BI Launch Pad User Guide

■ SAP BusinessObjects Business Intelligence platform 4.0 Feature Package 3

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Contents

Getting Started

1.1 About this documentation

This documentation provides information and procedures for using BI platform and BI launch pad.

BI launch pad runs in a web browser and is the main interface for working with objects in BI platform. Your administrator may deploy different types of objects, such as Crystal reports and Web Intelligence documents, that are created from BI platform plug-in components. You use BI launch pad to view the objects, organize them, and work with them.

Note:
Because the appearance and functionality of BI launch pad can be customized, your user interface may be different from this documentation. However, you can apply most of the information to your user interface.

1.2 Who should use this documentation?

This documentation is intended for users who work with objects over the web through BI platform and BI launch pad.

For more information about BI platform, see the PDF version of the *Business Intelligence Platform User Guide* and the *Business Intelligence Platform Administrator Guide* on the SAP Help Portal at http://help.sap.com.

1.3 What is BI launch pad?

BI platform includes BI launch pad, a web application that acts as a window to business information about your company. In BI launch pad, you can perform the following tasks:

- Access Crystal reports, Web Intelligence documents, and other objects and organize them to suit your needs
- View information in a web browser, export it to other business applications (such as Microsoft Excel and SAP StreamWork), and save it to a specified location

- Use analytic tools to explore the business information in detail

The features of BI launch pad vary by content type, and various applications are available in BI launch pad, if you have the appropriate licenses. For information about the features in your BI platform deployment, contact your system administrator.

Related Topics

• Working with applications in BI launch pad

1.4 What's new in BI launch pad

Integration with SAP StreamWork

The integration of SAP StreamWork with BI launch pad adds social media and activity collaboration features to BI launch pad, enabling you to remain connected with SAP StreamWork users who follow you and your activities. The BI launch pad home tab can be customized to display a "SAP StreamWork feed" module.

On the **Documents** tab, you can track comments posted about public documents in real time. Click **Details** to open a feed panel where you can monitor discussions, reply to comments posted, contribute updates, and start new discussions.

Crystal reports and Web Intelligence documents sent to SAP StreamWork are embedded in activities so that you can collect feedback, track results in a pros-and-cons table, and apply a SWOT analysis or responsibility matrix.

SAP StreamWork is available as a destination for both scheduled and historical instances. When you send a document, you can create a new activity and invite participants.

Personalized placeholders for destinations

You can use personalized placeholders in publications for all destinations, except the default Enterprise location. If you have personalized parameters configured, on the "Destinations" page under **Show options for selected destinations**, personalized parameters for the name, email subject, and email message appear in the **Add placeholder** list.

Each personalized parameter represents the value used to filter the source document for a particular recipient. A personalized placeholder in the name of a publication indicates the publication data has been filtered. Recipients who receive multiple versions of a report or document can identify the unique content in each version, without opening the document.

Individual document names for a publication

When specifying a destination, you can assign a unique name to each source document in a publication. When assigning a name to source documents, you can select one or more placeholders, enter text, or use a combination of text and placeholders.

Bcc

You can include undisclosed recipient names in the **Bcc** box when you choose email as the destination for sending objects or instances, for publishing, or for scheduling.

Related Topics

- Destination options
- Personalized placeholders for publication source document names
- Working with SAP StreamWork

1.5 Licensing

BI platform supports the following types of user licenses:

- BI Viewer
- BI Analyst
- Concurrent user
- Named user

Each license type grants and restricts access to particular tasks and applications. Depending on the license you have, you may be unable to access some applications, create new content, or add documents to the repository. To determine which license you have, contact your system administrator. For more information about licensing, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide* on the SAP Help Portal at http://help.sap.com.

1.6 Before you start

1.6.1 Key concepts

Before you begin, familiarize yourself with the main concepts in BI launch pad. Depending on the tasks you perform, some concepts may not apply to you.

Objects

An object is a document or file created in BI platform or other software that is stored and managed in the BI platform repository.

Categories

A category is an organizational alternative to a folder. Use categories to label objects.

Scheduling

Scheduling is the process of automatically running an object at a specified time. Scheduling refreshes dynamic content or data in the object, creates instances, and distributes the instances to users or stores them locally.

Events

An event is an object that represents an occurrence in the BI platform system. Events can be used for a variety of purposes, including:

- As scheduling dependencies that trigger actions after a scheduled job runs
- To trigger alert notifications
- To monitor BI platform performance

Calendars

A calendar is a customized list of run dates for scheduling jobs.

Instances

An instance is a snapshot of an object that contains data from the time an object was run.

Publishing

Publishing is the process of making personalized dynamic content publicly available for mass consumption.

Profiles

A profile is an object that associates users and groups with personalization values. Profiles are used with Publishing to create personalized content and distribute it to recipients.

Alerting

Alerting is the process of notifying users and administrators when events occur in BI platform.

1.6.2 Key tasks

This section identifies key tasks that you can perform in BI launch pad and topics that contain information about the tasks.

How do I view objects in BI launch pad?

See the Viewing objects chapter.

How do I add objects to BI launch pad?

See the Adding objects to BI launch pad chapter.

How do I change and manage the objects I add?

See the Managing objects in BI launch pad chapter.

How do I distribute content to users?

You can distribute content to users through Scheduling, Publishing, and Alerting.

How do I use SAP StreamWork with content?

See the Working with SAP StreamWork chapter.

How do I set my personal preferences?

See the Setting Preferences chapter.

Related Topics

- Viewing objects
- Adding objects to BI launch pad
- Managing objects in BI launch pad
- Scheduling objects
- About Publishing
- Alerting
- Working with SAP StreamWork
- Setting preferences

BI Launch Pad Basics

2.1 User interface

2.1.1 Header panel

The header panel displays the name of the user account that is logged on to BI launch pad and provides access to the following menus:

- **Applications**: Use to access the applications that plug in to BI launch pad, such as BI workspace. The applications that you can access depend on your access rights and license.
- **Preferences**: Use to set how information appears in BI launch pad.
- **Help Menu**: Use to access the *BI Launch Pad Help* and the "About" page that contains product information.

Click **Log Off** to log off from BI launch pad.

Related Topics

• Documents tab

2.1.2 Home tab

The **Home** tab contains the following default modules, which you use to manage documents and BI launch pad features:

- "My Recently Viewed Documents": lists the last 10 documents that you viewed, sorted by view date, with the most recently viewed document at the top
- "Unread Messages in My Inbox": lists the 10 most recent unread messages in your BI Inbox

  To view all messages, click **See More** in the lower-right corner of the module.
- "My Recently Run Documents": lists the last 10 documents in the repository that you scheduled or ran, with the status of each document instance

To view successful instances or details of failed instances, click an instance link.

- "Unread Alerts": shows the last 10 unread alert notifications

  To view all alert notifications, click **See More** in the lower-right corner of the module.
- "My Applications": provides quick access to the applications in BI launch pad

Custom home tabs

System administrators can create custom home tabs for users and groups that include objects such as a customized dashboard, a frequently used Crystal report, a web site, or the SAP StreamWork module.

If you have the appropriate access rights, you can override a custom home tab in your BI launch pad preferences.

SAP StreamWork home tab

If BI launch pad is integrated with SAP StreamWork and your administrator created a custom home tab, a "SAP StreamWork Feed" module may appear in BI launch pad. The module imports content from SAP StreamWork to all of your activities.

Related Topics

- Setting preferences
- Working with SAP StreamWork

2.1.3 Documents tab

Use the **Documents** tab to view and manage objects in the repository.

2.1.3.1 Toolbar

The toolbar contains the following menus that you use to view and manage objects:

- **View**—Use to view objects, the latest instances of objects, and object properties
- **New**—Use to upload documents and create the following types of new objects:
  - Publications
  - Hyperlinks
  - Folders
  - Categories
- **Organize**—Use to manage object shortcuts and to cut, copy, paste, and delete objects
- **Send**—Use to send objects to destinations. The destinations vary, depending on your configuration.
- **More Actions**—Use to perform the following tasks:

  - Schedule objects
  - Add objects to categories
  - View categories that objects belong to
  - Create OpenDocument links to objects
  - View the history of an object

  The available actions vary, depending on the object type and on your access rights.
- **Details**—Click to show or hide the "Details" panel.

  If SAP StreamWork is integrated with BI launch pad, click to show or hide the "Feed" panel for a document.

Related Topics
- Details panel
- Working with document feeds

2.1.3.2 Navigation panel

The navigation panel provides a top-level view of the folders and the categories in BI platform.

Related Topics
- Drawers

2.1.3.3 Drawers

Drawers are expandable panes on the navigation panel. The following drawers are available:
- **My Documents**—Displays the user's `My Favorites` folder, BI Inbox, alert notifications, and personal categories
- **Folders**—Displays a folder view of the repository
- **Categories**—Displays a category view of the repository
- **Search**—Displays search options and results

Depending on your access rights, you may be unable to view some objects in drawers.

Related Topics
- Navigation panel

2.1.3.4 List panel

The list panel displays a list view of the objects in a folder or a category.

2.1.3.5 Details panel

The "details" panel displays summary information about an object.

If SAP StreamWork is integrated with BI launch pad, this panel is called "Feed" and displays posted comments.

To open the details panel

To open the "details" panel, select the document, and click **Details** on the toolbar. The "details" panel appears on the right side of the window.

To open the document feed panel

Click the **StreamWorks** tab to open the document "feed" panel. The first time you open the "feed" panel, no comments will appear.

Click **Follow** to receive public updates in the document "feed" panel. You can initiate a discussion by entering a comment or question in the **Say Something** box.

Summary details

Summary details include the following information about an object:

- Owner
- Description
- Object type
- Number of instances
- Last run date (for objects that can be scheduled)

If Discussions are enabled, the "details" panel shows posted comments. By default, Discussions are disabled. For more information, contact your system administrator.

Related Topics

- Working with document feeds

2.1.4 Tabs

Tabs display multiple pages and documents in one web browser window. BI launch pad has two default tabs—**Home** and **Documents**. Objects and applications open on separate tabs.

Note:
If your document viewing preferences are set to open objects in windows, objects open in a window instead of on a tab.

Tip:
To view a document in a larger viewing area, click the maximize button in the upper-right corner of the window.

2.2 To log on to BI launch pad

To use BI launch pad, one of the following web browsers must be installed on your computer:

- Microsoft Internet Explorer
- Firefox
- Safari (Macintosh)

1. Open a web browser.
2. Type the URL for BI launch pad: http://`webserver`:`portnumber`/BOE/BI/

   Replace `webserver` with the name of the web server and `portnumber` with the port number for BI platform.

   If your system administrator has configured a custom URL for BI launch pad, you may need to ask your administrator for the name of the web server, the port number, or the URL to enter.

   Tip:
   If you have BI platform client tools installed on Windows, you can click **Start** > **Programs** > **SAP BusinessObjects BI platform 4.0** > **SAP BusinessObjects BI platform > SAP BusinessObjects BI platform Java BI launch pad**.

   By default, you do not need to enter a system name. However, some enterprise systems may require it.

3. If prompted, in the **System** box, type the name of your Central Management Server (CMS).
4. In the **User name** box and the **Password** box, type your logon credentials.

   By default, you are not asked to choose an authentication type. However, some enterprise systems may require it.

5. If prompted, in the **Authentication** list, select an authentication type.

Enterprise authentication is the default authentication method. LDAP, Windows AD, Windows NT, and other third-party authentication types require a special configuration. If you are unsure of which authentication type to use, contact your system administrator. For information about authentication types, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

6. Click **Log On**.

   BI launch opens, and the default **Home** tab appears.

   Note:
   You can choose any home tab as your default view. If your administrator has configured BI launch pad to integrate with SAP StreamWork, your default view may be an "SAP StreamWork" tab.

Related Topics

• To set general preferences

Setting Preferences

3.1 Setting preferences

Preferences determine how you log on to BI launch pad, which views appear, and which settings apply to viewed objects.

The access rights assigned by your system administrator determine whether you can set your own preferences. If your administrator configured preference settings for you, you cannot change them. Before you start using BI launch pad, check whether your preferences have been set—and set them, if they are not configured.

3.1.1 To set general preferences

You can set preferences to determine which information appears in the default view of BI launch pad. You can choose to use the preferences defined by your system administrator or to enter custom preferences. The initial settings in the "Preferences" dialog box are configured by your system administrator.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **General**.
4. Clear the **Use Default Settings (Administrator defined)** check box.

   The options in the dialog box become editable but contain the default values until you change them. If your administrator updates your user group, the changes will not be reflected in a customized view of BI launch pad.

   Tip:
   To return the BI launch pad view to the default preferences set by your administrator—including any updates implemented after you customized the view—select the **Use Default Settings (Administrator defined)** check box. The options in the "Preferences" dialog box are updated to show the inherited values, and the values become read only.
5. Choose the default view for BI launch pad:

a. If you want the **Home** tab to appear when you first log on, click **Home tab**, and choose one of the following options:
   - To choose the default view that your administrator configured, click **Default Home tab**. If your administrator did not configure a default BI launch pad view, the **Home** tab in BI platform is used.
   - To choose a custom view, click **Select Home tab**, click **Browse Home tab**, choose a tab in the "Select a Custom Home tab" window, and click **Open**.

     If your BI administrator created a workspace for SAP StreamWork, it is listed in the "Select a Custom Home tab" window.

b. If you want the **Documents** tab to appear when you first log on, click **Documents**, and select the drawer and node to open by default.

   For example, if you want the **My Documents** drawer to open to your BI Inbox when you first log on, click **My Documents**, and click **My Inbox**.

6. Under **Choose columns displayed in Documents tab**, select the column headings to display in the summary information, for each object in the list panel:
   - **Type**
   - **Last Run**
   - **Instances**
   - **Description**
   - **Created By**
   - **Created On**
   - **Location (Categories)**
   - **Received On (Inbox)**
   - **From (Inbox)**
   - **SAP StreamWork / Discussion Status** (if available)
7. Under **Set document viewing location**, choose whether to open documents on a new tab or in a new browser window.
8. In the **Set the maximum number of items per page** box, type the maximum number of objects to display per page when viewing lists of objects.
9. Click **Save & Close**.

Related Topics

• To log on to BI launch pad

3.1.2 To change your password

Depending on your access rights, you may not be able to perform this task. For information, contact your system administrator.

1. Log on to BI launch pad.

2. On the header panel, click **Preferences**.
3. Click **Change Password**.
4. In the **Old Password** box, type your old password.
5. In the **New Password** box, type your new password.
6. In the **Confirm New Password** box, retype your new password.
7. Click **Save & Close**.

Related Topics

- To log on to BI launch pad

3.1.3 Preferred viewing locales

The preferred viewing locale (PVL) sets how dates, times, and numbers are formatted. For multilingual objects, the PVL also determines the language used to display an object's name and description. If an object has multiple translated names and descriptions, the display language is determined in the following way:

1. The system displays the name and description that correspond to the user's PVL.

   BI platform may use a default fallback locale, but it is typically a variation of the user's PVL. For example, if the PVL is French (Canada) and the object does not have a translated name and description in Canadian French, BI platform will use French (France).

2. If no PVL is set, BI platform displays the name and description in the same language as the product locale.
3. If none of the preceding options is feasible, BI platform displays the name and description in the object's source language.

3.1.3.1 To set locale and time zone preferences

Before scheduling objects to run, check the time zone selected in the "Preferences" dialog box. The default time zone is local to the web server that is running BI platform, not to the Central Management Server (CMS) computer to which a user connects. Properly setting the time zone ensures that scheduled objects are processed in the time zone in which you are working.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.

3. Click **Locales and Time Zone**.
4. In the **Product Locale** list, select the language that you want BI launch pad to use.

5. In the **Preferred Viewing Locale** list, select a locale that uses the formatting conventions for dates, numbers, and time that you want to use when viewing objects.

   This option also determines in which language names and descriptions of multilingual objects will appear.
6. In the **Current Time Zone** list, select your time zone.
7. Click **Save & Close**.

Related Topics

• To log on to BI launch pad

3.1.4 To set Crystal report viewing preferences

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Crystal Reports**.
4. Under "Select a default view format", select a viewer for displaying Crystal reports:
   - **Web (no downloading required)**

     This viewer does not download files and will work without Java or ActiveX.
   - **Web ActiveX (ActiveX required)**

     This viewer is available if you use a version of Microsoft Internet Explorer that supports ActiveX controls.
   - **Web Java (Java required)**

     This viewer is designed for web browsers that support the Java Virtual Machine.

   Note:
   You cannot use the **Web ActiveX** and **Web Java** viewers to view reports created in SAP Crystal Reports for Enterprise. You must use the **Web (no downloading required)** viewer.
5. If you selected the **Web (no downloading required)** viewer, under "Select printing control (for Web)", perform one of the following actions:
   - Click **PDF one-click printing (Adobe Acrobat required)** if you want the viewer to export reports to PDF so that you can print PDF files. If a report has Flash objects that you want to print, you must print to a PDF file.
   - Click **ActiveX one-click printing (ActiveX required)** if you want to print reports from the Crystal report viewer. This option requires the installation of a small ActiveX component.

6. If you selected the **Web (no downloading required)** viewer, under "Select a rendering resolution (for Web)", choose a viewing resolution.
7. Under "Select a default measuring unit", select **Inches** or **Millimeters**.
8. Select the **Show SAP Variable Technical Name (SAP Crystal Reports 2011 only)** check box if you want to see the technical names of SAP variables when you work with reports in SAP Crystal Reports 2011 format.
9. Click **Save & Close**.

Related Topics

- To log on to BI launch pad
- Web viewer
- Web ActiveX viewer
- Web Java viewer

3.1.5 To set BI workspaces preferences

1. Log on to BI launch pad.
2. On the main menu, click **Preferences**.

   The "Preferences: Administrator" dialog box appears.
3. Under "Preferences", click **BI workspaces**.
4. In the **Select a default style to use when creating a new page** list, select the page format to apply to new BI workspaces.
5. Click **Save & Close**.

3.1.6 To set Analysis edition for OLAP preferences

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Under "Preferences", click **Analysis edition for OLAP**.
4. If you want to use a screen reader with Analysis edition for OLAP, select the **Accessibility Mode** check box.
5. Click **Save & Close**.

3.1.7 Web Intelligence preferences

3.1.7.1 To select a reading interface for Web Intelligence documents

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under "View", choose a reading interface for viewing Web Intelligence documents:

Option	Description
Web (no download required)	Enables you to view documents online, without downloading components
Rich Internet Application (download required)	Installs and runs a Java applet that lets you view documents
Desktop (Windows only) (installation required)	Installs and runs a desktop application that lets you view documents
PDF	Enables you to view documents as a PDF file

   All reading interfaces, except the **PDF** option, have view and design modes. Use the view mode to perform basic viewing tasks and the design mode to modify the document you are viewing. The only difference between reading interfaces is that two of them require you to download components.
5. Click **Save & Close**.

Related Topics

• To log on to BI launch pad

3.1.7.2 To select a modification interface for Web Intelligence documents

Use a modification interface to create and/or edit Web Intelligence documents.

1. Log on to BI launch pad.

2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under Modify, select a modification interface for creating and editing Web Intelligence documents:

Option	Description
Web (no download required)	Enables you to create and modify documents online, without downloading components
Rich Internet Application (download required)	Installs and runs a Java applet that lets you view documents
Desktop (installation required)	Installs and runs a full desktop application that lets you view documents **Tip:** Select this option if you plan to work offline occasionally.

   All modification interfaces have similar features and capabilities. The only difference between modification interfaces is that two of them require you to download components.
5. Click **Save & Close**.

Related Topics

• To log on to BI launch pad

3.1.7.3 To select a default universe

You can specify a universe to use as the default data source for Web Intelligence documents.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.
   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under "Select a default Universe", click **Browse**, and choose an option:
   - To select a default universe when you create documents, select a universe in the list.
   - If you do not want to set a default universe, click **No default universe**.
5. Click **OK** to return to the "Preferences" dialog box.
6. Click **Save & Close**.

3.1.7.4 To select a formatting locale for Web Intelligence documents

The preferring viewing locale (or PVL) determines how dates, times, and numbers are formatted in Web Intelligence documents.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under "When viewing a document", choose a locale:
   - Click **Use the document locale to format the data** to maintain the locale used when a document was created.
   - Click **Use my preferred viewing locale to format the data** to use your preferred viewing locale in BI launch pad.
5. Click **Save & Close**.

Related Topics

• To log on to BI launch pad
• Preferred viewing locales

3.1.7.5 To set the drill options

You must specify how Web Intelligence documents should behave when you drill up or drill down on data. Drilling on data makes the view of data more or less detailed. For example, you might drill down on data grouped by country to view it grouped by region, or you might drill up on data grouped by city to view it grouped by country.

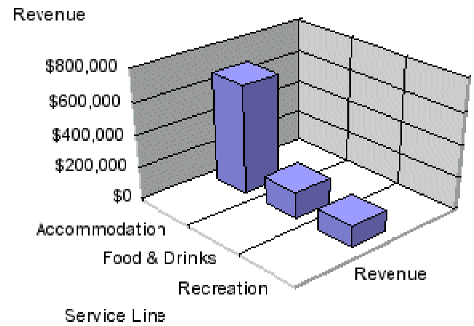
When you start drill mode, the "drill" toolbar automatically appears at the top of a report and displays the value(s) on which you drilled. The values filter the results that appear on the drilled report.

Each table, chart, or free-standing cell in a report represents a specific block of data. You can drill on a report with multiple report blocks in the following ways:

- Synchronize drill on report blocks
- Drill on only the selected block

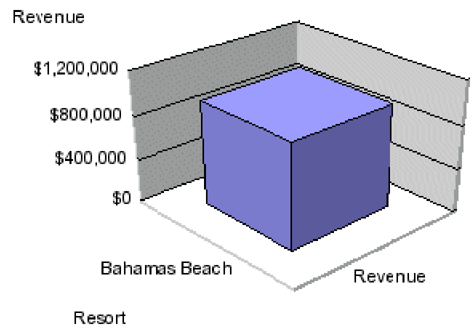
The following examples show how each option affects a report when you drill down on a table to analyze detailed results per service line. In the first example, **Synchronize drill on report blocks** is selected and both the table and the chart display the drilled values:

Service Line	Revenue
Accommodation	$673,664.00
Food & Drinks	$169,680.00
Recreation	$128,100.00



In the second example, **Synchronize drill on report blocks** is not selected. The drill is only performed on the selected block and only the table displays the drilled values:

Service Line	Revenue
Accommodation	$673,664.00
Food & Drinks	$169,680.00
Recreation	$128,100.00



You must have the necessary access permissions to drill out of the scope of analysis in a drill session. For example, when you drill on results in a document, you may want to drill to higher-level or lower-level information than is included in the scope of the document. This requires a new query to retrieve additional data from the data source, and you will be prompted to decide whether to run the additional query. For example, if you drill on year 2001, the results on the drilled table are for Q1, Q2, Q3, and Q4 of 2001. This means the quarterly values that you drilled to are filtered by 2001. The "drill" toolbar displays 2001, the value that filters the drilled results.

