meet the following criteria to be good candidate for a widget:

- The information changes frequently throughout the day.
- You need to monitor it throughout the day.
- It is displayed in a way that enables you to assess performance.
- It tells you enough about what's going on to know if you need to take action.

If you have a lot of data you would like to display in a widget, consider displaying only the most important and frequently updating information. You can then add links to supporting information.

Authoring Recommendations for Xcelsius Content

Creating a desktop widget or dashboard with Xcelsius allows to to easily create and connect robust visual applications. Because the Xcelsius generated SWF launches inside the BI desktop framework, there are several best practices to ensure you maximize the integration between Xcelsius and BI Widgets.

Choosing a Background

When you load an Xcelsius generated SWF into BI Widget, the existing white canvas background is removed by BI Widgets. The result is that the whitespace in your Xcelsius visualization will remain transparent.

Use Xcelsius backgrounds to ensure that your text and components are visible in the widget. You can use the Xcelsius background component

(located in the art and backgrounds components folder) or import your own background using the image component (.jpg or .swf).

Font settings

When building small widget user interfaces, you may wish to use smaller font sizes. By default, Xcelsius will embed your chosen font and render it as anti-alias, however smaller font sizes can be more difficult to read with anti-alias turned on. Therefore, font sizes smaller than 10 should be non-embedded in order to be read easily in the widget.

When selecting a font size, bear in mind that the widget can be resized on the desktop.

To change the font option, navigate to **File > Font** and click on the **Unicode Font Options** button.


- Use Non-Embedded fonts will render the text without anti-alias
- Use Embedded fonts will render the fonts using anti-alias.

Note:

Using non-embedded fonts will result in a significantly smaller SWF file size.

Designing for BI Widgets Controls

BI Widgets can be resized when they are on the desktop, using the handle at the bottom right corner of the widget. In addition, three additional controls are added to the upper right corner of the widget.

It is important to reduce the canvas size to eliminate any margin around your components. Use the Fit Canvas to Components toolbar button  in Xcelsius to shrink the canvas. You can also manually change the canvas size by navigating to **File > Document Properties**.

Connecting the Visualization to BOE Universe Data with QaaWS

Using Query as a Web Service (QaaWS), you can connect your Xcelsius widget to data represented by XI R3 Universes without writing any code.

You can use Query as a Web Service to generate queries, then map the query to an Xcelsius Web Service Connector component using the QaaWS-provided WSDL URL.

You can bind the input parameters and output data to your model using the Xcelsius web service component. By publishing the SWF file to your BOE repository, you will enable SSO for any end user who opens the dashboard.

Launching a report from a CX Dashboard

Within a desktop widget, you have the ability to launch a parameterized report or Xcelsius dashboard stored in the repository. This report will launch in the BI Widgets viewer window.

Use the FS Command component in Xcelsius to allow opening the documents in InfoView.

There are three fields to configure in the FS Command Component:

- Label
- FS Command

Enter the document ID in the first field.

Enter the query string in the second field.

You can dynamically concatenate the OpenDocument URL and bind it to the second FS Command Field. The URL contains the iDocID, the document Type, and the Host Name

Example URL Syntax

`openDocument.jsp?iDocID=5179&sType=wid&sReportName=Sales Pipeline`

Supported Document Type:wid

Publishing the SWF

You must publish your Xcelsius visualization as a SWF file in order to use it as a widget.

In Xcelsius, select File > Export > Flash (SWF). Save the file to a repository. You can then use BI Widgets to locate and open the SWF as a desktop widget.



Get More Help





appendix

Online documentation library

Business Objects offers a full documentation set covering all products and their deployment. The online documentation library has the most up-to-date version of the Business Objects product documentation. You can browse the library contents, do full-text searches, read guides on line, and download PDF versions. The library is updated regularly with new content as it becomes available.

To access the online documentation library, visit <http://help.sap.com/> and click **Business Objects** at the top of the page.

Additional developer resources

<https://boc.sdn.sap.com/developer/library/>

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:

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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:

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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:

<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/>.

Business Objects product information

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