You can use the "drill" toolbar to select other values and filter the results differently. For example, if you use the "drill" toolbar to select 2002, the results on the drilled table will be for Q1, Q2, Q3, and Q4 of year 2002.

If a drilled report includes dimensions from multiple queries, when you point the cursor at a value on the filter, a tooltip indicates the name of the query and the dimension for the value.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under "View", select either the **Web (no download required)** or **Rich Internet Application (download required)** reading interface.

5. Under "Drill options", choose general options to apply to drill sessions:
   a. To be prompted when a drill action requires a new query to add data to a document, click **Prompt when drill requires additional data**.

      The prompt may allow you to apply filters to the extra dimensions in the new query. This means you can restrict the size of a query to just the data necessary for your analysis.
   b. To synchronize drilling on all report blocks, click **Synchronize drill on report blocks**.
   c. To hide the "drill" toolbar when you switch to drill mode, click **Hide Drill toolbar on startup**.

      The "drill" toolbar is hidden (for example, when you do not want to select filters during a drill session).
6. Under "Start drill session", choose an option to apply to drill sessions:
   a. To retain a copy of the original document so that you can compare drilled results to the original data, click **On duplicate report**.

      A duplicate of the original report is created. When you end drill mode, both the original report and the drilled report remain in the document for viewing.
   b. To drill on the current report so that it is modified by your drill actions, click **On existing report**.

      When you end drill mode, the report displays the drilled values.
7. Click **Save & Close**.

Related Topics
- To log on to BI launch pad

3.1.7.6 To select an Excel format

The Microsoft Excel format you select determines the appearance of data in instances of Web Intelligence documents when you schedule or export the documents to Excel.

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.

   The "Preferences" dialog box appears.
3. Click **Web Intelligence**.
4. Under "Select a priority for saving to MS Excel", choose the option that best fits your needs:
   - To display data in a format that is similar to SAP BusinessObjects Web Intelligence, click **Prioritize the formatting of the documents**.
   - To display data in a text format, click **Prioritize easy data processing in Excel**.
5. Click **Save & Close**.

Related Topics
- To log on to BI launch pad

Viewing Objects

4.1 Viewing objects

BI launch pad uses tabs to display its main navigation interfaces, the **Home** tab and the **Documents** tab, and objects that you open for viewing or editing. When you select a document for viewing or editing on the **Documents** tab, the document opens on its own tab, where you can then open the document in its own window if necessary.

The way that you view an object affects which information you see. For example:

- If you view a dynamic content document (for example, a Crystal report or a Web Intelligence document) by double-clicking the object in the list panel, the latest instance of the document opens. If the latest instance is unavailable, the object itself opens.
- If you view an object by clicking **View** > **View**, the object opens.
- If you click **View** > **View Latest Instance**, the latest object instance opens.
- If you view a publication or program object, BI launch pad displays the object properties, if the latest instance is unavailable.

Related Topics

- Tabs
- To view an object

4.1.1 To view an object

When you view a Crystal report or Web Intelligence document in BI launch pad, your access rights and the default settings configured by your administrator determine which data you see. You can view a report with data directly from the data source, from the latest instance of an object, or from its saved data. If you have the necessary rights, you can refresh a report or a document with new data from its data source.

To view the object on demand, click **Refresh** in the object viewer. To view an older instance, select the object in the list panel, click **More Actions** > **History**, and double-click the instance that you want to view.

Note:
Refreshing an object may use a considerable amount of system resources. Refresh objects only when you think it is likely that data has changed.

Note:
If an option is not available, you do not have access rights to that option.

- On the **Documents** tab, locate and double-click an object.

  If the object is a dynamic content document (for example, a Crystal report or a Web Intelligence document), the latest instance of the document opens. If the latest instance is unavailable, the object itself opens. For publications and program objects, the object properties open if the latest instance is unavailable.

Related Topics
- To schedule an object
- To view the history of an object

4.1.2 To pin a tab for future viewing

Your BI launch pad preferences must be configured to enable tabbed document viewing.

You can pin documents and instances that you frequently view to the BI launch pad user interface so that they open as tabs the next time you log on to BI launch pad.

Note:
To unpin a tab, click the **pin** icon so that it points sideways.

1. On to the **Documents** tab, in the list panel, locate and select the object that you want to view.
2. Open the object or object instance:
   - To open the object, click **View** > **View**.
   - To open the latest instance of the object, click **View** > **View Latest Instance**.
   - To open an older instance of the object, click **More Actions** > **History**, and select the instance in the "History" dialog box.

   The object or instance opens on its own tab.
3. Click the **pin** icon in the upper-right corner of the main BI launch pad window.

The **pin** icon points downward, indicating that the tab is pinned.

Related Topics
- Tabs
- To set general preferences

4.2 Viewing Crystal reports

When you click a Crystal report, the report appears in a viewer. Depending on the type of viewer you have, you can perform different tasks. The following section provides information about the Crystal report viewer toolbar and instructions about how to work with reports.

Related Topics

• Crystal report viewers

4.2.1 Crystal report viewers

Use Crystal report viewers to view reports, navigate multiple pages, refresh data, drill down to details behind charts and summarized data, select parameters, print, and export data. You can use Crystal report viewers to display reports even when you are not connected to BI platform.

Online Crystal report viewers support ActiveX, Java, and web-only viewing formats. Typically, your system administrator selects the viewer type that is best suited to your company's needs. However, you can manually select a viewer type in your BI launch pad preferences.

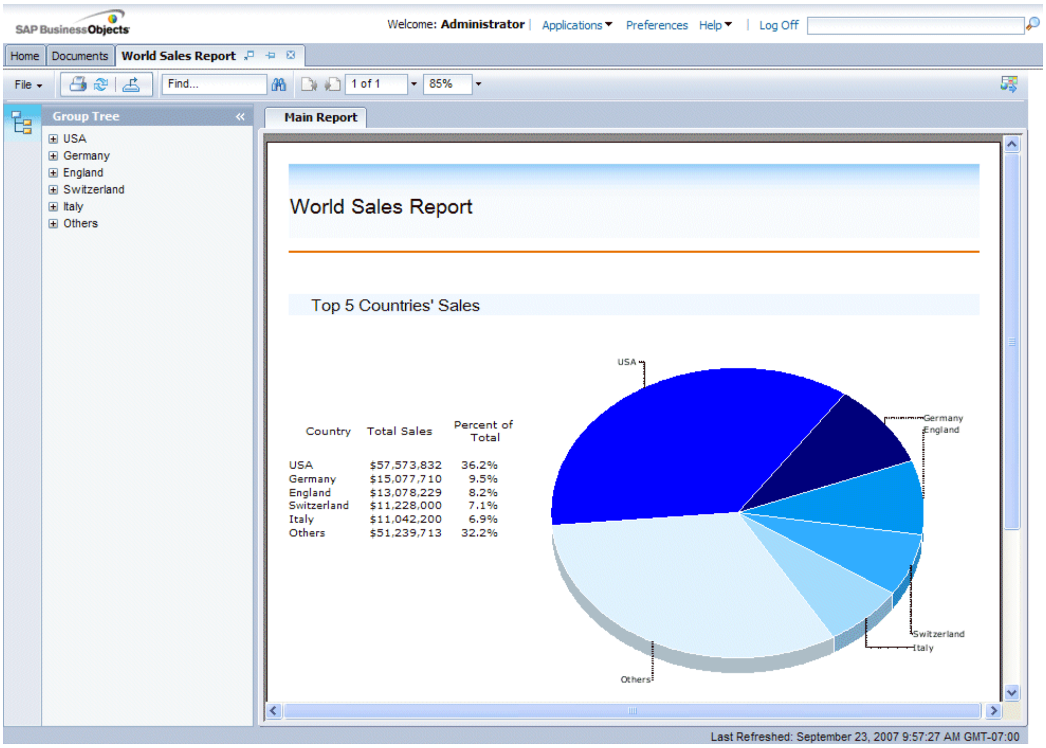
Note:
Some features of Crystal report viewers may be disabled by your administrator. For more information, contact your administrator.

Related Topics

• To set Crystal report viewing preferences
• SAP Crystal Reports viewer 2011

4.2.1.1 Web viewer

You can access the Web viewer in a browser, without downloading a plugin. Choose this viewer to view, refresh, and print reports, edit parameters, and export reports to a variety of formats.



The "Web viewer" toolbar includes the following functions:

- **File** menu:
  - **Open**
  - **Send To**
  - **Create Shortcut In My Favorites**
  - **Schedule**
  - **History**
- **Print this report**
- **Refresh report**
- **Export this report**
- **Search for text**
- **Go to previous page**
- **Go to next page**
- **Page field**
- **Go to first page**
- **Go to last page**
- **Zoom**

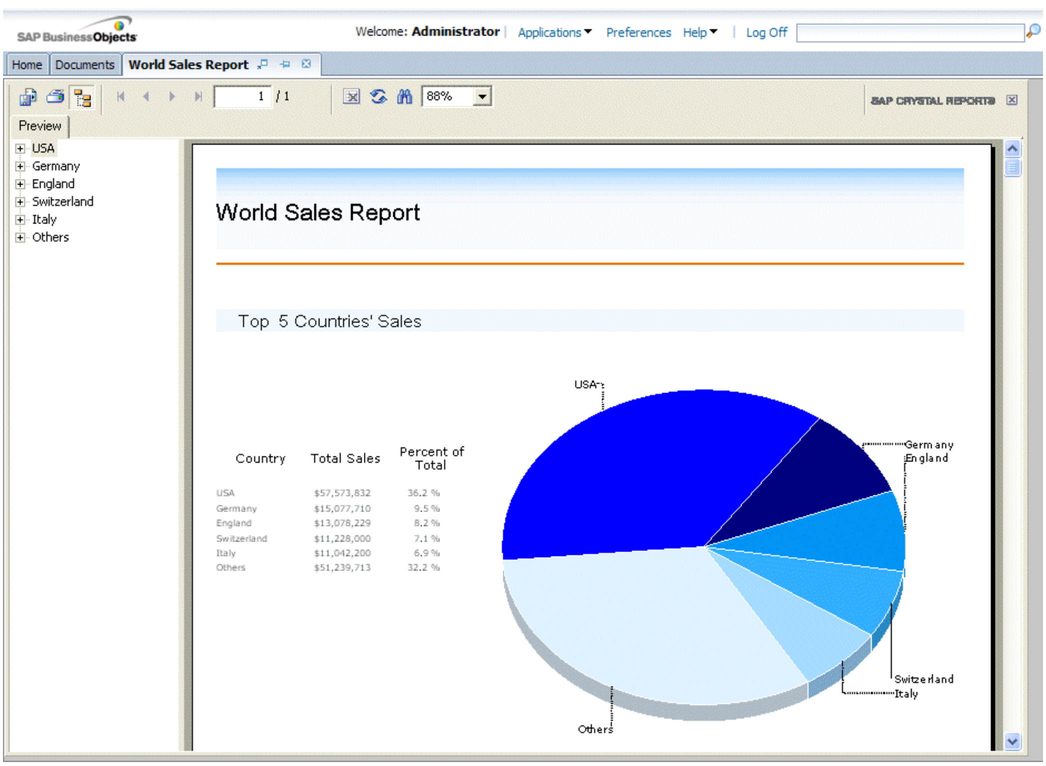
Choose **File** > **Open** option to open Crystal reports stored in the repository. All other **File** menu options function the same as options in the BI launch pad **File** menu. To access the "Group Tree" or the "Parameter panel", click icons on the left side of the Web viewer.

Note:
The Web viewer is the only Crystal report viewer that can access the "parameter panel" and that lets you view reports created in SAP Crystal Reports for Enterprise.

Related Topics
- SAP Crystal Reports viewer 2011

4.2.1.2 Web ActiveX viewer

The **Web ActiveX** viewer can be used with Microsoft Internet Explorer versions that support ActiveX controls. You must download and install an ActiveX component. Choose this viewer to view, refresh, and print reports and export them to a variety of formats.



The "Web ActiveX viewer" toolbar includes the following functions:

- **Export report**
- **Print report**
- **Toggle group tree**
- **Go to first page**

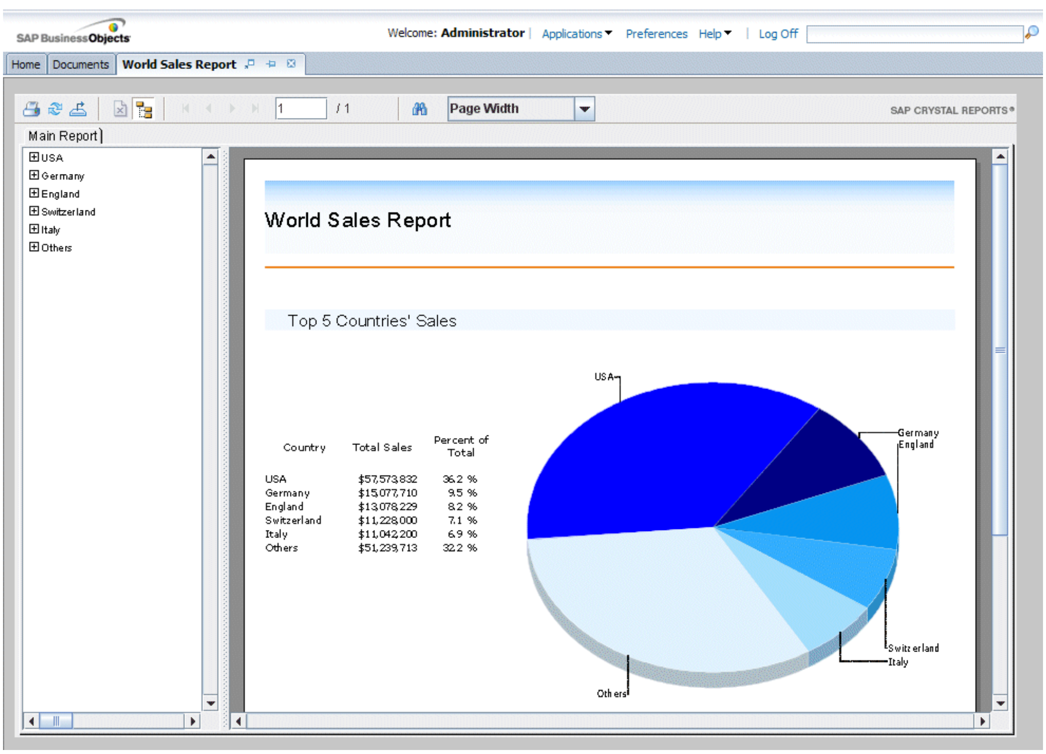
- **Go to previous page**
- **Go to next page**
- **Go to last page**
- **Go to page**
- **Stop loading**
- **Refresh**
- **Search text**
- **Zoom**
- **Close current view**

Related Topics

• Viewing Crystal reports

4.2.1.3 Web Java viewer

You can access the **Web Java** viewer in any web browser that supports the Java Virtual Machine. Choose this viewer to view, refresh, and print reports and to export reports to a variety of formats.



The "Web Java viewer" toolbar includes the following functions:

- **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**

Hover the mouse pointer over a button on the toolbar to display a description of the button in the left side of the browser status bar.

Note:
You may experience minor problems when scrolling through reports in the **Web Java** viewer. The problems result from the implementation of the Java Virtual Machine in some web browsers. If you experience problems, click the scroll buttons repeatedly to scroll; do not hold down the scroll buttons.

Related Topics

• Viewing Crystal reports

4.2.2 Crystal report viewer toolbar

Option	Description
Export this report	Exports a Crystal report to your local computer or to a location on a network
Print this report	Prints a report
Group Tree	Shows/hides the "Group Tree". When the "Group Tree" is open, use it to navigate through data in a report.
Parameter Panel	Shows/hides the "Parameter panel". When the "Parameter panel" is open, use it to change data in a report and how data is displayed. You can access the "Parameter panel" only in the Web viewer.

Option	Description
Navigation	Allows you to move through the pages of a report. You can choose **First Page**, **Go to Previous Page**, **Go to Page**, **Go to Next Page**, or **Go to Last Page** in the list.
Refresh Report	Obtains the most current data from a report's data source. In order to refresh a report, you must have the necessary access rights and the server must contain the necessary data source information.
Search for text	Use for a text search
100% **Zoom**	Use to zoom in or out on a report

Tip:
After drilling down a report, you can use the report tabs to navigate the report.

Related Topics

• Web viewer

4.2.3 SAP Crystal Reports viewer 2011

SAP Crystal Reports viewer 2011 is installed locally on your computer. This means you can view downloaded Crystal reports without connecting to BI platform.

Use SAP Crystal Reports viewer 2011 to perform the following tasks:

- Print or export reports
- Save reports
- Select data to view
- Drill down in reports for more details
- View multiple reports

SAP Crystal Reports viewer 2011 functions the same as the Crystal report viewers in BI launch pad.

For more information about tasks you can perform with SAP Crystal Reports viewer 2011, see the SAP Crystal Reports Viewer 2011 Help.

4.2.3.1 To install SAP Crystal Reports viewer 2011

When you install the Crystal Reports viewer, it resides locally as a client-side viewer on your computer.

Note:
This procedure only applies to the English language web site.

1. Log on to http://www.sap.com/solutions.
2. Point to **SAP BusinessObjects Portfolio** and click **SAP Crystal Solutions**.
3. Point to **Query, Reporting & Analysis** and click **SAP Crystal Reports Viewer**.

   The **Download Now** link appears on the right side of the BI launch pad window.
4. Download and run the SAP Crystal Reports 2011 viewer installation program.
5. Follow the onscreen instructions, accepting the default values when possible.
6. Click **Finish**.

4.2.3.2 Opening SAP Crystal Reports viewer 2011

SAP Crystal Reports viewer 2011 opens when you double-click a Crystal report (.rpt) file on your computer.

Note:
If SAP Crystal Reports is installed on your computer, it takes precedence over the SAP Crystal Reports viewer 2011 and displays your reports by default.

4.2.4 To drill down in Crystal report data

You can drill down in a report to see the data beneath charts and summarized groups. Click a chart or a summary to see detailed data.

- In a Crystal reports viewer, double-click a link in a report to display detailed information about that link.

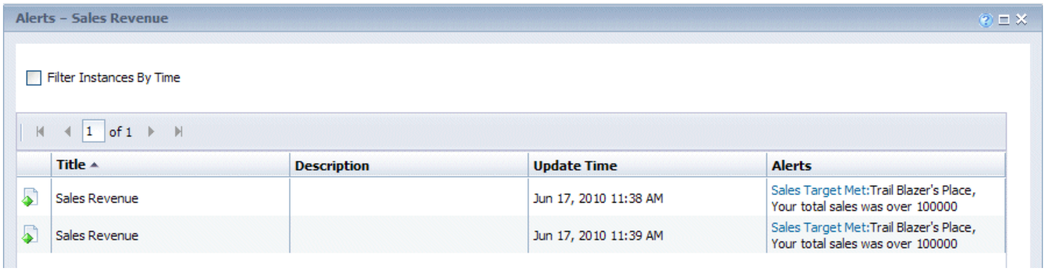
4.2.5 To view alerts in Crystal reports

BI platform tracks report instances that trigger alerts.

This task applies only to reports created in SAP Crystal Reports.

1. Locate the folder or category that contains the Crystal report you want to view.
2. Select an object, and click **More Actions** > **Alerts**.

The "Alerts" dialog box appears, displaying the instances that triggered an alert.



3. Double-click the title to open the report instance.

Related Topics

- Differences between alerting and Crystal report alert notifications

4.2.6 To view and edit the parameters of Crystal reports in the Web viewer

1. Locate and select the Crystal report that you want to view.
2. Click **View** > **View**.
3. If you are prompted to enter report values, enter the values.
   You must enter report values before you can view the report.
4. Select the data you want to view, and click **OK**.
5.  To view the parameters that you can access in the report, click the **parameters** icon.
   The parameter panel displays the report parameters.
6. Select a parameter.
7. To edit the parameter value, perform either of the following steps:
   - In the "parameter" panel , type a new value.
   - Click **>** to open an editing dialog box, type the new values, and click **OK**.
8. Edit additional parameters as needed.
9. To view the report with the new parameter values, click **Apply**.

4.2.7 To print Crystal reports

You can print successful instances of reports and reports that you view on demand.

Note:

- Depending on the Crystal report viewer you use, the steps in this task may vary. However, the general principles for printing reports are the same. If onscreen instructions are provided, follow those instructions instead of the steps in this task.
- The person who designs a report chooses the page orientation. You cannot change it in the "Print" dialog box.

1. Open the document that you want to view.
2. On the "viewer" toolbar, click **Print Report**.

   The "Print" dialog box appears.
3. In the "Print range" area, select **All Pages**, or type a range of pages.
4. In the "Copies" area, type the number of copies to print.

   Tip:
   If you select the **Collate** option, pages are printed in numerical order. For example, if you are printing two copies of a four-page report, your report prints pages one, two, three, and four of the first copy and then prints pages one, two, three, and four of the second copy.
5. (Web viewers and Web ActiveX viewers) In the "Printer Paper" area, select the paper size and the paper source options.
6. (Web viewers and Web ActiveX viewers) In the "Options" area, if a Crystal report is wide and you want it to fit on one page when it prints, click **Fit Horizontal Pages to One Page**.
7. If you want to print Flash objects embedded in a Crystal report, select **Print Flash Objects for Current Page**.
8. Click **OK**.

4.2.8 To export Crystal reports

You can export successful instances of Crystal reports and reports that you view on demand to multiple formats. For example, you can export data that predicts sales trends to an Excel spreadsheet and then email it to the sales team.

Tip:
For reports you can drill down on, export the drilled-down view.

1. Open the Crystal report that you want to view.
2. On the "viewer" toolbar, click **Export Report**.

   The "Export" dialog box appears.
3. In the **File Format** list, select the file format that you want to export the Crystal report to.
4. In the "Page Range" area, select **All Pages**, or type a range of pages.
5. Click **Export**.

4.2.8.1 Export format options

When you export a report to a file format other than SAP Crystal Reports (.rpt), the report may lose some or all of its formatting. However, BI launch pad attempts to preserve as much formatting as the export format allows. You can export reports to the following file formats:

- SAP Crystal Reports (.rpt)

  You cannot export to this format from a drilled-down view.

- SAP Crystal Reports read only format (.rptr)
- Adobe Portable Document Format (.pdf)
- Microsoft Excel (1997-2003) (.xls)

  This format attempts to preserve the look and feel of your original report.

- Microsoft Excel (1997-2003) (.xls) data-only version
- Microsoft Word (1997-2003) (.doc)

  This format maintains as much formatting as possible, including graphics. Each object appears in an individual text field.

- Microsoft Word (1997-2003) (.doc)—editable

  This format preserve less formatting than the Microsoft Word (1997-2003) (.doc) format. Text appears in lines, and images are placed inline with text.

- Rich Text Format (.rtf)

  This format is similar to Microsoft Word (1997-2003).

- Separated Values (CSV)

  This format is only available from the Web viewer.

- Extensible Markup Language (.xml)

Note:
Flash objects only appear if you export to a Crystal report or to Adobe Portable Document Format (.pdf). Fallback images appear when exporting to all other formats.

For more information about options for scheduling a Crystal report to a specific format, see exporting information in the *SAP Crystal Reports 2011 Users Guide*.

Related Topics

• Additional formatting options for Crystal reports

4.2.9 To sort data interactively

1. Open a Crystal report that uses interactive sorting.
2. Choose a value to sort by.
3. Click the appropriate arrow to sort data in the report:
   - To sort data in ascending order, click .
   - To sort data in descending order, click .

4.3 Viewing Web Intelligence documents

When you open a Web Intelligence document, the document appears in a viewer. Depending on the type of viewer and the functions enabled by your system administrator, you can perform different activities.

The following sections provide information about the Web Intelligence toolbar and instructions for working with the navigation map, displaying user prompts, finding text, and drilling down on data in documents.

For instructions on performing analysis on Web Intelligence documents, see the SAP BusinessObjects Web Intelligence documentation.

4.3.1 Web Intelligence viewer toolbar

Option	Description
Web Intelligence	Use this menu to show or hide the following parts of the BI launch pad user interface: • Filter Bar • Outline • Left pane • Report tabs • Status bar
Open	Opens another Web Intelligence document for viewing
Save	Saves changes to a document to various file formats, with a new name, and locally on your computer
Print	Creates a PDF version of a document for printing
Find	Searches for text in ah document
History	Shows the dates of document instances
Send	Sends a document to a destination. The available destinations vary, depending on how BI launch pad is configured.
Undo	Reverses the previous action
Redo	Performs the previous action again
Refresh	Refreshes the current tab or the entire document
Track	Sets options for tracking changes
Drill	Drills up or down the document data
Filter Bar	Shows or hides the Filter Bar

Option	Description
Outline	Shows or hides the document outline
Reading	Enables viewing of a document in HTML or PDF mode
Design	Enables modification of the document you are viewing

4.3.2 To display the navigation map

Use the navigation map to locate reports in a Web Intelligence document.

1. Open the document that you want to view.
2. Click **Web Intelligence** > **Left Pane** > **Normal**.

   The left pane opens.
3.  Click the **navigation map** icon.

4.3.3 To display user prompts

Prompts gather information from users. For Web Intelligence documents, this information can determine which data appears in the document.

For example, in a document used by sales, a prompt may ask users to choose a region. When a user chooses a region, the document includes results for that region instead of results for all regions in the document.

1. Open the document that you want to view.
2. Click **Web Intelligence** > **Left Pane** > **Normal**.
3.  On the left pane, click the **user prompt input** icon.

4.3.4 To find text

1. Open the document that you want to view.

2.  On the viewer toolbar, click **Find**.
   The find panel appears at the bottom of the document.
3. In the **Find** box, type the text that you want to locate.
4.  Click the arrow beside the **Run find** button, and select **Ignore case** or **Match case**.
5. Click **Run find**.
6. (Optional) Choose whether to search for the previous occurrence or the next occurrence.

4.3.5 To drill on document data

You can drill down on document data to see the information beneath charts and summarized groups.

1. Open the document that you want to view.
2. Click **Drill** > **Start Drill mode**, and click a link in the document that you want to drill down on.
3. When the viewer enters drill mode, click **Drill** > **Snapshot** to take a photograph of the drilled view and open it on a new tab.
4. To apply filters to your view of the document, click **filter bar** on the Web Intelligence viewer toolbar and set the filters.
5. Click **Drill** > **End Drill mode**.

Working with Objects

5.1 Managing objects in BI launch pad

All documents and files in BI platform— hyperlinks, shortcuts, Crystal reports, and Web Intelligence documents—are considered objects. BI platform uses folders and categories to organize objects. Objects must belong to one folder but can be assigned to several categories or to no category at all.

Folders and categories can be either public (that is, corporate) or personal. Any BI launch pad user with the necessary rights can view public folders and categories. However, you can add and edit objects in public folders and categories only if you have the necessary rights. Personal categories and your `My Favorites` folders are for your use; you can create new folders and categories and arrange objects within them as needed. Personal categories and your `My Favorites` folders are private and cannot be viewed or altered by other BI launch pad users, but your administrator can edit them.

BI platform allows you to send objects and instances (or shortcuts to objects and instances) to other users via a BI Inbox, an email address, an FTP server, an activity in SAP StreamWork, or a default file location. (Available locations may vary, depending on what your system administrator has enabled.) You send objects from the **Documents** tab when you browse or view a document and send instances from an object's history. To view objects that have been sent to you, on the **Documents** tab, expand the **My Documents** drawer, and click **My Inbox**.

Tip:
Right-click an object's title to access all actions that you can perform on the object. For example, to view the history of an object, right-click the object and select **History**.

Depending on the access rights that your system administrator assigned to you, you may not be able to access some folders and categories. For example, your administrator may disable categories if they are not used in your company.

5.2 Creating and adding new objects in BI launch pad

If you have the necessary rights, you can create objects in and add existing objects to BI launch pad.

Related Topics

• Adding objects to BI launch pad
• To create a hyperlink

- To create a new publication in BI launch pad
- To create a folder or category
- Working with applications in BI launch pad

5.3 Adding objects to BI launch pad

If you have the necessary rights, you can add objects to BI launch pad.

For example, a business analyst has created a report (on how a recent merger affected sales) and needs to share it with the rest of the company. When the business analyst adds the report to BI platform, everyone in the company with the necessary rights can view it.

Related Topics

- Working with applications in BI launch pad

5.3.1 To add a document from your computer to BI launch pad

1. On the **Documents** tab, expand the **Folders** drawer, and locate and select the folder that you want to add a document to.

   The folder's contents appear in the list panel.
2. Click **New** > **Local Document**.

   The "New Local Document in" dialog box appears.
3. Click **Browse** to locate the document to add.
4. Type a title, description, and keywords for the document.
5. If the document is a Crystal report:
   a. To retain the report summary information, click **Use description from report**.
   b. To retain the report's saved data, click **Keep saved data** if you want.
6. (Optional) In the **MIME** box, type the MIME type of the file.
7. (Optional) In the "Categories" area, choose one or more categories to assign the document to.

   Depending on your access rights, you may be unable to add the document to a particular category.
8. Click **Add**.

5.4 Sorting and filtering objects

By default, objects are sorted alphabetically by title, but you can sort and filter objects by other criteria. When you click a column heading, BI platform sorts objects in ascending order. When you click the column heading again, it sorts objects in descending order.

To apply a more complex sort, point to the column heading that you want to sort or filter on. A **funnel** icon ( ) appears beside the column heading name. Click the icon to configure the sort and filter options.

Note:
Depending on the column, the available options may vary.

Related Topics

• To sort or filter objects in the repository

5.4.1 To sort or filter objects in the repository

By default, when you view the contents of a folder or category, BI launch pad displays all objects that you have access rights to view.

Tip:
To remove a filter, click on the column title bar, and select the **Clear Filter** check box. If you filtered your view by object type, click the **funnel** icon, click **All Types**, and click **OK** to remove the filter.

1. On the **Documents** tab, in the list panel, point to a column heading, and click beside the column heading.

   The filter options for the column appear.
2. Configure filter options as needed:
   - To filter by title, in the **Title** column, type the object title in the text box, and click **OK**.
   - To filter by object type, in the **Type** column, select the check box for each object type(s) that you want to view, and click **OK**.
   - To filter by the time when the object last ran, in the **Last Run** column, select the start time and the end time, and click **OK**.
   - To filter by the object creator, in the **Created By** column, select **Everyone** or **Me**, and click **OK**.
   - To filter by the time when the object was created, in the **Created On** column, select the start time and the end time, and click **OK**.

Only the objects you selected appear in the list panel.

Related Topics

- Sorting and filtering objects

5.5 To set the object properties

If you have the necessary access rights, you can change the title, description, keyword, and category properties for an object.

1. On the **Documents** tab, expand the **Folders** drawer, and locate and select the object in the list panel.
2. Click **View** > **Properties**.

   The "Properties" dialog box appears.
3. (Optional) Edit the title, the description, and keywords for the object.
4. Click **Save & Close**.
5. (Optional) Select the object again, and click **More Actions** > **Categories**.
6. Select the categories to which you want to assign the object.
7. Click **OK**.

5.6 To copy an object

You can copy objects and save the copies in folders that you have access rights to. This enables you to edit a new object while keeping the original version of the object.

The **Copy** command copies objects to a clipboard; it does not create a copy of the object in the same folder.

1. On the **Documents** tab, expand the **Folders** drawer, and locate and select the object that you want to copy.

   Tip:
   You can simultaneously copy multiple objects. Hold down the **CTRL** or **SHIFT** key and click objects to select them.
2. Click **Organize** > **Copy**.

   The object is copied to a clipboard.
3. Locate and select the folder where you want to put the copy.
4. Click **Organize** > **Paste**.

Related Topics

- To create a shortcut to an object

5.7 To move an object

1. On the **Documents** tab, expand the **Folders** drawer, and locate and select the object you want to move.
2. Click **Organize** > **Cut**.

   The object is copied to the clipboard. It is not deleted until you paste it in a new location.
3. Locate and select the folder where you want to put the object.
4. Click **Organize** > **Paste**.

The object exists only in the folder where you pasted it. Shortcuts to the object continue to function properly

5.8 To create a shortcut to an object

1. On the **Documents** tab, expand the **Folders** drawer, and locate and select the object that you want to create a shortcut to.
2. Click **Organize** > **Copy Shortcut**.
3. Locate and select the folder where you want to create a shortcut.
4. Click **Organize** > **Paste Shortcut**.

   Tip:
   You can create shortcuts to frequently viewed objects in your `Favorites` folder. Select an object in the list panel, and click **Organize** > **Create Shortcut In My Favorites**.

5.9 To send an object or an instance to a destination

You can send existing objects or instances of an object to a destination, without running an object and creating new instances or refreshing data for a report instance. You send either a copy of or a shortcut to the object or instance, and you select the destination—for example, an FTP server or a BI Inbox. Not all types of objects can be sent to all destinations.

Tip:
If you are viewing an object or instance on a tab, you can send the object or instance from that tab.

1. On the **Documents** tab, locate the object(s) or the instance(s) that you want to send.
2. Select the objects or instances:
   - To send objects, select the object, and click **Send**.

- To send instances, select the object that contains the instance(s), click **More Actions** > **History**, select one or more instances with a status of Success or Failed in the "History" window, and click **Send**.

Instances with a status of Recurring or Pending are scheduled and do not contain data yet.

Tip:
Press **SHIFT** + **click** or **CTRL** + **click** to select multiple objects.

3. Click one of the following options to select a destination:

Option	Description
BI Inbox	Sends the object to a user's BI Inbox
Email	Sends the object to a user's email address
FTP Location	Sends the object to an FTP server location
File Location	Sends the object to a local disk location (your computer)
SAP StreamWork	Sends the object to an activity in SAP StreamWork **Note:** SAP StreamWork features and capabilities are available in BI launch pad, if your administrator has configured BI launch pad to integrate with SAP StreamWork.

The destinations available to you depend on how your system administrator has configured BI platform..

Note:
You must send Web Intelligence documents to BI Inboxes or to an email destination that is configured in BI platform.

4. Accept the Adaptive Job Server's default destination option, or configure a destination option.
5. If you opted to configure a destination option, set the following options:
   - If you selected **BI Inbox** or **Email** as the destination, the users and groups who will receive the object
   - Whether to send a copy of the object or a shortcut that links to the object
   - The name of the object being sent
   - Whether to clean up instances after objects have been sent
   - Settings for the destination type—for example, a directory for the file location or the host name and connection port for the FTP server
6. Click **Submit**.

5.10 To generate an OpenDocument link for an object

OpenDocument links are useful for sending a direct link to a recipient and when you want to save a recipient the inconvenience of navigating folders and categories. When the recipient clicks the link, the BI launch pad logon page opens in a web browser. After the recipient enters valid logon credentials, the document opens.

1. In the list panel on the **Documents** tab, locate and select the document that you want to send to recipients.
2. Click **More Actions** > **Document Link**.

   The "Document Link" dialog box appears.
3. Select the entire OpenDocument link in the **Link** box, and press **CTRL** + **C**.
4. Position the cursor where you want to paste the link (for example, in the body of an email), and press **CTRL** + **V**.

   The link is pasted in the document.
5. Click **OK**.

5.11 To delete an object

You must have the necessary access rights in order to delete objects.

1. On the **Documents** tab, locate and select the object that you want to delete.
2. Click **Organize** > **Delete**.
3. When prompted for confirmation, click **OK**.

5.12 To create a hyperlink

Tip:
You can create a hyperlink in the `My Favorites` folder in the **My Documents** drawer.

1. On the **Documents** tab, expand the **Folders** drawer.
2. Right-click the folder in which you want to create a hyperlink and click **New** > **Hyperlink**.

   The "Hyperlink" dialog box appears.
3. Click **General Properties**.
4. Type a title, a description, and keywords for the hyperlink.
5. Click **URL**, and type the URL of the web page that you want to create a hyperlink to.

   For example, type http://www.sap.com.
6. (Optional) Click **Categories**, choose one or more categories to assign the hyperlink to, and click **OK**.

5.13 Searching in BI launch pad

Matches to search text are based on an object's keyword, title, description, owner information, and content. Your search results appear in the **Search** drawer. You can view results in the **Search** drawer at any time during a BI launch pad session.

5.13.1 Platform search features

Suggestions for alternate spelling

BI platform suggests an alternate spelling for search text when the text was misspelled or produced no results—and the suggested search term will result in successful matches. The alternate spelling is determined by substituting search words with similarly spelled words in BI platform. For example, if you search for “Euroe sales trent”, BI platform recognizes the misspelled words and provides a suggestion of “Europe sales trend”.

Note:
This functionality does not apply to text in Chinese, Japanese, or Korean.

Matched word highlighting

When the search text matches words in an object’s title or description, the matched words appear in bold type.

Facets and search results grouping

Note:
Facet grouping by report field is available only for Crystal reports and Web Intelligence documents.

When a search produces many results, BI platform classifies the result information into “facets” (that is, groups). You can select a facet and view the search results for it. Search results are classified in the following facets:

- Document type
- Public category
- Data in reports
- Aspects of the report content

For example, if you search for “2006 sales by employee”, the public category facet could include “HR Reports”, “Legal Documents”, and “Sales reports” because each category is assigned objects that appear in your search results. Click “Sales report” to view only results assigned to that facet.

Facets are generated from metadata and document content. Content-based facets are based on fields or variables in the documents.

For example, if the variable “Product” is used in many sale reports, the search creates a facet for it. You can refine the search by product name to view only results related to that product.

After refining a search, you can either view the results or further refine the results by selecting options from other facets. The current refinements appear at the top of the search refinement panel.

Note:
Facet grouping by object type may include objects of other types, such as instances. For example, if you view search results under the Crystal report facet, the results may show a Crystal report, a PDF document, and a Word document with the same name. This behavior occurs because the other objects are instances of the Crystal report.

Search result ranking

Each object on the search results page is assigned a score ranging from 1 to 5 bars, based on its relevance to the search text. A score of five bars indicates an object is a strong match, and a score of 1 bar indicates a weak match.

Related Topics

- What the search looks for
- Search techniques

5.13.2 What the search looks for

The following table describes the searchable content for each object type:

Object type	Searchable content
Crystal reports	• Titles • Descriptions • Selection formulas • Saved data • Text fields • Parameter values • Sub-reports
Web Intelligence documents	• Titles • Descriptions • Universe filter names • Saved data • Constants in filter conditions that are defined in a document • Universe measure names • Universe object names • Data in record set • Static text in cells
Microsoft Excel files	• Data • Document properties (title, subject, author, company, category, keywords, and comments) • Header and footer text • Calculation or formula values • Number and date/time values
Word documents	• Text • Document properties (title, subject, author, company, category, keywords, and comments) • Header and footer text • Numerical values
RTF, PDF, PowerPoint, and TXT files	Text
	Metadata

Object type	Searchable content
• Agnostic objects • Analysis views • BI workspaces • Dashboards and Xcelsius objects • Discussions • Events • Flash objects • Hyperlinks • Lifecycle management console jobs • Metadata (from Information Designer) • Modules • Object packages • Profiles • Program objects • Publications • Queries (from Query as a Web Service) • Universes • Widgets • Workspaces (created in SAP BusinessObjects Analysis edition for OLAP)	

5.13.3 Search techniques

Technique	Example	Description
Separate search terms with spaces	finance report	Separating search terms with a space implies an AND separation. This technique produces results when all words in the search text are found in a document.

Technique	Example	Description
Use an asterisk or a question mark as a wildcard character	sales 199* l?st	Do not use a mix of lowercase and uppercase letters in search text. The first example produces search results that contain the word sales and any year from 1990 to 1999. The second example produces results that contain the words last or lost.
Put search text in quotations	"total sales growth"	This technique produces results when the exact phrase is found in a document.
Precede search terms with a plus sign (+)	episode +I	This technique produces results when all words in the search text are found in a document. Precede search terms with a plus sign (+) to search for words that are typically filtered out during a search (for example, a, for, by, is, the).
Precede search terms with a minus sign (-)	Europe sales -revenue	This technique produces results when the word after the minus sign is not found and the remaining search words are found in a document.
Separate search terms with a capitalized OR	bug OR defect count report	This technique produces results when the word before or after OR is found and the remaining search words are found in a document.

Technique	Example	Description
Attribute search	Type:"Crystal Reports" Country:USA	This technique searches for attribute values in metadata or content. To perform an attribute search, type the attribute, a colon, and the value you want to search for. Enclose attribute values comprised of more than one word in quotation marks. The first example produces results with an object type value of Crystal Reports. The second example produces results with a country value of USA.
Combine search techniques	marketing OR sales -finance "increase OR decrease trend"	This example produces results if a document contains the word marketing or the word sales and contains the phrase increase or decrease trend but does not contain the word finance.

5.13.4 To perform a search in BI launch pad

Searches are performed on most objects in BI launch pad, unless the objects have been excluded from search by a user with the necessary access rights.

1. On the **Documents** tab, type the word(s) that you want to locate in the **search** box.

   If you pause while typing, BI launch pad's “quick search” functionality displays the top six matches, based on the text you entered. If matches do not appear immediately, continue typing the search string.

2.  Click **Search**.

   The search results appear in the list panel. The following facets may also appear in the **Search** drawer and provide filtered views of your results:

   - "Location"
   - "Type"
   - "Refresh Time"
   - "Author"

- "Data Source"

  "Data Source" may or may not appear; other facets may appear based on the results content. If a search generates more than five facets, click **More** to view the other facets.

3. Perform either of the following actions to view a search result:
   - In the list panel, double-click an object link.
   - In the **Search** drawer, click a facet to refine the results, and double-click an object link in the list panel.

   When you double-click a Web Intelligence document or a Crystal report, the viewer scrolls to the place in the report where the first match of the search word occurs.

   Note:

   - This feature works only for the HTML viewer.
   - Facet grouping by object type may include objects of other types. For example, if you view search results under the Crystal report facet, the results may show a Crystal report, a PDF document, and a Word document of the same name. This behavior occurs because the other objects are instances of the Crystal report.

Related Topics

• Search techniques
• To view an object

5.14 Folders and categories

Folders and categories that are accessible to all users are typically created by your system administrator. However, if you have the necessary access rights, you can create folders and categories in BI launch pad.

BI platform supports two types of folders:

- `My Favorites`

  You can create any number of folders in `My Favorites` to organize your objects. The folders you create are available when you expand the **My Documents** drawer and click **My Favorites**. You can add objects to your `My Favorites` folders, create shortcuts to or copies of objects in public folders, and create objects.

  You are the only user with access to your `My Favorites` folders in BI launch pad, although administrators can manage them.

- Public folders

  Public folders are created by the administrator or by users who have been granted the necessary access rights. If you have the necessary rights, you can create public folders that contain objects viewable by other users who have the necessary rights. To view public folders, expand the **Folders** drawer.

BI platform supports two types of categories:

- Personal categories

  You can create any number of personal categories to organize your objects. The categories you create are available when you expand the **My Documents** drawer and click **Personal Categories**.

- Corporate categories

  Corporate categories are typically created by the administrator or by users who have been granted the necessary rights. If you have the necessary rights, you can create corporate categories. To view corporate categories, expand the **Categories** drawer.

5.14.1 To create a folder or category

1. On the **Documents** tab, go to the location where you want to create a folder or category:
   - To create a personal folder, expand the **My Documents** drawer, and click **My Favorites**.
   - To create a public folder, expand the **Folders** drawer.
   - To create a personal category, expand the **My Documents** drawer, and click **Personal Categories**.
   - To create a corporate category, expand the **Categories** drawer.
2. Click **New** > **Folder** or **New** > **Category**.
3. When prompted, type a name for the new folder or category.
4. Click **OK**.

5.14.2 To set the properties of a folder or category

You can edit the properties of folders and categories you have created or for which you have access rights. You can change the folder or category name, description, and keyword properties. (You use keywords to search for folders and categories.)

1. On the **Documents** tab, locate the folder or category for which you want to set properties:
   - To edit the properties of a personal folder, expand the **My Documents** drawer, and click **My Favorites**.
   - To edit the properties of a public folder, expand the **Folders** drawer.
   - To edit the properties of a personal category, expand the **My Documents** drawer, and click **Personal Categories**.

- To edit the properties of a corporate category, expand the **Categories** drawer.

2. Select the folder or category, and click **View** > **Properties**.
   The "Properties" dialog box appears.
3. (Optional) Edit the folder name, description, and key words.
4. Click **OK**.

5.14.3 Adding objects to a folder

If you have the necessary access rights, you can add individual objects to a folder and create new objects.

Related Topics

- Creating and adding new objects in BI launch pad

5.14.4 To assign an object to a category

1. Go to the folder that contains the object that you want to assign to a category.
2. Select the object, and click **More Actions** > **Categories**.
   The "Categories" dialog box appears.
3. Choose the categories that you want to assign the object to.

   Tip:
   To expand a category, click the plus sign (**+**) beside the category name.
4. Click **OK**.

Scheduling Objects

6.1 Scheduling objects

You can schedule an object to automatically run it at specified times. When a scheduled object runs successfully, an instance is created.

An instance is a version of the object that contains data from the time the object was run. You can view a list of instances in an object's history. If you have access rights to view objects on demand, you can view and refresh any instance to retrieve the latest data from the data source. Scheduling and viewing instances ensures that objects have the most up-to-date information available for viewing, printing, and distributing.

The default time zone is local to the web server that runs BI platform, not to the CMS to which you connect. Before scheduling objects, confirm that your local time zone is selected in the BI launch pad preferences (header panel > **Preferences**). If you do not have access rights to view or set your preferences, contact your system administrator.

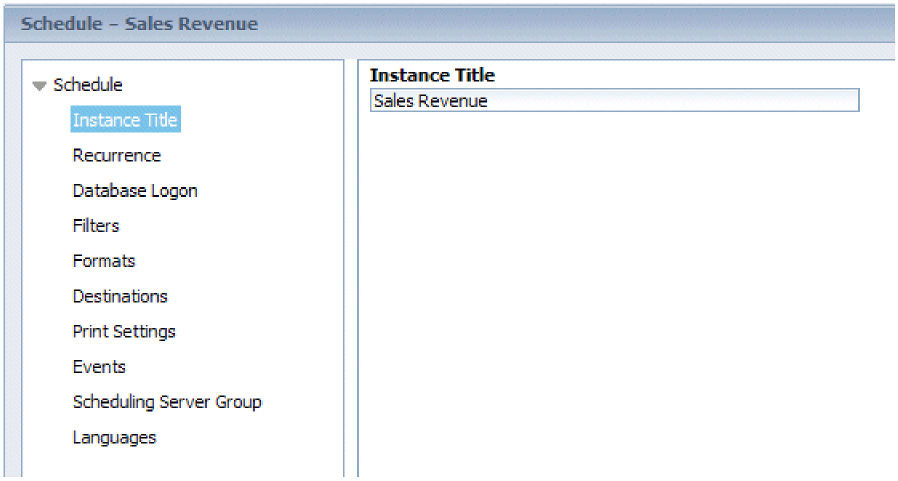
Related Topics

• Setting preferences

6.2 To schedule an object

1. On the **Documents** tab, locate and select the object that you want to schedule.
2. Click **More Actions** > **Schedule**.

   The "Schedule" dialog box appears.



3. Specify the scheduling options that you want to use.

   For some scheduling options, the object settings configured by the administrator are selected in the "Schedule" window. You can use the preconfigured settings or change the settings.
4. Click **Schedule**.

   The "History" window appears, displaying your scheduled job as an instance with a status of Running. The status refreshes every 10 seconds.

   - Instance title: To set a scheduled instance title
   - Recurrence: To choose a recurrence pattern
   - Database logon information: To specify database logon information
   - Parameters or prompts: To schedule an object with parameters or prompts
   - Filters: To apply a record selection formula
   - Formats: To specify an instance format
   - Destinations: To specify a destination
   - Print settings: To set the print settings for a Crystal report
   - Events: To schedule an object with events
   - Server group: To set the scheduling server group settings
   - Languages: "To select languages for report instances"
   - Caching: To select a cache format for Web Intelligence documents

6.2.1 To set a scheduled instance title

1. On the **Documents** tab, locate and select the object for which you want to name a scheduled instance.
2. Click **More Actions** > **Schedule**.

   The "Schedule" dialog box appears.
3. In the navigation panel, click **Instance Title**.

4. In the **Instance Title** box, type a name for the instance.
5. Click **OK**.

6.2.2 To choose a recurrence pattern

Recurrence settings specify a schedule for running an object. Each parameter in the Run object list has its own specific data entry requirements.

You can set how many times the server should attempt to run the job if it fails in the **Number of retries allowed** field. You can also set the amount of time the server should wait before retrying in the **Retry interval in seconds** field.

1. In the "Schedule" dialog box, click **Recurrence**.
2. Choose one of the recurrence options from the **Run object** list and set the required options.

   The following options are available:

   - **Now**

     When you click **Schedule**, the object runs once (immediately).
   - **Once**

     This option requires a start and end time parameter. The object runs once at the time that you specify. If you schedule the object with events, the object will run once if the event is triggered between the start and end times.
   - **Hourly**

     This option requires information in hours and/or minutes for how frequently the object is run. Instances are created regularly to match the parameters that you enter. The first instance is created at the start time that you specify, and the object will cease to run on its hourly schedule at the end time that you specify.
   - **Daily**

     This option requires a start and end time parameter. The object runs once every N days at the time that you specify. It will not be run after the end time that you specify.
   - **Weekly**

     This option requires a start and end time parameter. Each week, the object runs on the selected days at the time that you specify. It will not be run after the end time that you specify.
   - **Monthly**

     This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N months. It will not be run after the end time that you specify.
   - **Nth Day of Month**

This option requires a day of the month on which the object is run. Instances are created regularly each month on the day that you enter at the start time that you specify. The object will not be run after the end time that you specify.

- **1st Monday of Month**

  This option requires a start and end time parameter. An instance is created on the first Monday of each month at the time that you specify. The object will not be run after the end time that you specify.

- **Last Day of Month**

  This option requires a start and end time parameter. An instance is created on the last day of each month at the time that you specify. The object will not be run after the end time that you specify.

- **X Day of Nth Week of the Month**

  This option requires a start and end time parameter. An instance is created monthly on a day of a week that you specify. The object will not be run after the end time that you specify.

- **Calendar**

  This option allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the Bi platform administrator.) An instance is created on each day that is indicated in the calendar, beginning at the start time that you specify and continuing until the end time that you specify.

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

6.2.3 To specify database logon information

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

1. In the "Schedule" dialog box, click **Database Logon**.
2. If necessary, change the logon information for the object's data source.
3. Set any other scheduling parameters as required, and then click **Schedule**.

6.2.4 To specify an instance format

Depending on the type of object that you choose to schedule, you can select the format in which the object's instance is saved when it is generated by BI platform.

1. In the "Schedule" dialog box, click **Format** or **Formats and Destinations**.
2. Select the format you want to schedule to.

For example, for a Crystal report, select the format from the **Format Options for Selected Document** list.

3. Select additional formatting options as required.

   Some Crystal report format options require you to specify additional formatting options. These options vary depending on the format that you selected.

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

Related Topics

• Additional formatting options for Crystal reports

6.2.4.1 Available formats

The following are the formats to which specific object types can be sent or scheduled.

Crystal report formats

For Crystal reports, you can select from the following formats:

- SAP Crystal Reports
- SAP Crystal Reports read only (RPTR)
- Microsoft Excel (97-2003)
- Microsoft Excel (97-2003) (Data Only)
- Microsoft Excel (2007) (Data Only)
- Microsoft Word (97-2003)
- PDF
- Rich Text Format (RTF)
- Microsoft Word — Editable (RTF)
- Plain Text
- Paginated Text
- Tab Separated Text (TTX)
- Separated Values (CSV)
- XML

Note:

- When you select a file format other than SAP Crystal Reports, the program preserves as much of the formatting as the export format allows. However, you may lose some or all of the formatting that appears in the report.
- The difference between Excel and Excel (Data only) is that the Excel option preserves the look and feel of your original report, while the Excel (Data only) focuses on preserving data and does not merge cells.

- The Tab Separated Text format places a tab character between values and attempts to preserve the formatting of the report; the Separated Values format places a specified character between values and does not attempt to preserve formatting.
- The Microsoft Word (97-2003) format maintains as much formatting as possible, including graphics. Each object appears in an individual text field. Microsoft Word — Editable format does not preserve as much formatting; text is displayed in lines and images are placed in line with the text. Rich Text Format is similar to Microsoft Word (97-2003).

For more information about the options you must set to schedule a Crystal report to a specific format, see Additional formatting options for Crystal reports and the section on Exporting in the *SAP Crystal Reports User Guide*.

Publications formats

For more information about available publication formats, see Available formats.

Web Intelligence document formats

For Web Intelligence documents, you can select from the following formats:

- Web Intelligence
- Microsoft Excel
- PDF

6.2.4.2 Additional formatting options for Crystal reports

When you schedule a Crystal report to some formats, you may need to set additional options. The following tables describe the additional options for each format.

Table 6-1: Microsoft Excel (97-2003)

Option	Description
Page Range	• To include all pages in a report, click **All**. • To include a page range, click **Pages from**, type the first page you want to include, and type the last page you want to include in the **to** box.
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.

Option	Description
Set Column Width	• To set the width of Excel columns based on objects in a report, click **Column width based on objects in the** and choose a report area from which to take the column width. • To set a constant column width, click **Constant column width (in points)** and type the width.
Export page header and page footer	• To indicate how to print page headers and footers in an instance, click **Once Per Report** or **On Each Page**. • To exclude page headers and footers from an instance, click **None**.
Create page breaks for each page	Click to create a page break after each page in a report
Convert date values to strings	Click to export date values in a report as text strings
Show gridlines	Click to view gridlines in the exported document

Table 6-2: Microsoft Excel (97-2003, 2007) (Data Only) and Microsoft Excel Workbook (Data Only)

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
Set Column Width	• To set the width of Excel columns based on objects in a report, click **Column width based on objects in the** and choose a report area from which to take the column width. • To set a constant column width, click **Constant column width (in points)** and type the width.
Export object formatting	Click to preserve the object formatting
Export images	Click to export the images in a report

Option	Description
Use worksheet functions for summaries	Click to use summaries in a report to create worksheet functions in Excel
Maintain relative object position	Click to maintain the position of objects, relative to one another
Maintain column alignment	Click to preserve the alignment of text in columns of a report
Export page header and page footer	Click to include the header and footer in an instance
Simplify page headers	Click to simplify page headers
Show group outlines	Click to show group outlines

Table 6-3: Microsoft Word (97-2003)

Option	Description
Page Range	• To include all pages in a report, click **All**. • To include a page range, click **Pages from**, type the first page you want to include, and type the last page you want to include in the **to** box.

Table 6-4: PDF

Option	Description
Page Range	• To include all pages in a report, click **All**. • To include a page range, click **from**, type the first page you want to include, and type the last page you want to include in the **to** box.

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
Create bookmarks from group tree	Click to create bookmarks in a PDF file based, on the tree structure of the report. This makes reports easier to navigate.

Table 6-5: Rich Text Format (RTF)

Option	Description
Page Range	• To include all pages in a report, click **All**. • To include a page range, click **Pages from**, type the first page you want to include, and type the last page you want to include in the **to** box.

Table 6-6: Microsoft Word - Editable (RTF)

Option	Description
Page Range	• To include all pages in a report, click **All**. • To include a page range, click **from**, type the first page you want to include, and type the last page you want to include in the **to** box.
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
Insert page break after each report page	Click to insert page breaks after each page of the report.

Table 6-7: Plain Text

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.

Option	Description
Number of characters per inch	Type a value between 8 and 16 to indicate the number of characters to include per inch. This setting determines how text files appear and are formatted.

Table 6-8: Paginated Text

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
Number of Lines per Page	Type the number of lines of text to include between page breaks.
Number of Characters per inch	Type a value between 8 and 16 to indicate the number of characters to include per inch. This setting determines how text files appear and are formatted.

Table 6-9: Separated Values (CSV)

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
Delimiter	Type the character to use as the delimiter.
Separator	Type the character to use to separate values, or click **Tab**.
Mode	Click **standard** or **legacy** mode. In **standard** mode, you can choose report, page, and group sections to include in an instance. In **legacy** mode, you cannot set the report, page, and group section options.
Report and page sections	If you selected **standard** mode, indicate whether to export report and page sections. If yes, indicate whether to isolate the sections.

Option	Description
Group sections	If you selected **standard** mode, indicate whether to export group sections. If yes, indicate whether to isolate the sections.

Table 6-10: XML

Option	Description
Use the export options defined in the report	Click to use the export options defined in a report. You cannot set any other formatting options.
XML Exporting formats	Choose an XML export format.

6.2.5 To specify a destination

You can schedule an object instance to be sent to a specific destination on your computer, on a network, a default file location, email, FTP, or SAP StreamWork (if integration with BI launch pad has been configured). Available destinations depend on which destinations have been enabled by your system administrator and which user rights you have.

If your administrator has specified a particular destination for the object, this destination option is 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.

1. In the "Schedule" dialog box, view your destination options.
   For example, for a Crystal report, click **Destinations**.
2. Select your destination.
   For example, for a Crystal report, choose a destination from the **Destination** list.
3. Select **Keep an instance in the history** if you want to save a copy of the instance.
4. Select **Use the Job Server's defaults** if you want to use the default settings for that location.
5. Set other scheduling parameters as required, and then click **Schedule**.

Related Topics

• Destination options
• Available formats

6.2.5.1 Destination locations

You can schedule, send, or publish objects and publications in BI platform to the following destination locations:

- **Default Enterprise Location**

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

- **BI Inbox**

  This option saves the instance to the Output File Repository Server and to BI Inboxes as specified:

  - If you select the **Use the Job Server's defaults** option, copies of the instance are saved to the BI Inboxes that are configured on the job server.
  - If you do not select **Use the Job Server's defaults** option, you can specify the BI Inboxes where you want to save the instance.

- **Email**

  This option saves the instance to the Output File Repository Server and to the specified email recipients:

  - If you select the **Use the Job Server's defaults** option, copies of the instance are emailed to the email recipients that are configured on the job server.
  - If you do not select the **Use the Job Server's defaults** option, you can specify the recipients to whom you want to email copies of the instance.

- **FTP Server**

  This option saves the instance to the Output File Repository Server and to the specified FTP server:

  - If you select the **Use the Job Server's defaults** option, a copy of the instance is saved to the FTP server that configured on the job server.
  - If you do not select the **Use the Job Server's defaults** option, you can specify the FTP server where you want to save the instance.

- **File System**

  This option saves the instance to the Output File Repository Server and to the specified file location:

  - If you select the **Use the Job Server's defaults** option, copies of the instance are saved to the unmanaged disk location that is configured on the job server.
  - If you do not select **Use the Job Server's defaults** option, a copy of the instance is saved to the file location that you specify.

Note:
If you select any option other than "Default Enterprise Location" and choose to use the job server's default option, then the location must already be configured on the appropriate job server by your administrator. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide* available on the SAP Help Portal at http://help.sap.com.

6.2.5.2 Destination options

There are several options you can select for scheduling an object to a destination such as the names of users who should receive the instance in their BI Inboxes, the addresses of email recipients or an FTP server to which you want the instance uploaded. The destination options will differ depending on the destination you choose: BI Inbox, the file system, an FTP server, or email.

Note:
To use these destinations, they must be configured on the servers that run scheduling jobs. To find out if these destinations are configured on your deployment, contact your BI platform administrator.

Table 6-11: BI Inbox

Option	Description
Selected Recipients	Select a user or a group from the **Available recipients** list, and click **>** to add the user or the group to the **Selected recipients** list.
Target Name	• If you want BI platform to generate a name for the instance, select **Use Automatically Generated Name**. • To use a specific file name, select **Use Specific Name** and type a name in the box. **Tip:** For specific file names, select variables for the name from the list beside the box. The variable is added to the text in the box. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
Send As	• To send a shortcut to the instance to your recipients, select **Shortcut**. • To send a copy of the instance to your recipients, select **Copy**.

Table 6-12: File System

Option	Description
Directory	Type the path to the directory you would like to send the instance to.
File Name	• To let BI platform generate a name for the instance, select **Use Automatically Generated Name**. • To use a specific file name, select **Use Specific Name**, and type a name in the box. **Tip:** For specific file names, select variables for the name from the list beside the box. The variable is added to the text in the box. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
User name	Type the user name required to access the file location.
Password	Type the password required to access the file location.

Table 6-13: FTP Server

Option	Description
Host	Type the FTP server.
Port	Type the port used to access FTP. The default port number is 21.
User Name	Type the user name required to access the FTP server.
Password	Type the password required to access the FTP server.
Account	Type the account required to access the FTP server, if applicable.
Directory	Enter the path to the directory you would like to send the instance to.

Option	Description
File Name	• To let BI platform generate a name for the instance, select **Use Automatically Generated Name**. • To use a specific file name, select **Use Specific Name**, and type a name in the box. **Tip:** For specific file names, select variables for the name from the list beside the box. The variable is added to the text in the box. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.

Table 6-14: Email recipients

Option	Description
From	Type a return email address. **Note:** This box may be unavailable depending on your system configuration. **Tip:** Select variables for the **From** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
To	Type each email address to which you would like to send the instance. Separate multiple email addresses with semicolons. **Tip:** Select variables for the **To** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
Cc	Type the email addresses to send copies of the instance. Separate multiple email addresses with semicolons. **Tip:** Select variables for the **Cc** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.

Option	Description
Bcc	Type the email address for undisclosed recipients. Separate multiple email addresses with semicolons. **Tip:** Select variables for the **Bcc** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
Subject	Type the subject line. **Tip:** Select variables for the **Subject** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
Message	Type the message that will appear in the body of the email. **Tip:** Select variables for the **Message** box from the **Add placeholder** list. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.
Deliver Document(s) As Attachment	Select this check box to add the instance to the email as an attachment. Additionally, you can specify the attachment name: • To use a system-generated name, select **Use Automatically Generated Name**. • To type or select a custom name, select **Use Specific Name**, and type a name in the box. **Note:** For specific file names, select variables to include in the name from the list beside the box. The variable is added to the text in the box. Available variables include the object's title, ID, owner, the date and time, your email address, and your name.

6.2.6 To apply a record selection formula

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

1. In the "Schedule" dialog box, click **Filters**.
2. Change the record or group selection formula as necessary.
3. Set other scheduling parameters as required, and then click **Schedule**.

6.2.7 To set the print settings for a Crystal report

When you schedule a Crystal report, you can choose to print the object instance once it has been generated.

1. In the "Schedule" dialog box, click **Print Settings**.
2. Select a print mode for your web viewer.
   - If you want to print the report in PDF format, click **Always print to PDF (Preview)**.
   - If you want to use the report's print settings, click **Follow Crystal Reports preference setting**.
3. If you want to print the report when it is run, select the **Print Crystal reports when scheduling** check box and do the following:
   a. Select **Default printer** to use your default printer, or select **Specify the printer** and provide the appropriate printer information accordingly.
   b. Type the number of copies you want to print in the **Number of Copies** field.
   c. Under "Page Range", select **All** if you want to print all pages of the report, or select **Pages** and type the first and last of the pages you want to print.
   d. Select whether or not you want to collate the printed copies of the instance from the **Set collate option to** list.
   e. Indicate your scaling preferences in the **Page Scaling** list.
   f. If you want to center each page, select **Center the page**.
   g. If you want to force horizontal pages to fit the paper, select **Fit horizontal pages into one page**.
4. Under "Specify page layout", indicate the layout you want to use:
   - If you select **Specify printer settings**, indicate the printer settings you want to use.
   - If you select **Custom settings**, indicate whether you would like to use standard layout settings or custom layout settings. For custom layout settings, indicate the orientation and paper size you want to use.
5. Set other scheduling parameters as required, and then click **Schedule**.

6.2.8 To schedule an object with parameters or prompts

Parameters prompt the user to enter information. In report objects, this information may determine what data appears in the report. For example, in a report that is used by sales, there may be a parameter that asks the user to choose a region. When the user chooses a region, the report displays only the results for that specific region.

Note:
In Web Intelligence documents, parameters are called prompts.

You can set parameters in the "Schedule" dialog box. If the object that you schedule does not contain parameters, then the **Prompts** option does not appear.

1. In the "Schedule" dialog box, click **Prompts**.

   Note:
   The appearance of the parameter options in the "Schedule" dialog box may differ from object to object, depending on how the parameter field was created. Program objects may provide an **Argument** field instead.

2. Change the parameter value as necessary.

   For Crystal reports, click the value of a parameter to change it. For Web Intelligence documents, click **Modify** to edit prompt values.

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

6.2.9 To schedule an object with events

Event-based scheduling provides you with additional control when you schedule objects: you can configure the system so that objects are run only after a specified event occurs. Working with events consists of two steps: creating an event and scheduling an object. That is, once you create an event, you can select it as a dependency when you schedule an object. The scheduled job is then processed only when that event occurs.

You create events in the Central Management Console (CMC), and then select the events in BI launch pad when you schedule objects. For more information about creating events and the CMC, see the *SAP BusinessObjects Business Intelligence Platform User Guide* available on the SAP Help Portal at http://help.sap.com.

1. In the "Schedule" dialog box, click **Events**.
2. To specify an event that will trigger the scheduled object, select the event in the **Available Events** list and click **>** to move it to the **Events to wait for** list.
3. To specify an event that will be triggered on the completion of this scheduling job, select the schedule event in the **Available Schedule Events** list, and then click **>** to move it to the **Events to trigger on completion** list.
4. Set other scheduling options as required and click **Schedule**.

   For more information on scheduling with events, see the “Scheduling Objects” chapter in the *SAP BusinessObjects Business Intelligence Platform User Guide*.

6.2.10 To set the scheduling server group settings

When you schedule an object, you can select the server group that the system uses to run the object.

1. In the "Schedule" dialog box, click **Scheduling Server Group**.
2. Select the scheduling server group option you want:
   - **Use the first available server**

     This is the default option. BI platform uses 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 attempts to process the object from the servers that are found within your server group. If the specified servers are not available, then the object is processed on the next available server.
   - **Only use servers belonging to the selected group**

     This option ensures that BI platform uses only 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 is not processed.
3. If your deployment of BI platform uses federation and you want to run the object at the site on which the object is located, select **Run at origin site**.
4. Set other scheduling parameters as required, and then click **Schedule**.

6.2.11 To select a cache format for Web Intelligence documents

Note:
To select a cache option, the output format you specified for the object must be **Web Intelligence**. If you select a different format, the cache options you specify will have no effect.

When the system runs a scheduled Web Intelligence document, an instance is generated and stored on the Output File Repository Server. You can also cache the report on the appropriate Report Server by selecting a cache format for the document. If you don't select a cache format, the system won't cache the document.

1. In the "Schedule" dialog box, click **Caching**.
2. Select the format you want to pre-load the cache with.
3. Select the locales with which to pre-load the cache.

   When you schedule the document, BI platform generates cached versions of the document in the locale(s) that you specify.

4. Set the rest of your scheduling options and click **Schedule**.

6.2.12 To select languages for report instances

Note:
This task applies to Crystal reports only.

Perform this task if you want to generate report instances in different languages.

1. In the "Schedule" dialog box, click **Languages**.
2. Select a language option.
   - **Schedule the report in Preferred Viewing Locale**

     This option schedules the report according to the preferred viewing locale you set in your preferences, and creates instances using that locale only.
   - **Schedule the report in Multiple Locales**

     This option schedules the report in multiple languages. If you choose this option, you must also select locales by moving them from the **All Locales** list to the **Selected Instance Locales** list.
3. Set other scheduling parameters as required, and click **Schedule**.

6.3 Pausing or resuming an instance

You can pause and resume an object's instance as needed. For example, if a Job Server is down for maintenance reasons, you pause a scheduled instance to prevent the system from running the object, because scheduling jobs fail when the Job Server is not running. When the Job Server is running again, you can resume the scheduled object.

Note:
Pause and resume can be applied only to scheduled instances; that is, they can be applied only to objects that have a status of Pending or Recurring.

6.3.1 To pause an instance

1. Locate and select the object.
2. Click **More Actions** > **History**.

   The "History" window appears.

3. Select the scheduled instance that you want to pause.
4. Click **Pause**.

6.3.2 To resume an instance after pausing it

1. Locate and select the object.
2. Click **More Actions** > **History**.

   The "History" window appears.
3. Select the paused instance that you want to resume.
4. Click **Resume**.

6.4 Scheduling an object package

An object package is a type of object that acts as a container for other objects or components. They can only be created or edited in the CMC, and can contain any object type that can be scheduled. To add objects to an object package, a user with the necessary access rights must copy the object and paste it into the object package in the CMC. Objects in an object package are then distinct from the object they were copied from and are instead components of the object package. When you schedule an object package, instances are created for each component, allowing you to schedule several objects simultaneously. You cannot schedule a component of an object package on its own.

Scheduling an object package is slightly different from scheduling an individual object, because some scheduling options must be set on an object package level. These scheduling options are recurrence, destinations, events, and server group settings. Other scheduling options are set for each component of the object package. These scheduling options are notification, database logon settings, filters (if applicable), format, print settings, and parameters, prompts, or arguments (if applicable).

6.4.1 To schedule an object package

1. Select the object package, click **Actions**, and choose **Schedule**.
2. Set the instance title, recurrence, destination, events, and sever group settings as you would for any object.

   For more information on these settings, see the following topics:
   - To set a scheduled instance title
   - To choose a recurrence pattern

- To specify a destination
- To schedule an object with events
- To set the scheduling server group settings

3. Click **Components**.
4. Click on the name of each component to set the notification, database logon, filters, format, print, cache, and parameters / prompts settings as applicable to each component.

   For more information on these settings, see the following topics:

   - To specify database logon information
   - To apply a record selection formula
   - To specify an instance format
   - To set the print settings for a Crystal report
   - To select a cache format for Web Intelligence documents
   - To schedule an object with parameters or prompts

   When you have finished setting the scheduling parameters for a component, click **Save & Close** to return to the scheduling page for the object package and set the remaining scheduling parameters.

6.5 Working with instances

6.5.1 To view the latest instance of an object

You can view the instances of objects such as Crystal reports, Web Intelligence documents, publications, and object packages.

1. Navigate to the object and select it.
2. Click **View** > **View Latest Instance**.

   The latest instance of the object appears in its associated viewer.

   If you have the necessary rights , you can click **Refresh** in the report/document viewer toolbar to refresh the report/document with the latest data from its data source.

Related Topics

- Viewing objects

6.5.2 Viewing historical instances

BI platform saves a history of object instances for scheduled objects that have been run. History information is arranged chronologically (with the most recent instances listed first) and can contain the following information:

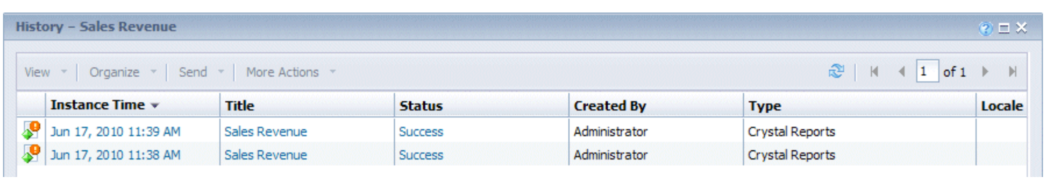
- Instance Time
- Title
- Status
- Created By
- Type
- Locale
- Parameters

Note:
The information that is available depends on the type of object that you are viewing.

6.5.2.1 To view the history of an object

1. Navigate to the object and select it.
2. Click **More Actions** > **History**.

   The "History" window appears.



3. Double-click a link in the **Instance Time** column to view an object instance.

   Tip:
   Click the **funnel** icon beside **Instance Time**, **Title**, **Status**, or **Created By** to sort and display instances according to different criteria. The icon appears when you point to a column header.

6.5.3 To empty your BI Inbox

Perform this task to delete all instances from your BI Inbox.

1. In the Documents tab, expand the **My Documents** drawer and click the **Inbox** node.
   The contents of your BI Inbox appear in the List panel.
2. Click **Organize** > **Delete All Messages**.
3. When prompted for confirmation, click **OK**.

Working with StreamWork

7.1 Working with SAP StreamWork

SAP StreamWork brings collaborative decision-making and social media features to BI launch pad. You can monitor the SAP StreamWork feed directly from your **Home** tab. You can send Crystal reports and Web Intelligence documents to SAP StreamWork activities. You can view a feed of posted comments for public documents and participate in online discussion.

Note:
SAP StreamWork features and capabilities are available in BI launch pad if your administrator has configured BI launch pad to integrate with SAP StreamWork. Additional configuration is needed to display the SAP StreamWork feed in your **Home** tab. For information, contact your BI administrator.

Document feeds

For documents you have access rights to view, you can participate in online discussion and see comments posted by SAP StreamWork users.

Send and schedule BI content to SAP StreamWork

When you use the **Send** and **Schedule** commands, you can choose SAP StreamWork as a destination.

Monitoring the SAP StreamWork feed

You can monitor the SAP StreamWork feed from your **Home** tab in BI launch pad, if your BI administrator has configured a custom home tab for SAP StreamWork. Customized home tabs are set up in BI workspaces. You can use BI launch pad's **Preferences** menu to replace the default **Home** tab.

For more information on SAP StreamWork, go to the "Help" page for documentation, tutorials, and a user forum, at http://www.sapstreamwork.com/help#tutorials.

7.1.1 Working with the feeds

Monitoring feeds

You can monitor SAP StreamWork feeds directly from your home tab in BI launch pad, if your BI administrator added SAP StreamWork to a custom home tab.

Note:
Customized home tabs are set up using BI workspaces. You can use BI launch pad's **Preferences** menu to replace the default **Home** tab. Contact your administrator for details.

How to use this module

Check for new comments about document feeds you follow. Monitor updates to your SAP StreamWork activities and people you follow in. Reply to posts by selecting **Comment** and entering a response. Post your own news or start a discussion thread by entering text in **Say Something**.

For more information SAP StreamWork feeds, view the tutorials and help available at http://www.sapstreamwork.com/help#tutorials

7.1.2 Working with document feeds

Use document feeds to monitor and respond to comments posted by other BI launch pad users about public documents that you have access rights to. You can participate in discussions about reports and documents you care about, read about news and updates, and stay connected with the community of BI launch pad users.

You can check whether comments have been posted in the feed panel for a public document in the Document tab by looking at the icon in the **SAP StreamWork** column. Different icons are displayed to indicate:

- That you are following the document feed.
- That no comments have been posted.
- That one or more comments have been posted.

Note:
In your general preferences, you must have **SAP StreamWork / Discussion Status** selected under "Choose columns displayed in Documents tab" for the **SAP StreamWork** column to be displayed.

Prerequisites

In order to access document feeds, you need the following:

- Access rights to the document.
- A license for SAP StreamWork.
- BI launch pad configured to integrate with SAP StreamWork.

Contact your system administrator to learn more.

To access feeds for a document

Click on a document and select **Details** on the toolbar. On the Details panel, click the **SAP StreamWork** tab.

Note:
The first time you access any feed, you will be prompted for your SAP StreamWork logon credentials. The first time you view the feed for a specific document, no comments appear. In order to view comments, you need to follow the feed.

To follow a document feed

- Select a document and click **More Actions > Follow**.

To post a message

- Type a message inside **Say Something** and click **Post**.

Posts and replies are not private. Any BI launch pad user who has rights to view the document, has an SAP StreamWork license, and has BI launch pad configured to integrate with SAP StreamWork can see your post.

7.1.2.1 To send or schedule documents to SAP StreamWork

You can send and schedule content to SAP StreamWork, such as Crystal reports, Web Intelligence documents, or PDF files, if your administrator has configured BI launch pad to integrate with SAP StreamWork, and you have an SAP StreamWork license.

Follow these steps to send a document to SAP StreamWork:

1. Select the document or instance you want to send.
2. Click **Send > SAP StreamWork**.

   The first time you choose this option, the SAP StreamWork login page appears. The next time you choose this command, the "Send to SAP StreamWork" dialog box appears.
3. Log on to SAP StreamWork.

   Your account is authenticated.
4. Choose a worklist or select **All Activities**.

   By default, all activities are displayed.
5. Choose an existing activity or select **New Activity** (selected by default).

   The activity determines the destination in SAP StreamWork where your document appears. If you choose **New Activity**:
   a. Enter an activity name.
   b. As an option, enter an activity objective. This objective will appear in the **About** field in SAP StreamWork.
   c. Enter an item description. This is a comment about the document you are sending.
   d. Select an activity type.
6. (Optional) Enter the email addresses of users you want to invite to your activity. In the **Add Participants** box, type one or more email addresses separated by a comma.

   SAP StreamWork sends an invitation via email to every user whose email address you enter.

7. Click **Send**.

   The "Summary" dialog box appears.

8. Click the link provided in the "Summary" dialog box to take you to SAP StreamWork.

   Note:
   The link will take you to your home page in SAP StreamWork, where you can then navigate to the newly created activity. The new activity may take several minutes to appear depending on the server load.

In SAP StreamWork, the "Activity" page appears showing the document icon; in order to launch the document, you may need a viewer. To navigate back to BI launch pad, use the OpenDocument link.

Note:
The same options for setting the SAP StreamWork destination when scheduling a document are available as when using the **Send** command. In addition, you can save a scheduled instance by selecting **Keep an instance in the history**.

Using Discussions

8.1 Discussions

Discussions provide a way to post notes for other BI platform users about reports, hyperlinks, programs, and BI platform objects. For any object you can access, you can add notes or create a discussion thread (related notes organized in a hierarchy). Users who have rights can view your notes and add comments to a discussion thread.

Note:
Before you can use Discussions, your system administrator must enable Discussions for BI launch pad and assign view rights on an object and associated notes. Contact your system administrator for more details.

SAP StreamWork social media

You can post comments and participate in online discussions with SAP StreamWork users within BI launch pad if your administrator has configured BI platform to integrate with SAP StreamWork. For more information, refer to "SAP StreamWork Feed".

8.1.1 To open Discussions

The Discussions notes and threads for each object are located in the Details panel for the object.

1. Go to the Documents tab and select an object in the List panel.
2. Click **Details**.
   The Details panel opens on the right side of the Documents tab.
3. Expand the **Discussions** drawer.
   All notes and threads that are related to the object you selected are displayed.

8.1.2 To add a note

You can add notes to an object if you have view rights for it.

1. Open Discussions.
2. Click "New Message".
3. In the **Subject** field, enter a heading for your note.

   The maximum number of characters that you can use in this field is 255.
4. In the **Message** field, enter your note's message.

   The maximum number of characters that you can use in this field is 1,000.
5. Click "High Importance" or "Low Importance" to flag the importance of your note if necessary.
6. Click **Post**.

Related Topics

- To open Discussions

8.1.3 To edit a note

You can edit a note after you create it.

1. Open Discussions.
2. Select the note you want to edit.
3. Edit the text in the **Subject** and **Message** fields accordingly.
4. Click **Post**.

   Note:
   You cannot edit notes that were created by other users or notes that have replies in a discussion thread unless you have administrative rights.

Related Topics

- To open Discussions

8.1.4 To reply to a note

1. Open Discussions.
2. Select the note that you want to reply to.

   You can click the plus symbol (+) to expand the levels of notes that are related to the object. You can post a reply to an entire group, or to the person who posted the note. Notes that you have not yet read appear in bold.

3. Click "Reply to Group" or "Reply to Sender".

   If you choose "Reply to Group", your reply is visible to everyone who has the right to view the notes associated with the object.

4. Edit the contents of the **Subject** and **Message** fields.
5. Click **Post**.

Related Topics

- To open Discussions

8.1.5 To delete a note

You can delete the notes after you create them.

1. Open Discussions.
2. Select the note you want to delete.
3. Click "Delete".

   Note:

   You cannot delete notes created by other users or notes containing replies to a discussion thread unless you have administrative rights.

Related Topics

- To open Discussions

Publishing

9.1 About Publishing

Publishing makes documents, such as Crystal reports and Web Intelligence documents, available automatically via email or FTP server, saved to disk, and managed through BI platform (for web viewing, archiving, retrieval, and scheduling). In BI launch pad or the CMC, you can tailor documents for different users or recipients, schedule the documents to run at intervals, and send the documents to a multiple destinations, including BI Inboxes and email addresses.

9.2 What is a publication?

A “publication” is a collection of documents intended for distribution to a mass audience. Before the documents are distributed, the publisher defines the publication using a collection of metadata. This metadata includes the publication source, its recipients, and the personalization applied.

Publications can help you send information through your organization more efficiently:

- They allow you to easily distribute information to individuals or groups of users and personalize the information each user or group receives.
- They provide delivery of targeted business information to groups or individuals through a password-protected portal, across an intranet, an extranet, or the Internet.
- They minimize database access by eliminating the need for users to send process requests themselves.

You can create different types of publications based on Crystal reports or Web Intelligence documents.

9.3 Publication concepts

9.3.1 Report bursting

During Publishing, the data in documents is refreshed against data sources and personalized before the publication is delivered to recipients. This combined process is known as “report bursting”. Depending on the size of the publication and how many recipients it is intended for, you have several report bursting methods to choose from:

- **One database fetch for all recipients**

  When you use this report bursting method, all documents in the publication are refreshed once, and then the documents are personalized and delivered to each recipient. This report bursting method uses the data source logon credentials of the publisher to refresh data.

  This is the default option for Web Intelligence document publications. It is also the recommended option if you want to minimize the impact of Publishing on your database. This option is secure only when the source documents are delivered as static documents. For example, a recipient who receives an Web Intelligence document in its original format can modify the document and view the data associated with other recipients. However, if the document is delivered as a PDF, the data would be secure.

  Note:

  - This option is secure for most Crystal reports regardless of whether the Crystal reports are delivered in their original format.
  - The performance of this option varies depending on the number of recipients.

- **One database fetch for each batch of recipients**

  When you use this report bursting method, the publication is refreshed, personalized, and delivered to recipients in batches. This report bursting method uses the data source logon credentials of the publisher to refresh data. The batches are based on the personalization values you specified for the recipients. The batch size varies depending on the specified personalization value and is non-configurable.

  This is the default option for Crystal report publications. It is also the recommended option for high-volume scenarios. With this option, you can process batches concurrently on different servers, which can greatly decrease the processing load and time required for large publications.

  Note:
  This option is unavailable for Web Intelligence documents.

- **One database fetch per recipient**

  The data in a document is refreshed for every recipient. For example, if there are five recipients for a publication, the publication is refreshed five times. This report bursting method uses the data source logon credentials of the recipient to refresh data.

  This option is recommended if you want to maximize security for delivered publications.

Note:
Crystal reports that are based on universes or Business Views support **One database fetch per recipient** only to maximize security.

Related Topics
- To specify a report bursting method

9.3.2 Delivery rules

Note:
This feature is unavailable for Web Intelligence documents.

“Delivery rules” affect how documents in publications are processed and distributed. When you set delivery rules on documents, you indicate that the publication will be delivered to recipients only if the content in the documents meets certain conditions. There are two types of delivery rules:

- Recipient delivery rule

  If the data in the recipient's instance meets the delivery rule, the instance is delivered to the recipient.
- Global delivery rule

  If the data in a designated document meets the delivery rule, the publication is delivered to all recipients.

  Note:
  The designated document for a global delivery rule can be different from the document or documents used in a publication. For example, you can set a global delivery rule on a document used as a dynamic recipient source instead of a document in the publication.

If a publication has recipient and global delivery rules, the global delivery rule is evaluated first to determine whether the publication will be processed. If the publication meets the global delivery rule, the system then evaluates the recipient delivery rules to determine which instances to process and distribute for each recipient.

How you set delivery rules depends on the document type that you want to publish. For Crystal reports, you specify a delivery rule based on a named alert that the report designer creates in the Crystal report. You can also set a delivery rule based on whether the personalized publication contains any data.

The diagram “Global delivery rule met” illustrates how an alert-based global delivery rule works. Here the global delivery rule is set on a document in the publication. The Crystal report has a Revenue alert for values greater than 100,000. The publisher creates a global delivery rule based on the Revenue alert so that the Crystal report is only delivered to all recipients if revenue exceeds 100,000. In this case the delivery rule is met, so the Crystal report is delivered.

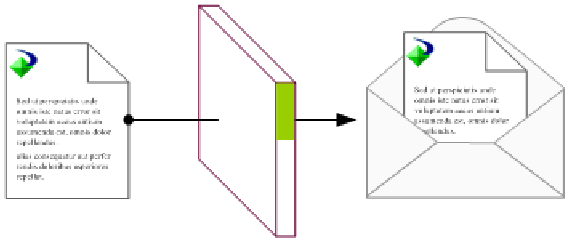


Figure 9-1: Global delivery rule met

The diagram “Recipient delivery rule unmet” illustrates how a recipient delivery rule works. The publisher sets a recipient delivery rule for the Crystal report so that the report is delivered to recipients only if the report contains data for that recipient. When the report is personalized for each recipient, Green Recipient does not have data in the Crystal report. This means that only Blue Recipient and Orange Recipient receive the publication.

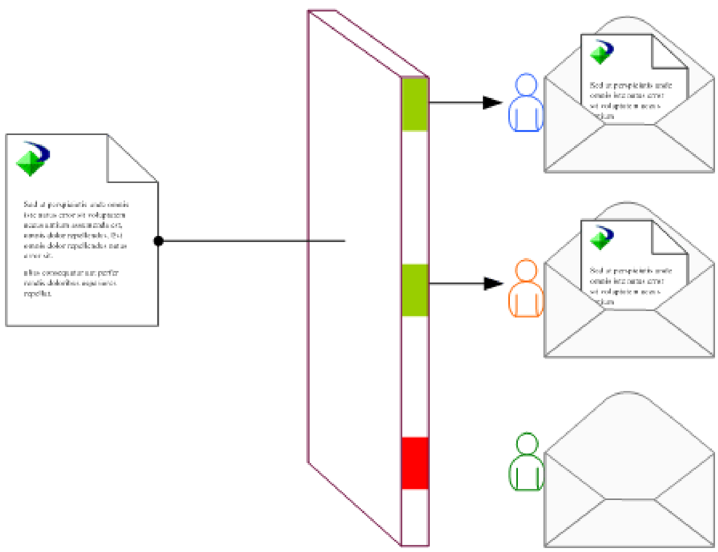


Figure 9-2: Recipient delivery rule unmet

For publications that contain multiple documents and objects, each document can have its own recipient delivery rule. When you do this, you have the following options for processing and delivery:

- If a document in the publication fails to meet its recipient delivery rule for a recipient, the entire publication will not be delivered for that recipient.
- If a document in the publication fails to meet its recipient delivery rule for a recipient, that document will not be delivered, but all other documents in the publication will be delivered for that recipient.

Delivery rules are useful because they allow publications intended for a large number of recipients to be processed and distributed more efficiently. Consider a situation in which a publisher at an insurance company creates a publication for its clients that contains the following objects:

- An insurance bill (personalized Crystal report).
- A monthly statement (personalized Crystal report).
- A payment methods brochure (PDF).

In the insurance bill, there is an Amount Due alert for values greater than zero. The publisher creates an Amount Due recipient delivery rule for the insurance bill so that the insurance bill is published and distributed only if a client owes a payment. The publisher also specifies that the entire publication will not publish if the insurance bill fails to meet the delivery rule because he does not want clients to receive a monthly statement and a brochure when they do not have to pay a bill. When the publication is run, the publication is processed and distributed only to clients who owe payments.

Note:
If a Crystal reports publication is scheduled to print when the publication runs, the print job occurs regardless of whether a document in a publication fails to meet a delivery rule and is not delivered to a recipient. This is because print jobs are processed during personalization, and delivery rules are applied to publications after personalization.

Related Topics

- To set a global delivery rule on a Crystal report
- To set a recipient delivery rule on a Crystal report

9.3.3 Dynamic recipients

“Dynamic recipients” are publication recipients who exist outside of BI platform. Dynamic recipients already have user information in an external data source, such as a database or an LDAP or AD directory, but do not have user accounts in BI platform

To distribute a publication to dynamic recipients, use a “dynamic recipient source” which is a document or custom data provider that provides information about publication recipients outside of BI platform. Dynamic recipient sources allow you to easily maintain information for dynamic recipients by linking directly to the external data source and retrieving the most recent data. They also decrease administrative costs because you do not have to create BI platform user accounts for dynamic recipients before you distribute publications to them.

Consider a situation in which a billing company distributes bills to customers who are not BI platform users. The customer information already exists in an external database. The publisher creates a document based on the external database and uses the document as a dynamic recipient source for a publication. Customers receive the billing publication, and the dynamic recipient source allows the publisher and the system administrator to maintain up-to-date contact information.

You can do the following with a dynamic recipient source:

- Deliver a single publication to dynamic recipients and BI platform users simultaneously.

  Note:

  - Only one dynamic recipient source can be used per publication.
  - Dynamic recipients cannot unsubscribe themselves automatically from a publication.
- Preview dynamic recipients list when you create a publication.

- Specify whether you want to deliver a publication to all dynamic recipients, or to include or exclude certain dynamic recipients.
- Deliver publications to external destinations such as email or an FTP server.

  Note:
  BI Inboxes are invalid destinations for dynamic recipients because they do not have user accounts in BI platform.

To use a dynamic recipient source, specify a column for each of the following values:

- Recipient ID (required)
- Full name of recipient
- Email address

The recipient ID column determines the number of dynamic recipients who will receive the publication. It is recommended that you sort the dynamic recipient source according to recipient ID.

For general information about creating reports, see the *SAP Crystal Reports User Guide*. For information about creating a custom-coded dynamic recipient source, see the *SAP BusinessObjects Business Intelligence Platform Java SDK Developer Guide*.

Related Topics

• To specify dynamic recipients

9.3.4 Destinations

Destinations are locations you deliver publications to. A destination can be the BI platform location in which a publication in stored, a BI Inbox, an email address, an FTP server, or a directory on the file system. You can specify several destinations for a publication.

If you publish multiple Crystal reports, you can merge them into a single PDF on a per destination basis.

If you publish a publication as a single ZIP file, you can zip or unzip instances on a per destination basis (for example, zip the instances for email recipients and leave them unzipped for BI Inboxes).

Related Topics

• To embed content from a dynamic content source document in an email
• To specify a destination for the publication
• Possible destinations

9.3.4.1 Possible destinations

<table>
<tr><th>Destination</th><th>Description</th></tr>
<tr><td>Default Enterprise location</td><td>The publication is accessible from the folder it was created in. For the default destination, you have these options:
• Merge all PDF documents (Crystal reports only).
• Package the publication as a ZIP file.
Note:
If you distribute to the default location or a shortcut to a recipient's BI Inbox, choose a folder accessible to all recipients.</td></tr>
<tr><td>BI Inbox</td><td>To send to a recipient's BI Inbox, you have these options:
• Deliver objects to each user.
• Type a name, use placeholders or use the default name.
• Have the publication sent as a shortcut or as a copy.
• Merge all PDF documents (Crystal reports only).
• Package the publication as a ZIP file.</td></tr>
<tr><td>Email</td><td></td></tr>
</table>

Destination	Description
	The publication is emailed to recipients with a message. Check that email settings are configured correctly on the Adaptive Job Server. The publication is sent to recipients via email. For email recipients, it is recommended that you complete the From field. If you do not complete the From field, BI platform uses the email address associated with the publisher's account. If the publisher's account has no email address, BI platform uses the Adaptive Job Server's settings. **Note:** If there is no From value provided by the From field, the publisher's account, or the Adaptive Job Server, the publication will fail. You also have these choices: • Deliver objects to each user. • Complete the **To** field or enter a placeholder for the email address. • Complete the **Cc** field. • Complete the **Bcc** field. • Enter the subject or select a placeholder to use for the **Subject** field. • Enter text in the **Message** field to be delivered with your publication. You can also choose from a list of placeholders to use in the **Message** field and embed a dynamic content document in the body of the email. • Attach source document instances to the email. • Have the attachment name automatically generated, to enter a specific name for it, or to choose from a list of placeholders. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file. **Note:** Before you use this destination, ensure that your email settings are configured properly on the Adaptive Job Server. If you are sending publications to recipients via email, ensure the placeholder %SI_EMAIL_ADDRESS% is in the To field and Deliver objects to each user is selected.
FTP server	For FTP server, complete the **Host** field. If you do not complete the **Host** field, the option configured for the Adaptive Job Server will be used. Choose from these options: • Specify a port number, a user name and password, and an account. • Enter a directory name. • Have the file name automatically generated, type a custom name or to choose from a list of placeholders. If **Specific name** is selected, you can also choose to add a file extension. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file.

Destination	Description
Local disk	If you choose local disk as the destination, you must enter the directory for your publication. You also have these choices: • Deliver objects to each user. • Have the file name automatically generated for you. Or, enter a specific name for the file, or to choose from a list of placeholders. If you select a specific name, you can also choose to add a file extension. • Enter a user name and password to access the file location. • Merge all PDF documents (Crystal reports only). • Package the publication as a ZIP file.

Note:

- **Deliver objects to each user** is selected by default for all destinations. However, in some cases, you may not want to deliver objects to each user. For example, three recipients have identical personalization values and thus receive the same data in their publication instances. If you clear **Deliver objects to each user**, one publication instance is generated and delivered to all three recipients. If you select **Deliver objects to each user**, the same publication instance is delivered three times (once for each recipient). Additionally, if you are sending the publication to an FTP server or local disk destination and some recipients share identical personalization values, you can clear **Deliver objects to each user** to decrease overall processing time.
- If you clear **Deliver objects to each user**, any placeholders that you use when you configure your destinations will contain the publisher's information and not the recipient's.

9.3.5 Formats

Formats define the file types that a publication's documents will be published in. A single document can be published in multiple formats, and these instances can be delivered to multiple destinations. For publications with multiple documents, you can specify a different format for each. For publications that contain Web Intelligence documents, you can publish the whole document or a report tab within the document to different formats.

Any formats you choose for a document apply to all recipients of the publication. For example, you cannot publish a document as a Microsoft Excel file for one recipient and as a PDF for another. If you want the recipients to receive instances in those formats, each recipient will receive a Microsoft Excel file and a PDF.

Related Topics

• To specify formats for a Crystal report
• To specify formats for an Web Intelligence document

9.3.5.1 Possible formats

Document type	Format	Description
All document types	mHTML	This option publishes the document in mHTML format. You can also embed a document's content as mHTML in an email: • For Crystal reports, you can embed the content of one report in an email. • For Web Intelligence documents, you can embed the content of one report tab in an email. When mHTML is selected, the output will reflect the order in which the source documents are arranged on the document selection screen. For example, the documents displayed at the top of the screen will appear at the top of the email.
	PDF (.pdf)	This option publishes a document as a static PDF. **Note:** When this is used together with the PDF merging option, the output will reflect the order in which the source documents are arranged on the document selection screen. For example, the documents displayed at the top of the screen will appear at the top of the merged PDF.
	Microsoft Excel file (.xls)	This option publishes a document as a Microsoft Excel file and preserves as much of the original format of the document as possible.

Document type	Format	Description
Crystal reports	Data only Microsoft Excel file (.xls)	This option publishes a Crystal report as a Microsoft Excel file that contains data only.
	XML	This option publishes a Crystal report in XML format.
	Crystal report (.rpt)	This option publishes a Crystal report in its original format.
	Crystal report read-only (.rptr)	This option publishes a Crystal report in read-only format.
	Microsoft Word file (.doc)	This option publishes a Crystal report as a Microsoft Word file and preserves the original formatting of the Crystal report. This option is recommended if you expect recipients to view the publication without making many changes to it.
	Editable Microsoft Word file (.rtf)	This option publishes a Crystal report as a Microsoft Word file that you can edit more easily. This option is recommended if you expect recipients to view the publication and edit its content.
	Rich text (.rtf)	This option publishes a Crystal report in rich text format.
	Plain text (.txt)	This option publishes a Crystal report in plain text format.
	Paginated text (.txt)	This option publishes a Crystal report in plain text format and paginates the content of the publication.
	Tab-separated text (.txt)	This option publishes a Crystal report in plain text format and separates the content in each column using tabs.
	Character-separated values (.csv)	This option publishes a Crystal report as a character-separated values file.
Web Intelligence documents	Web Intelligence document (.wid)	This option publishes a Web Intelligence document in its original format.

9.3.6 Personalization

"Personalization" is the process of filtering data in source documents so that only relevant data is displayed for publication recipients. Personalization alters the view of the data, but it does not necessarily change or secure the data being queried from the data source.

The diagram “Personalization” illustrates how personalization works. An unpersonalized report contains data types 1, 2, and 3. When the personalization is applied to the report, users receive only the data that is relevant to them: User 2 receives only data type 2, User 1 receives only data type 1, and User 3 receives only data type 3.

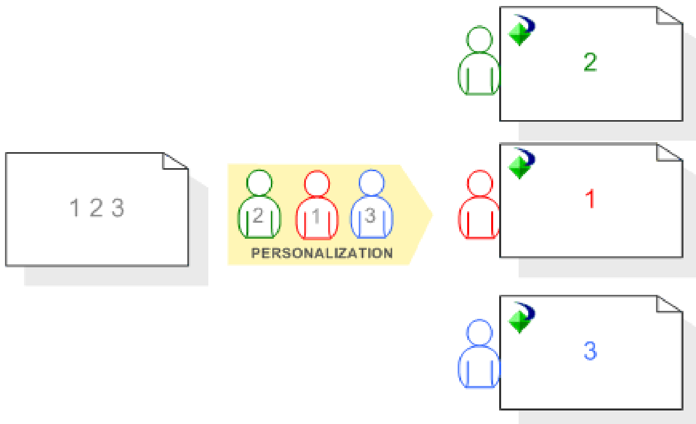


Figure 9-3: Personalization

To personalize source documents for recipients, you can do the following:

- If the recipients are Enterprise recipients, you can apply a profile when you design the publication. Profiles for Enterprise recipients must be configured in BI platform, before you can personalize a publication.
- If the recipients are dynamic recipients, you can map a data field or column in the source document to data in the dynamic recipient source. For example, you can map a Customer ID field in a source document to the Recipient ID field in the dynamic recipient source.

Note:
To view a list of recipients who will receive unpersonalized publication instances after personalization, click **Advanced** on the navigation list and select **Display users who will receive the complete publication with no personalization applied**.

Related Topics

- To personalize a Crystal report using parameter values
- To personalize a Crystal report by filtering fields
- To personalize an Web Intelligence document using a global profile target
- To personalize an Web Intelligence document by filtering fields
- Personalized placeholders for publication source document names

9.3.7 Publication extensions

A publication extension is a library of code that applies business logic to publications. Use extensions when you need automated customization of publications after processing or delivery.

Use publication extensions to perform the following tasks after processing:

- Merge documents of the same type (for example, merging multiple Excel spreadsheets into a single Excel workbook).
- Add password protection to or encrypt a document.
- Convert a document to a different format.
- Create custom log files for the publication job.

Note:
You can specify publication extensions only in CMC. You cannot do this if you are designing a publication in BI launch pad.

For more information about publication extensions, see the *SAP BusinessObjects Business Intelligence Platform Java SDK Developer Guide*.

Related Topics

• To specify publication extensions

9.3.8 Subscription

A “subscription” lets users who are not publication recipients sign up to view the latest instance. Subscribers can also unsubscribe from a publication at any time. If users have the appropriate rights,they can subscribe and unsubscribe other users.

To subscribe to or unsubscribe from a publication, you need a BI platform account and the following rights:

- Access to BI launch pad or CMC.
- View rights to see the publication
- Subscriber rights for the user account (for Enterprise recipients)

Note:
Dynamic recipients can't subscribe and unsubscribe themselves automatically.

Related Topics

• To subscribe to or unsubscribe from a publication

9.3.9 PDF merging for Crystal reports

You can merge PDF instances of Crystal reports and static PDF documents into a single PDF for convenience. All static PDF source documents are included in the merged PDF. Static source documents that are not PDF files are excluded from the merged PDF.

With a merged PDF you can also:

- Add and format a table of contents.
- Insert running page numbers.
- Add user and owner passwords to view and edit the PDF.
- Set restrictions on what recipients can do with the PDF.

9.4 Rights required for Publishing

Role	Task	Rights required
Document designer	Create the document on which the publication is based	None
Document designer	Add the document to BI platform	• View and Add rights on the folder or category to which the document will be added
Document designer	Create a document to be used as a dynamic recipient source	• View and Add rights on the folder or category to which the document will be added
Publisher	Create a publication	• Add right on the folder where the publication is saved • View right on users and groups intended as recipients • View right on the profile that is used for personalization • View right on documents and other documents for the publications • Schedule rights on the documents • Subscribe rights on the Enterprise recipients

Role	Task	Rights required
Publisher	Schedule a publication	**Note:** It is recommended that only the publisher has these rights. • View, Schedule, Add, and Modify Security rights on the publication • Delete Instance right on the publication • View right on users and groups intended as recipients • View right on the profile that is used for personalization • View and Schedule rights on the documents • View and Refresh rights on the dynamic recipient source • View and Refresh rights on the document on which a delivery rule is set • Data Access right on any universes used by the publication's objects • Data Access right on any universe connections used • Add and View rights on recipients' BI Inboxes (when you schedule to inboxes) • “Modify the rights users have to objects” on the folder containing the publication • Subscribe rights on the recipients • Print right on Crystal report source documents if the publisher wants to print publication instances • “Schedule on behalf of other users” right on Enterprise recipients (if you use **One database fetch per recipient**)
Publisher	Retry a failed publication instance	• Same rights required to schedule a publication • Edit right on the publication instance

Role	Task	Rights required
Publisher	Redistribute a publication instance	• View, Schedule, Add, and Modify Security rights on the publication • Add and View rights on recipients' BI Inboxes • View Instance and Edit rights on the publication instance
Recipient	View a publication	• View right on the publication • View Instance right on the publication **Note:** You need these rights to view a publication object in BI platform. You do not need these rights to see content sent to a BI Inbox.
Recipient	Subscribe to or unsubscribe from a publication	• View right on the publication • Subscribe right on the Enterprise recipients

9.4.1 Publishers and recipients: Who has rights to view what?

A publisher (who owns and schedules the publication) can view all publication instances for all recipients; recipients can view their personalized publication instances only. This rights setup ensures maximum security for publication data because it reserves the rights to schedule publications and to view all publication instances for the publisher only.

Tip:
If you are a publisher and want to add yourself to a publication as a recipient, use two user accounts for yourself, a Publisher account and a Recipient account. The Publisher account grants you the rights you require when you design and schedule publications, while the Recipient account grants you the rights of a typical recipient.

Working with Publications

10.1 Designing publications

To design a new publication, you first access the Publishing feature in BI platform. You can do this in the Central Management Console (CMC) or in BI launch pad depending on the rights that you have and your access to the web-based applications in BI platform.

At any point during the publication design process, you can save changes you made to the publication, close it, reopen it, and make further changes.

10.1.1 Designing publications for use with SAP BusinessObjects Live Office

When you design publications intended for use with SAP BusinessObjects Live Office, consider the following information:

- Dynamic content documents can consist only of Crystal reports or Web Intelligence documents in their original format.
- Dynamic recipients are not supported.
- The only destination option you can use is the default enterprise location.
- If recipients receive multiple publication instances after personalization, only the first publication instance can be viewed in the SAP BusinessObjects Live Office Client. This issue can occur if a recipient inherited multiple profile values from group membership. To work around this issue, assign only the necessary profile values to recipients.

Related Topics

• Personalization

10.1.2 Designing publications for SAP recipients

A publication intended for SAP recipients works the same way as a publication intended for Enterprise and dynamic recipients except for two important differences exist in the Publishing workflow:

- You do not use the settings in the "Personalization" section to personalize source documents for SAP recipients. SAP recipients already have profile values mapped to their user accounts outside of the BI platform. This serves as a built-in personalization method for SAP recipients. You do not need to create profiles and profile values for SAP recipients in the BI platform, or to map profiles to source document fields.
- The only report bursting method that works for a publication intended for SAP recipients is **One database fetch per recipient**. This method maximizes security and ensures that the database logon credentials of each publication recipient are processed individually.

For more information about single sign-on configuration and authentication, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

10.1.3 To create a new publication in the CMC

This task lets you access the Publishing feature in the CMC and begin creating a publication.

1. Go to the Folders area of the CMC.
2. In the "Group Tree", browse for the folder in which you want to create the publication.
3. Select the folder so that its contents appear in the "Details" panel.
4. Click **Manage** > **New** > **Publication**.

   The "New Publication" page appears.

On the "New Publication" page, you can specify all the information required for your publication, including source documents, recipients, delivery formats and destinations, and how documents are personalized.

10.1.4 To create a new publication in BI launch pad

This task lets you access the Publishing feature in BI launch pad and begin creating a publication.

1. Go to the Documents tab.
2. Expand the **Folders** drawer and browse for the folder in which you want to create the publication.
3. Select the folder so that its contents are displayed in the List panel.
4. Click **New** > **Publication**.

   The "New Publication" page appears.

On the "New Publication" page, you can specify all the information required for your publication, including source documents, recipients, delivery formats and destinations, and how those documents are personalized.

10.1.5 To open an existing publication

Use this procedure to open an existing publication and edit its metadata.

1. Select the publication.
   - If you are in BI launch pad, on the Documents tab, expand the **Folders** drawer and browse for the publication.
   - If you are in the CMC, go to the "Folders" area and browse for the publication.
2. Open the publication's properties.
   - If you are in BI launch pad, select the publication and click **View** > **Properties**.
   - If you are in the CMC, select the publication and click **Manage** > **Properties**.

You can now edit the metadata for the publication.

10.1.6 To enter general properties for a new publication

1. Click **General Properties**.
2. In the **Title** field, enter a title for the publication.

   Note:
   A title is mandatory for the publication design process.
3. In the **Description** field, enter a description for the publication.
4. In the **Keywords** field, enter keywords that are associated with the publication's content.

10.1.7 To select source documents

After you enter general properties for the publication, choose source documents to include. Subsequent options vary depending on the dynamic content document type.

1. Click **Source Documents**.
2. Click **Add**.

   The "Select Source Documents" dialog box appears.
3. Browse for the source documents you want to include and select them.

   Note:
   Dynamic content documents must be the same document type.

Tip:
Use **CTRL** + **click** or **SHIFT** + **click** to select multiple source documents, or double-click a single source document to select it.

4. Click **OK**.

   The "Select Source Documents" dialog box closes. The source documents that you selected appear in the **Selected** list.
5. Select or clear the **Refresh At Runtime** check boxes that are next to the source documents.

   Your selections determine whether a particular source document is refreshed against the data source when the publication runs. If you do not need to refresh a source document, it is recommended that you clear the **Refresh At Runtime** check box for that document to improve publication performance.

If you plan to send the source documents as attachments or as a merged PDF, you can change the order in which the documents appear. To do this, select a document on the **Selected** list, and click **Move Up** or **Move Down**.

10.1.8 To select Enterprise recipients

Perform this task if you want Enterprise recipients to receive the publication.

1. Click **Enterprise Recipients**.
2. In the "Available" area, browse for the users or groups that you want to include or exclude as recipients.
   a. Click **User List** to display a list of all users in BI platform, or click **Group List** to display a list of all groups.
   b. Select the users and groups.

   Tip:
   Use **Shift** + **click** or **CTRL** + **click** to select multiple users or groups.
3. If you want to include the recipients you selected, move them to the **Selected** list.
4. If you want to exclude the recipients you selected, move them to the **Excluded** list.

10.1.9 To specify dynamic recipients

To specify dynamic recipients, you must have a dynamic recipient source already designed and ready for use. The dynamic recipient source contains recipient data and can be a Crystal report, a Web Intelligence document, or a custom-coded data provider.

For information about creating a custom-coded dynamic recipient source, see the *SAP BusinessObjects Business Intelligence Platform Java SDK Developer Guide*.

Tip:
It is recommended that you sort the recipient data according to the recipient ID field to enable more efficient processing of the publication.

Perform this task if you want recipients who are not BI platform users to receive the publication.

1. Click **Dynamic Recipients**.
2. On the **Choose the source for the dynamic recipients** list, choose the format of the dynamic recipient source.

   Note:
   Crystal report dynamic recipient sources cannot be in RPTR format.

3. In the right-hand pane, browse for the object you want to use as a dynamic recipient source, select it, and click **OK**.
4. If you chose to use a Web Intelligence document as a dynamic recipient source, on the **Select the datasource name for the document** list, select a query that appears in the document.

   Note:
   Dynamic recipient data comes from the query and may not match the data that appears when you view the document. Depending on how the query is built, dynamic recipient sources created in the Web Intelligence component may contain values that do not correspond to data in the publication's source documents. For example, a filter in the report may exclude relevant values, or duplicate records may appear because the query has been set to retrieve duplicate rows. It is recommended that you review the full list of dynamic recipients during the publication design process.

5. On the **Recipient Identifier** list, select a field that contains the recipient identity values.
6. If necessary, on the **Full Name** list, select a field that contains the full names of recipients.
7. If you intend to deliver the publication to email addresses, on the **Email** list, select a field that contains the recipient email addresses.
8. Decide whether you want to distribute the publication to all dynamic recipients listed by the dynamic recipient source.
   - If you want to distribute the publication to all dynamic recipients, ensure **Use entire list** is selected.
   - If you want to include or exclude some dynamic recipients:
     a. Clear **Use entire list**.
     b. On the **Available** list, select the check boxes next to the recipients you want to include or exclude.
     c. If you want to include the recipients you selected, move them to the **Selected** list.
     d. If you want to exclude the recipients you selected, move them to the **Excluded** list.

After you specify dynamic recipients for the publication, you can personalize the publication for dynamic recipients by mapping a field in the source document to a column in the dynamic recipient source.

Related Topics

• Dynamic recipients
• To personalize a Crystal report by filtering fields
• To personalize an Web Intelligence document by filtering fields

10.1.10 To specify a destination for the publication

1. Click **Destinations**.
2. Under **Select Destinations**, choose a destination check box.

   Note:
   Each destination provides a variety of options relating to how the publication is delivered

3. To avoid keeping publication instances on your system, deselect the option **default Enterprise location**.

   Tip:
   Set a low instance limit on the publication object. For detailed instructions, see the *SAP BusinessObjects Business Intelligence Platform User Guide*.

4. Choose a destination in the **Show options for selected destinations** list.

   Additional configuration options for the destination appear.
5. As an option, specify a name for your publication by choosing **Use Specific Name**. (By default, a system-generated name will be assigned to the publication unless you choose this option.) Enter a name or select from a list of placeholders in the **Add placeholder** list.

   A placeholder is a container for variable data. At run time, the value is inserted into the placeholder.
6. If your publication contains multiple documents, you can specify a name for each one by choosing **Specific Name per Document**.

   By default, each document will be assigned the same system-generated name unless you select this option. Enter a name or choose from a list of placeholders in the **Add placeholder** list.
7. If you are sending a publication to the default Enterprise location and to recipient email addresses, you can embed a link to the Enterprise location in the email body.

   Enterprise recipients must have View rights on the publication to view publication instances. To do this, position the cursor in the **Message** box and click **Viewer Hyperlink** in the **Add placeholder** list that is under the **Message** box. The placeholder `%SI_VIEWER_URL%` is inserted in the email. This placeholder is replaced by a link when the publication is run.

   Dynamic recipients are unable to access the publication instance because they do not have BI accounts.

Related Topics

- Destinations
- Possible destinations
- Personalized placeholders for publication source document names

10.1.11 Personalized placeholders for publication source document names

If you used "Personalization" to filter data in the source documents, you can use personalized placeholders to name publication instances.

Incorporating personalized placeholders into file names helps recipients easily identify the data that has been filtered. Recipients who belong to multiple user groups with different personalization values can distinguish between multiple versions of the same source document without viewing its contents.

Once personalization has been set up for a publication, personalized placeholders appear in the **Add placeholder** list on the Destinations page.

Note:
If your publication contains more than one source document, the **Add placeholder** list for **Use Specific Name** shows personalized placeholders only if all source documents have been filtered on the same field.

For every filter of a report, the following personalized placeholders appear:
- One placeholder is for the field name. Represented as %<field name>-NAME%, it will be replaced by the name of the field at run time. This placeholder appears for all recipients.
- One placeholder is for the personalized value of the field. Represented as %<field name>-VALUE%, it will be replaced by the value of the field used to filter the report. Note that this placeholder is specific for each recipient.

To use personalized placeholders, make the following selections in the **Show options for selected destinations** area:
1. For the publication name, select the **Use Specific Name** option and choose the placeholder you want from the **Add placeholder** list. To add several placeholders, repeat this step. To combine text and a placeholder, first enter text and then choose the placeholder.
2. For individual documents, choose the **Specific Name per Document** option. Beside the title of each document, choose the placeholders you want from the **Add placeholder** list. To add several placeholders, repeat this step. To combine text and a placeholder, first enter text and then add the placeholder.
3. To save and exit, select **Save & Close**. To save your selections but choose another destination or choose additional options, select **Save**.

Example:

Assume you are publishing a quarterly sales report for two user groups: Canadian sales managers and American sales managers. The Crystal report is named Quarterly Sales by Country. Personalization has been applied to the country field; each group receives data for its respective country. For the American sales managers, the profile value for the country field is "US" while for the Canadian sales managers, the profile value for the country field is "Canada".

These three personalized placeholders appear in the **Add placeholder** list:

- Document Name. The code %SI_DOCUMENT_NAME% is inserted into the field.

- %Country - Query 1-NAME. The code %SI_field name-NAME% is inserted into the field.
- %Country - Query 1-VALUE%. The code %SI_field name-VALUE% is inserted into the field.

The report sent to American sales managers (filtered to show only US data) is named Quarterly Sales by Country_US.pdf. The report sent to Canadian sales managers (filtered to show only Canadian data) is named Quarterly Sales by Country_Canada.pdf.

10.1.12 Personalized placeholders for email fields

If all source documents in a publication have been personalized using the same field, you can use personalized placeholders in **Subject** and **Message** fields when you email the publication.

For each filter used on the report during personalization, these two placeholders are displayed in the **Add placeholder** list:

- %Field - Query 1-VALUE%. This is the personalized value of the field. At run time, this is replaced by the value of this field used to filter the report. Note that this placeholder is specific to each recipient.
- %Field - Query 1-NAME%. This is the name of the field. At run time, this is replaced by the actual name of the field. Note that this placeholder is identical for all recipients.

Note:
If your publication contains several source documents, the **Add placeholder** list for **Subject** and **Message** fields displays personalization parameters only if all source documents have been filtered on the same field(s).

10.1.13 To embed content from a dynamic content source document in an email

You can embed content from dynamic content documents in the body of an email. For Crystal reports, you can embed content from a report. For Web Intelligence documents, you can embed an entire document or a single report tab.

1. Click **Formats**.

   The "Formats" section appears.
2. Select the dynamic content document that you want to embed in the email.

Document type	Selection method
Crystal report	On the **Title** list, select the report.
Web Intelligence document	On the **Document** list, select the document.

3. Select mHTML as a publication format for the dynamic content document that you selected.

Document type	Selection method
Crystal report	On the **Format Options** list, select the **mHTML** checkbox.
Web Intelligence document	On the **Output Format** list, select the **mHTML** checkbox.

4. For Web Intelligence documents, choose whether to publish the entire document or one report tab in the document.
   a. Ensure **mHTML** is selected on the **Output Format** list.
   b. If you want to publish the entire document, leave **All reports** selected; if you want to publish a single report tab, click **Select one report** and choose a report tab on the list.
5. On the navigation list, click **Destinations**.

   The "Destinations" section appears.
6. In the "Select Destinations" area, select **Email**.
7. On the **Show options for** list, click **Email**.

   Additional configuration options for the email destination option appear.
8. In the **From** box, type a name or email address or choose Email from the **Add placeholder** list.

   For example, you can type Robert, Publisher, or publisher@sap.com. If you type a name, it will be appended to your email server (for example, Publisher@*emailserver*).
9. Type a subject in the **Subject** box. To insert a placeholder, choose an option such as Title from the **Add placeholder** list. If you personalized the report, personalized placeholders are available in the the **Add placeholder** list.
10. Type any message text you want the body of the mail to contain in the **Message** box.
11. To embed dynamic content into the **Message** box, position the cursor in the **Message** box where you want to embed the document content, go to the **Add placeholder** list under the **Message** box and choose **Report HTML Content**.

    %SI_DOCUMENT_HTML_CONTENT% appears in the **Message** box. When the publication is run, this placeholder is replaced by the personalized content of the dynamic content document you specified.
12. If your publication contains other source documents, ensure **Add Attachment** is selected and the attachment options are configured properly.

    The other source documents in the publication will be added to the email as attachments when the publication is run.

10.1.14 To specify scheduling information

Perform this task to specify scheduling information for the publication.

1. Expand **Additional Options** and click **Recurrence**.
2. On the **Run object** list, choose a recurrence pattern for how often you want to run the publication.
3. For the recurrence pattern, specify run options and parameters as required.

Related Topics

• Scheduling objects
• To choose a recurrence pattern

10.1.15 Design tasks for Crystal reports publications

10.1.15.1 To personalize a Crystal report using parameter values

Note:
To perform this task, the Crystal report must contain parameters. Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI Platform.

The "Personalization" section lets you personalize a Crystal report for recipients based on the predefined parameter values for each recipient.

Personalizations that are based on parameter values may be overridden by other personalization methods. For example, if a profile is mapped to a parameter, and the profile value for an Enterprise recipient conflicts with the parameter value, the profile value will override the parameter value when the publication runs. Similarly, if a personalization value in the dynamic recipient source conflicts with a parameter value for a dynamic recipient, the parameter value will be overridden when the publication runs.

Note:
It is recommended that you personalize Crystal reports with local profile targets when possible. Parameter-based personalization requires one database fetch per recipient when the parameter is used in a record selection formula, command, table or stored procedure. This can increase publication processing time.

1. Click **Personalization**.

2. In the "Parameters" area, ensure the default values for the listed parameters are correct.

   If you want to change a default value, click the **Edit Values** button that is next to the parameter value. Select or enter the parameter value, and click **OK**.

3. If you want to override the default parameter personalization with Enterprise recipients' profile values, choose a profile from the list in the **Enterprise Recipient Mapping** column.

   Note:
   This option only appears if your publication is intended for Enterprise recipients.

   If this profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.

   Note:
   If you are only using default parameter values to personalize a report, it is recommended that you set **Enterprise Recipient Mapping** to **Default value for all recipients**.

4. If you want to override the default parameter personalization with dynamic recipients' personalization values, choose a dynamic recipient source column from the list in the **Dynamic Recipient Mapping** column.

   Note:

   - This option only appears if your publication is intended for dynamic recipients.
   - If you are only using default parameter values to personalize a report, it is recommended that you set **Dynamic Recipient Mapping** to **Not Specified**.

10.1.15.2 To personalize a Crystal report by filtering fields

Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI Platform.

Perform this task if you want to personalize a Crystal report by filtering a field in the Crystal report. When you use filters, a ViewTime selection formula is added to the report to filter data. This formula is applied when the publication runs and is not saved in the report. You can filter multiple fields in a Crystal report.

Note:

- Static-value profile values can filter string fields in Crystal reports only. To filter other types of fields, use expression profile values. If you map the incorrect type of field to the profile, personalization will fail.
- This feature is unavailable for Crystal reports in RPTR format.

1. Click **Personalization**.
2. In the "Filters" area, choose a Crystal report field from the list in the **Report Field** column.

   The list of available fields includes all database fields and recurring formulas in the main report or non-on-demand subreports.

3. Choose a profile from the list in the **Enterprise Recipient Mapping** column.

This setting maps the report field to the profile values that are defined for Enterprise recipients.

Note:
This option only appears if your publication is intended for Enterprise recipients.

If this profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.

4. Choose a dynamic recipient source column from the list in the **Dynamic Recipient Mapping** column.

   This setting maps the report field to a column in the dynamic recipient source that contains corresponding values.

   Note:
   This option only appears if your publication is intended for dynamic recipients.

5. Repeat steps 2 to 4 for every report field that you want to filter.

Related Topics

- Personalization

10.1.15.3 To specify formats for a Crystal report

1. Click **Formats**.
2. On the **Documents** list, select a Crystal report.

   The "Format Options" area appears and lets you select the publication formats for the Crystal report you selected.
3. On the **Format Options** list, select the check boxes next to the formats you want.

   The formats are selected.
4. On the **Format Options** list, click the name of a format you selected.

   Note:
   Depending on the format option, the subsequent steps may not apply.

   Additional options appear that let you customize the format. For more information about some of these options, see Additional customization options for Crystal reports formats.
5. If you want to use the default export options defined in the source document, leave **Use the export options defined in the report** selected; otherwise, clear **Use the export options defined in the report**
6. Enter additional information to customize the appearance of the format you chose.
7. Repeat steps 4 to 6 for each format in which you want to publish the Crystal report.

After you finish, you must repeat steps 2 to 7 for each Crystal report in the publication.

Related Topics

- Formats
- Possible formats

10.1.15.3.1 Additional customization options for Crystal reports formats

This section summarizes the formats for which additional customization options are available.

Microsoft Excel (97-2003)

The following options are available for Crystal reports that are published as Excel files:

- **Page Range**

  Click **All** to publish the entire report as an Excel file. Alternatively, click **Pages** and enter page range numbers in the **from** and **to** fields to publish specific report pages.

If you clear **Use the export options defined in the report**, the following options are also available:

- **Set Column Width**

  Click **Column width based on objects in the** and choose an option on the list to define column widths relative to objects in the report. Alternatively, click **Constant column width (in points)** and enter a numerical value in the field to define a constant width for all columns.
- **Export page header and page footer**

  Choose an option on the list to set how frequently headers and footers appear in the Excel file.
- **Create page breaks for each page**

  Select this option to create page breaks that reflect the page breaks in the report.
- **Convert date values to strings**

  Select this option to convert date values to text strings.
- **Show gridlines**

  Select this option to include gridlines in the Excel file.

Microsoft Excel (97-2003) (Data Only)

If you clear **Use the export options defined in the report** , the following options are available:

- **Set Column Width**

  Click **Column width based on objects in the** to define column widths relative to objects in the report, and choose an option on the adjacent list. Alternatively, click **Constant column width (in points)** to define a constant width for all columns and enter a numerical value in the adjacent field.
- **Export object formatting**

  Select this option to preserve object formatting.
- **Export images**

Select this option to publish report images in the Excel file.

- **Use worksheet functions for summaries**

  Select this option to use the report summaries to create worksheet functions for the Excel file.

- **Maintain relative object position**

  Select this option to preserve the relative position of report objects.

- **Maintain column alignment**

  Select this option to preserve the column alignment from the report.

- **Export page header and page footer**

  Select this option to include headers and footers in the Excel file.

- **Simplify page headers**

  Select this option to simplify page headers.

- **Show group outlines**

  Select this option to show group outlines from the report.

Microsoft Excel Workbook Data-only

If you clear **Use the export options defined in the report** , the following options are available for Crystal reports published as Excel 2007 files:

- **Set Column Width**

  Click **Column width based on objects in the** to define column widths relative to objects in the report, and choose an option on the adjacent list. Alternatively, click **Constant column width (in points)** to define a constant width for all columns and enter a numerical value in the adjacent field.

- **Export object formatting**

  Select this option to preserve object formatting.

- **Export images**

  Select this option to publish report images in the Excel file.

- **Use worksheet functions for summaries**

  Select this option to use the report summaries to create worksheet functions for the Excel file.

- **Maintain relative object position**

  Select this option to preserve the relative position of report objects.

- **Maintain column alignment**

  Select this option to preserve the column alignment from the report.

- **Export page header and page footer**

  Select this option to include headers and footers in the Excel file.

- **Simplify page headers**

  Select this option to simplify page headers.
- **Show group outlines**

  Select this option to show group outlines from the report.

Microsoft Word (97-2003)

The following options are available for Crystal reports that are published as Word files:

- **Page Range**

  Click **All** to publish the entire report as a Word file. Alternatively, click **Pages** and enter page range numbers in the **from** and **to** fields to publish specific report pages.

PDF

The following options are available for source documents that are published as PDF files:

- **Page Range**

  Click **All** to publish the entire source document as a PDF file. Alternatively, click **Pages** and enter page range numbers in the **to** and **from** fields to publish specific pages.

If you clear **Use the export options defined in the report**, the following options are also available:

- **Create bookmarks from group tree**

  Note:
  If you plan to publish a Crystal reports publication as a merged PDF that contains a table of contents, you must select this option.

Rich Text Format (RTF)

The following options are available for Crystal reports that are published as rich text files:

- **Page Range**

  Click **All** to publish the entire source document as a PDF file, or click **Pages** and enter page range numbers in the **to** and **from** fields to publish specific pages.

Microsoft Word - Editable (RTF)

The following options are available for Crystal reports that are published as editable Word files:

- **Page Range**

  Click **All** to publish the entire report as a Word file. Alternatively, click **Pages** and enter page range numbers in the **from** and **to** fields to publish specific report pages.

If you clear **Use the export options defined in the report**, the following options are also available:

- **Insert page break after each report page**

  Select this option to create page breaks that reflect the page breaks in the report.

Plain Text

If you clear the **Use the export options defined in the report** check box, the following options are available for Crystal reports that are published as plain text files:

- **Number of characters per inch**

  Enter a value to define how many characters appear per inch in the plain text file.

Paginated Text

If you clear the **Use the export options defined in the report** check box, the following options are available for Crystal reports that are published as paginated text files:

- **Number of Lines per Page**

  Enter a value to define how many lines will be on each page of the paginated text file.

- **Number of Characters per Inch**

  Enter a value to define how many characters appear per inch in the paginated text file.

Separated Values (CSV)

If you clear **Use the export options defined in the report**, the following options are available for Crystal reports that are published as comma-separated value files:

- **Delimiter**

  Enter the character you want to use as a delimiter.

- **Separator**

  Enter the character you want to use to separate values, or select **Tab**.

- **Mode**

  Select either standard or legacy mode. Standard mode lets you control how report pages and group headers and footers display in the CSV output and is the default option.

- **Report and page sections**

  Use the options in this area to set whether report and page sections are exported, and whether to isolate report and page sections.

- **Group sections**

  Use the options in this area to set whether group sections are exported and whether to isolate group sections.

XML

If you clear **Use the export options defined in the report**, the following options are available for Crystal reports that are published in XML format:

- **XML Exporting Formats**

  Select an option on the list to specify the XML format.

10.1.16 Design tasks for Web Intelligence document publications

10.1.16.1 To specify formats for an Web Intelligence document

1. Click **Formats**.
2. On the **Document** list, select a document.
3. On the **Output Format** list, select the check boxes for the format or formats in which you want to publish the document.
4. With the format option highlighted on the **Output Format** list, in the "Output Format Details" area, choose whether to publish the entire document or one report tab in the document.
   - If you want to publish the entire document, leave **All reports** selected.
   - If you want to publish a single report tab, click **Select one report** and choose a report tab on the list.
5. Repeat step 4 for every format in which you want to publish the document.

After you finish this task for one document, you must repeat steps 2 to 5 for the other dynamic content source documents in the publication.

10.1.16.2 To personalize an Web Intelligence document using a global profile target

Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI Platform. The profile selected in this task must also have a global profile target.

The "Global Profiles" area of the "Personalization" section lets you personalize a Web Intelligence document for Enterprise recipients by filtering a global profile target.

Tip:
If you use the personalization options in the "Global Profiles" area, it is not necessary to use the personalization options in the "Filters" area.

1. Click **Personalization**.
2. In the "Global Profiles" area, choose a profile from the list in the **Enterprise Recipient Mapping** column.

   This setting maps the document to the universe field (the global profile target) that is filtered for Enterprise recipients.

If this profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.

Related Topics

- Personalization

10.1.16.3 To personalize an Web Intelligence document by filtering fields

Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI Platform.

Perform this task to personalize a Web Intelligence document by filtering a field in the document.

Note:
Static-value profile values can filter string fields in source documents only. To filter other types of fields, use expression profile values. If you map the incorrect type of field to the profile, personalization will fail.

1. On the navigation list, click **Personalization**.
2. In the "Local Profiles" area, choose a field from the list in the **Report Field** column.
3. Choose a profile from the list in the **Enterprise Recipient Mapping** column.

   This setting maps the report field to the profile values that are defined for Enterprise recipients.

   If this profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.
4. Choose a dynamic recipient source column from the list in the **Dynamic Recipient Mapping** column.

   This setting maps the field in the source document to a column in the dynamic recipient source that contains corresponding values.
5. Repeat steps 2 to 4 for every field that you want to filter.

Related Topics

- Personalization

10.1.17 Using additional publication features

The tasks in this section are optional (not required to design and schedule a publication) but can improve the performance of your publication.

10.1.17.1 Additional publication features for Crystal report publications

10.1.17.1.1 To set print options for a Crystal report in a publication

If you plan to use the default printer, ensure that the printer is installed and configured properly.

Note:
The Crystal Reports Job Server must run under an account that has sufficient privileges to access the printer you specify. See the *SAP BusinessObjects Business Intelligence Platform Administrator Guide* for more information.

You can choose to print instances in Crystal reports format each time the publication runs using the Crystal Reports Job Server's default printer or a different printer. The BI platform prints the instances after the publication is personalized but before delivery.

1. Expand **Additional Options** and click **Print Settings**.
2. On the **Documents** list, select a Crystal report that you want to print when the publication is run.
3. Select **Print Crystal reports when scheduling**.
4. Leave **Default printer** selected if you want to print to the job server's default printer; otherwise, select **Specify a printer**.
5. Enter a printer's path and name.
   - If your job server is on Windows, in the **Specify a printer** field, type \\`printserver`\`printer name`

     `printserver` is the name of your printer server, and `printername` is the name of your printer.
   - If the job server runs on Unix, confirm that the Unix is shown (not hidden), and type the print command that you usually use in the **Specify a printer** field.

     For example, type lp -d `printername`
6. Select the number of copies and choose the print page range.
7. Set the collation and page scaling options.
8. If you want to center report content on the page, select **Center the page**.
9. If the Crystal report is wide and you want it to fit on one page when it prints, select **Fit horizontal pages into one page**.

10.1.17.1.2 To set a recipient delivery rule on a Crystal report

Recipient delivery rules determine whether a publication is delivered to a particular recipient after processing and personalization.

1. Expand **Additional Options** and click **Delivery Rules**.
2. In the "Recipient Delivery Rule" area, click **Deliver individual document when condition is met** or **Deliver all documents only when all conditions are met**.

3. On the list next to each report, specify a condition that must be met for the publication to be delivered.

   The default delivery rule settings are summarized in the following table. If a report contains alerts, options that are based on alert values are also available.

Delivery rule option	Description
Always deliver	The report is always delivered to the recipient.
Never deliver	The report is never delivered to the recipient. This option is useful if you want to exclude a Crystal report from a particular publication run without redesigning the entire publication.
Deliver only if report contains data	The report is delivered to the recipient only if it contains data for that recipient after personalization. This option is useful if you want to decrease the processing load for large publications.

Related Topics
- Delivery rules
- To set a global delivery rule on a Crystal report

10.1.17.1.3 To set a global delivery rule on a Crystal report

Note:
The Crystal report that you want to set a global delivery rule for must contain an alert.

Global delivery rules determine whether a publication will be processed and delivered for all recipients. You can set a global delivery rule on any Crystal report in the BI platform.

1. Expand **Additional Options** and click **Delivery Rules**.
2. In the "Global Delivery Rule" area, click **Browse**.

   A dialog box appears and lets you select the Crystal report on which the global delivery rule will be set.
3. Browse for the Crystal report, select it, and click **OK**.

   The dialog box closes.
4. On the **Condition** list, select the alert value that the report must have for the global delivery rule to be met.

Related Topics
- Delivery rules
- To set a recipient delivery rule on a Crystal report

10.1.17.1.4 To format the merged PDF

Before you begin, ensure the following:

- The Crystal reports that you want to include in the merged PDF have titles. To set the title for a report, open the report in SAP Crystal Reports and go to **File** > **Summary Info**. On the **Summary** tab, in the **Title** field, enter a title for the report. Save the report and re-export it to the repository.
- In the "Source Documents" section, the Crystal reports and PDFs that you want to merge appear in the correct order.
- In the "Formats" section, **PDF** is selected as a format for each Crystal report that you want to include in the merged PDF.
- In the "Destinations" section, **Merge Exported PDF** is selected for each destination to which you want to send the merged PDF.

The options in the **Merged PDF Options** section let you customize the merged PDF instance generated from a Crystal report publication.

1. Expand **Additional Options** and click **Merged PDF Options**.
2. Create and format a table of contents for the merged PDF.

   Note:
   To enable this format option, in the "Formats" section, select a Crystal report on the **Documents** list. Clear **Use the export options defined in the report** and select **Create bookmarks from group tree**. Do this for each Crystal report on the list. If you do not do this, the Crystal report does not appear in the table of contents for the merged PDF.

   a. Select **Create Table of Contents**.

      The format options for the table of contents are available.

   b. In the **Title** field, enter a title for the table of contents.
   c. Format the font, font size (in points), and font color that the title and the items in the table of contents will have.

3. Set the page number format options for the merged PDF.

   a. Select **Apply Running Page Numbers**.

      The format options for page numbers are available.

   b. In the **Number Format** field, enter the format in which you want the page numbers to appear.

      By default, the format is set to Page &p of &P. You can change this format, but you must use &p as a placeholder for the current page number and &P as a placeholder for the total number of pages.

   c. On the **Number Location** list, choose the page number orientation for the merged PDF.
   d. Format the font, font size (in points), and font color that the page numbers will have.
   e. If you want the table of contents to have page numbers, select **Apply page numbers to Table of Contents pages**.

4. Set recipient logon credentials and permissions for recipient actions.

   a. In the **User Password** field, enter a password that recipients must enter to view the merged PDF.
   b. In the **Owner Password** field, enter a password that recipients must enter to edit the merged PDF.
   c. Set permissions for user actions by selecting or clearing the appropriate check boxes.

      These permissions are summarized in the following table.

Option	Description
Allow Printing	Select this option to allow recipients to print the PDF.
Allow Modification of Contents	Select this option to allow recipients to modify the PDF.
Allow Copy and Paste	Select this option to allow recipients to copy and paste PDF contents.
Allow Modification of Annotations	Select this option to allow recipients to modify annotations in the PDF.

10.1.17.1.5 To configure database logon information for a Crystal report

Before you begin, it is recommended that you ensure the database settings for the Crystal report are correct. In the "Folders" area of the CMC, select the Crystal report and go to **Manage** > **Default Settings** > **Database Configuration** to check the database information or enter new information.

In some cases, you may need to modify the data source information that a Crystal report references in the Crystal report itself. To do this, open the Crystal report in SAP Crystal Reports and go to **Database** > **Set Datasource Location**. In the "Set Datasource Location" dialog box, select a connection or create a new connection.

This task lets you modify the database logon information that recipients require to log on to the database and refresh the data in the Crystal report.

1. Expand **Additional Options** and click **Database Logon**.
2. On the **Title** list, select a Crystal report .

   The database information for that Crystal report appears below the **Title** list.
3. Ensure the information that appears in the **Database Server** and **Database** fields is correct.
4. In the **User** field, enter a user name that recipients must use to log on.
5. In the **Password** field, enter a password.

10.1.17.2 Additional publication features for Web Intelligence document publications

10.1.17.2.1 To change the prompt value for a Web Intelligence document

Note:
The document must already contain a prompt.

This task is optional. You can keep the predefined prompt value that the document contains or edit the list of prompt values.

1. Expand **Additional Options** and click **Prompts**.

   Note:
   Only Web Intelligence documents that contain prompts appear.

2. Click **Modify**.

   The "Prompts" dialog box appears.

3. Click **Refresh Values**.

   A list of possible prompt values appears in the list on the left.

4. Move the prompt value or values from the list on the left to the list on the right.
5. Click **Apply**.

   The "Prompts" dialog box closes, and the list of prompt values is updated.

10.1.17.3 To specify publication extensions

Before you use a publication extension, the extension must be deployed on any machines that run the Adaptive Processing Server. The location varies depending on the operating system.

Operating system	Location
Windows	`INSTALL DIR\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\java\lib\`
Unix	*INSTALLDIR*/sap_bobj/enterprise_xi40/java/lib/

After the extension is deployed, you must restart the Adaptive Processing Server and any other servers that host a Publishing Service.

For more information about publication extensions, see the *SAP BusinessObjects Business Intelligence Platform Java SDK Developer Guide*.

1. Expand **Additional Options** and click **Publication Extension**.
2. In the **Publication Extension Name** field, enter the name of the extension.
3. In the **Class Name** field, enter the fully qualified class name for the extension.
4. If necessary, enter a parameter in the **Parameter** field.
5. If you want the extension to be used after processing but before delivery, click the **Add** button above **Before Publication Delivery**.

   The extension is added to the **Before Publication Delivery** list.

6. If you want the extension to be used after delivery, click the **Add** button above **After Publication Delivery**.

   The extension is added to the **After Publication Delivery** list.

7. Repeat steps 2 to 6 for each extension that you want to add.

   Tip:
   Click **Move Up** or **Move Down** under each list to configure the order in which the extensions will be executed.

10.1.17.4 To configure email notification for successful or failed publication jobs

If you want to use the Adaptive Job Server defaults for email notification, the Adaptive Job Server must have been configured properly.

Perform this task if you want to receive email notification after a publication job has run.

Note:
This feature is available in the CMC only.

1. Expand **Additional Options** and click **Notification**.
2. Expand **Email Notification: Not in use**.
3. If you want to receive email notification for successful publication jobs, select **A job has been run successfully** and configure the options that appear below.
   - Click **Use the Job Server's defaults** if you want to use the Adaptive Job Server defaults.
   - Click **Set the values to be used here** if you want to use your own settings and enter your settings in the appropriate fields.
     - In the **From** field, enter an email address or a name.
     - In the **To** field, enter an email address to which the email will be sent.
     - In the **Cc** field, enter email addresses for any users whom you want to receive email notification.
     - In the **Subject** field, enter a subject line for the email.
     - In the **Message** field, enter a message that will accompany the notification email.
4. If you want to receive email notification for failed publication jobs, select **A job has failed to run** and configure the options that appear below.
   - Click **Use the Job Server's defaults** if you want to use the Adaptive Job Server defaults.
   - Click **Set the values to be used here** if you want to use your own settings and enter your settings in the appropriate fields.
     - In the **From** field, enter an email address or a name.
     - In the **To** field, enter an email address that the email will be sent to.
     - In the **Cc** field, enter email addresses for any users whom you want to receive email notification.
     - In the **Subject** field, enter a subject line for the email.
     - In the **Message** field, enter a message that will accompany the notification email.

10.1.17.5 To enable auditing notification for publication jobs

Perform this task if you want to enable auditing notification for publication jobs. For more information about auditing, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Note:
This feature is available in the CMC only.

1. Expand **Additional Options** and click **Notification**.
2. Expand **Audit Notification: Not in use**.
3. If you want to audit successful publication jobs, select **A job has been run successfully**.
4. If you want to audit failed publication jobs, select **A job has failed to run**.

10.1.17.6 To specify events

Event-based scheduling provides you with additional control over scheduling publications: you can set up events so that publications are processed only after a specified event occurs.

Perform this task if your publication job runs after an event occurs, or if your publication job triggers other events upon completion.

For more information about events, see the *SAP BusinessObjects Business Intelligence Platform User Guide*.

1. Expand **Additional Options** and click **Events**.
2. If you want to specify file-based and custom events for your publication, move them from the **Available Events** list to the **Events to wait for** list.

   These events trigger the publication job to run.
3. If you want to specify schedule events for your publication, move them from the **Available Schedule Events** list to the **Events to trigger on completion** list.

   These events occur after the publication job has run.

10.1.17.7 To set a server group option

Perform this task if you want to use a specific server to process the publication. For more information about server groups, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Note:
You cannot schedule publications across sites in federations.

1. Expand **Additional Options** and click **Scheduling Server Group**.
2. Choose a server group option.

Option	Description
Use the first available server	The publication job is processed by the first available server with sufficient capacity. This option is selected by default. **Note:** This is the only available option if no server groups exist in the CMC.
Give preference to servers belonging to the selected group	The publication job first tries to run using the servers in the server group you specify. If these servers have insufficient capacity, the publication then tries to run using the servers in other server groups. When you choose this option, you also must choose a server group on the list of available server groups.
Only use servers belonging to the selected group	The publication job only uses the servers in the server group you specify. When you choose this option, you also must choose a server group on the list of available server groups.

10.1.17.8 To specify a profile resolution method

The profile resolution method you specify determines whether instances will be merged or delivered as separate documents if a profile conflict occurs.

1. Expand **Additional Options** and click **Advanced**.
2. Under **Profile Resolution Method**, click **Merge** or **Do not merge**.

10.1.17.9 To specify a report bursting method

The report bursting method you specify determines how the source documents are personalized, processed, and delivered.

1. Expand **Additional Options** and click **Advanced**.
2. Click one of the options under **Report Bursting Method**.

Note:
If your publication is intended for dynamic recipients only, **One database fetch per recipient** is unavailable.

Caution:

Choose your report bursting method carefully if your publication meets the following criteria:

- The publication contains Web Intelligence documents intended for Enterprise recipients.
- The profiles that are used for personalization have filter expressions.

Different report bursting methods use different filter types to personalize and process the documents. **One database fetch for all recipients** uses a report filter; **One database fetch per recipient** uses a query filter. Each filter type in turn supports a different set of operators. If the filter expression uses an operator that the report bursting method does not support, the publication may fail.

Related Topics

• Report bursting

10.2 Post-design publication tasks

Tasks in this section are optional and can be performed after the publication design process.

10.2.1 Finalizing the publication

At any point during or after the design process, use the "Summary" page to view a summary of the publication's properties: the publication's title, location, description, source documents, you how many recipients will receive the publication according to recipient type (Enterprise or dynamic), how the publication is personalized, the distribution format and destination.

To access the "Summary" page, click **Summary**. You can use the other options on the navigation list to change the properties, or save the publication and schedule it.

10.2.2 To test a publication

Test mode allows you to test a publication by sending it to yourself before sending the publication to its actual recipients. You will receive the same information that recipients receive. The destinations are automatically updated so that your BI Inbox or your email address is used instead of those belonging to the publication recipients. You can also exclude some recipients from the original group of recipients for test mode.

1. Click **Test Mode**.
2. If necessary, modify the list of Enterprise recipients.
   a. Click **Enterprise Recipients**.
   b. Under "Email Recipients", in the **To** field, enter your own email address.

      This field only appears if your publication is intended for an email destination. BI platform sends all email publication instances generated during test mode to the email address you specify here.
   c. Move users or groups from the **Available** list to the **Selected** list or **Excluded** list.
3. If necessary, modify the list of dynamic recipients.
   a. Click **Dynamic Recipients**.
   b. Under "Email Recipients", in the **To** field, enter your own email address.

      This field only appears if your publication is intended for an email destination. BI platform sends all email publication instances generated during test mode to the email address you specify here.
   c. Ensure the columns that are mapped to recipient IDs, full names, and email address are correct.
   d. Select or clear **Use entire list**.
   e. If **Use entire list** is cleared, move the users or groups that you want to include or exclude from the **Available** list to the **Selected** list or **Excluded** list.
4. Click **Test**.

   The publication is run in test mode.

10.2.3 To subscribe to or unsubscribe from a publication

Enterprise recipients with the appropriate rights can subscribe to or unsubscribe themselves from a publication. They can also do this with publication instances. For instance, if a publication is scheduled to run twice a week, recipients can subscribe to the first publication instance but not the second.

Note:
Dynamic recipients cannot subscribe and unsubscribe themselves automatically.

1. Browse for the publication and select it.
2. Subscribe to or unsubscribe from the publication by doing one of the following:
   - If you are in the CMC, click **Actions** > **Subscribe** or **Actions** > **Unsubscribe**.
   - If you are in BI launch pad, click **More Actions** > **Subscribe** or **More Actions** > **Unsubscribe**.

Tip:
To subscribe to or unsubscribe from publication instances, select the publication and click **Actions** > **History** in the CMC or**More Actions** > **History** in BI launch pad. In the "History" window, select an instance and subscribe to it or unsubscribe from it.

10.2.4 To schedule a publication to run

After you have designed a publication and saved it, you can schedule it to run.

When you schedule the publication, you can use the settings that you made in the "Recurrence" section, or you can enter new settings. You can also change the recipients each time you schedule a publication.

1. Close the publication design page.
2. Select the publication.
3. Click **Actions** > **Schedule** if you are in the CMC, or **More Actions** > **Schedule** if you are in BI launch pad.
4. Ensure that the recurrence information is correct.
5. Click **Schedule**.

   The publication is run as specified.

Tip:
If you want to view the progress of the publication job as it is running, click **Actions** > **History** if you are in the CMC, or **More Actions** > **History** if you are in BI launch pad. In the **Status** column, click the status (Success, Failed, or Running), and then click the **View Log File** link at the bottom of the "Publication History" dialog box.

Related Topics

• To choose a recurrence pattern
• To schedule an object with parameters or prompts

10.2.5 Viewing publication results

Viewing publication results as a publisher

You can view the results of a publication in various ways. When the publication runs, you are taken to the publication history, which lists publication instances, the times at which the publication was run, and whether the publication succeeded or failed. In the **Instance Time** column, you can click the link for a publication instance to view the instances that were generated for all recipients when the publication was run at that time.

Tip:
To access the publication history at any time, select the publication and go to **Actions** > **History** in the CMC or **More Actions** > **History** in BI launch pad.

Viewing log files for publication jobs

Log files are useful if you need to troubleshoot a publication or identify which recipients did not receive publication instances. BI platform logs the publication job details as each batch of personalized publication instances is processed, and then consolidates these details into one or more log files. The maximum log file size is 10 MB and is non-configurable. If you run a high-volume publication with many details, the publication instance can have several log files.

You can view log files for a publication instance in two ways:

- To view the last log file in a series, click **Actions** > **History**. In the **Status** column, click the status (Success, Failed, or Running), and then click the **View Log File** link at the bottom of the "Publication History" dialog box.

  Tip:
  You can also do this as the publication is running.

- To view all log files, click **Actions** > **History**. In the **Instance Time** column, click the link for a publication instance. The log files are listed after the personalized instances.

Log files are updated with new details every two minutes. If your publication job has been running less than two minutes, the log file may have a status of Pending.

Viewing publication results as a recipient

The ways in which you can view a publication are summarized in the following table.

<table>
<tr><th>Destination</th><th>How to view the publication result</th></tr>
<tr><td>Default Enterprise location</td><td>As a recipient, you can view only your personalized publication instance inBI platform. You cannot view publication instances that have been personalized for other recipients.

Note:
Dynamic recipients cannot log into BI platform to view publication results.

1. Launch the CMC.
• In Windows, go to Start > Programs > SAP BusinessObjects BI platform 4.0 > SAP BusinessObjects BI platform > SAP BusinessObjects BI platform Central Management Console .
• Alternatively, open your web browser and type the following:
http://servername:connectionport/CMC
Here servername represents your CMS name and connection port represents the connection port number that was specified during installation. The default connection port number is 8080.
2. Enter your logon credentials.
• In the System field, ensure the CMS name and CMS port are correct.
• Enter your user name and password.
• On the Authentication list, select the authentication type.
3. Click Log On.
4. Go to the "Folders" area, navigate to the publication, and select it.
5. Click Actions > History.
6. Click the link in the Instance Time column.
7. Double-click the instance that you want to view.</td></tr>
<tr><td>BI Inbox</td><td></td></tr>
</table>

Destination	How to view the publication result
	Note: Dynamic recipients cannot log onto BI launch pad to view publication results. 1. Launch BI launch pad. • In Windows, go to **Start** > **Programs** > **SAP BusinessObjects BI platform 4.0** > **SAP BusinessObjects BI platform > SAP BusinessObjects BI platform Java BI launch pad** . • Alternatively, open your web browser and type the following: http://*servername*:*connectionport*/BOE/BI Here *servername* represents your CMS name and *connection port* represents the connection port number that was specified during installation. The default connection port number is 8080. 2. Enter your logon credentials. • In the **System** field, ensure the CMS name is correct. • Enter your user name and password. • On the **Authentication** list, select the authentication type. 3. Click **Log On**. 4. Click **My Inbox**. 5. Double-click the instance that you want to view.
Email	Log on to your email to view the embedded publication content or download the attachment or attachments.
FTP server	Log on to your FTP host.
Local disk	Navigate to the location that was specified when the publication was designed.

10.2.6 To redistribute a publication instance

You can redistribute successful publication instances to Enterprise and dynamic recipients that were specified for the original publication run. This feature is useful if you want to resend an instance to a recipient but you do not want to rerun the entire publication.

1. Browse for the publication and select it.
2. Click **Actions** > **History** if you are in the CMC, or **More Actions** > **History** if you are in BI launch pad.

   The history of the publication is displayed.
3. Select a successful publication instance.

4. Click **Actions** > **Redistribute** if you are in the CMC, or **More Actions** > **Redistribute** if you are in BI launch pad.
5. Choose the recipients who will receive redistributed instances.

   Note:
   Only recipients that were specified when the publication was run originally can receive redistributed instances.

   - If you want to redistribute an instance to an Enterprise recipient:
     a. Expand **Enterprise Recipients**.
     b. Move the Enterprise recipient from the **Available** list to the **Selected** list.
   - If you want to redistribute an instance to a dynamic recipient:
     a. Expand **Dynamic Recipients**.
     b. Ensure the columns that are mapped to recipient IDs, full names, and email addresses are correct.
     c. If you want to redistribute the publication to all dynamic recipients, select **Use entire list**; otherwise, clear it.
     d. Move the dynamic recipient from the **Available** list to the **Selected** list.
6. Click **Redistribute**.

   The history of the publication is displayed, and the instance that you chose to redistribute has a status of Running. The date displayed in the **Instance Time** column is updated to reflect the redistribution time.

10.2.7 To retry a failed publication

Before you begin, it is recommended that you view the log file for the failed publication instance, address any errors, and reschedule the publication.

1. Select the publication that has the failed publication instance.
2. Click **Actions** > **History** if you are in the CMC, or **More Actions** > **History** if you are in BI launch pad.

   The publication history is displayed.
3. Select the failed publication instance.
4. Click **Actions** > **Retry** if you are in the CMC, or **More Actions** > **Retry** if you are in BI launch pad.

   The instance status changes to Running.

If your publication fails again, refer to the new log file and fix any errors that occurred.

10.3 Improving publication performance

Adaptive Processing Server

If both CPU and memory for the Adaptive Processing Server are heavily utilized during publication runs:

- Move the Adaptive Processing Server to a faster machine that has more available CPUs and SAP BusinessObjects Business Intelligence platform 4.0 Feature Pack 3 or later installed. The server will automatically scale to use more CPUs.
- Isolate the Publishing Service and the Publication Post Processing Service on dedicated Adaptive Processing Server instances and remove unused services hosted on the server. Each service will consume more shared resources (request thread pool, memory, and CPU consumption) on the Adaptive Processing Server, and publishing performance may improve.

Publishing Service

- In deployments where many publication instances execute concurrently—if the underlying CMS, FRS, Adaptive Job Server, and report processing servers have been scaled appropriately—horizontally "scaling out" the Publishing Service across multiple Adaptive Processing Server instances (on one or multiple machines) will enable more publication instances to be processed concurrently.

  In contrast, a single publication job (for example, one with 1,000,000 recipients) is not shared across Publishing Services hosted on different Adaptive Processing Servers. Horizontally scaling out the Publishing Service will not improve processing time for a single publication, regardless of the number of recipients.

- For publications with many recipients, vertically scale the Adaptive Processing Server on machines that have more CPUs and RAM. This will enable the Publishing Service to concurrently process more recipients and the Adaptive Processing Server to generate more jobs. The Adaptive Job Server and report processing servers may need to be scaled accordingly to increase throughput.

  Note:
  You may need to increase the Adaptive Processing Server heap size (that is, set `-Xmx` to 2 GB or more) when the server runs on a machine that has more than eight CPU cores. The larger number of CPU cores will enable the Adaptive Processing Server to spawn more threads and increase throughput. Note that more threads will require more RAM.

- Because publishing is a disk-heavy process, use a machine with fast I/O or SAN disks for the FRS.
- Use the publishing cleanup option. For a large publication that does not need redistribution or to view artifacts in the report, do not select the default destination.
- (Crystal report publications) Select **One database fetch for each batch of recipients** if you do not need to apply unique refresh security for each recipient. Database access will be batched into multiple concurrent, smaller queries.
- (Web Intelligence publications) Select **One database fetch for all recipients** or **One database fetch per recipient**. When you select **One database fetch for all recipients** for a large publication, to break up the database query into multiple smaller atomic queries, enter `-Dcom.businessobjects.publisher.scopebatch.max.recipients=<integer>` on the command line of all Adaptive Processing Servers that host the Publishing Service.

- For large publications, disk delivery to a single folder on Windows can slow overtime. The workaround is to disable short file-name generation. For instructions, see http://support.microsoft.com/kb/210638 and http://technet.microsoft.com/en-us/library/cc778996%28WS.10%29.aspx. For information about disabling short file-name generation when a single folder contains more than 300 KB of files, see http://technet.microsoft.com/en-us/library/cc781134(WS.10).aspx.

Publishing Post Processing Service

The Publishing Post Processing Service is called when the **Package as ZIP File** check box ("Schedule" page) and/or the **Merge Exported PDF** check box ("Destinations" page) is selected or when custom post-processing plugins are enabled on a publication. For publications with both check boxes selected, you must create additional Publishing Post Processing Services to improve publication processing time. However, the amount of work the Publishing Post Processing Service receives is limited by how the Publishing Service is scaled.

Horizontally scaling out the Publishing Post Processing Service spreads the ZIP- and PDF-merging workload across multiple Publishing Post Processing Services hosted on different Adaptive Processing Servers.

10.3.1 Recommendations for adding source documents

This section contains recommendations for adding dynamic content documents in publications.

Use publication log files to troubleshoot errors in failed publications.

When you schedule publications to run, log files are generated that record any errors that may occur when the publications are processed. To view all log files for a publication instance, click **Actions** > **History**. On the "History" page, click the instance link in the **Instance Time** column.

If you are using parameter-based personalization for Crystal reports, set parameters to default.

Parameter-based personalization may lead to slower publication performance. It is highly recommended that you personalize Crystal report publications by mapping fields to Enterprise recipient profiles or to dynamic recipient personalization values. However, if you need to personalize Crystal reports using parameters, in the "Personalization" section, set parameters to **Default**.

Note:
Before you can use Enterprise recipient profiles, your system administrator must configure the profiles in BI platform.

View and schedule dynamic content documents individually before you add them to a publication.

If you can view and schedule dynamic content documents successfully, the data source connection is working properly and the source document data can be refreshed when the publication is scheduled. If you cannot view and schedule dynamic content documents, ensure the data source connection settings are correct. The following table summarizes how to check the settings.

Document type	How to check data source connection settings
Crystal report	In the CMC, select the Crystal report and go to **Manage** > **Default Settings**. In the "Default Settings" dialog box, click **Database Configuration** on the navigation panel.
Web Intelligence document	In the CMC, select the Web Intelligence document and go to **Manage** > **Default Settings**. In the "Default Settings" dialog box, click **Report Universes** on the navigation panel.

In some cases, you may have to open the dynamic content document in the appropriate designer to configure the data source connection and re-export the file to the CMS repository to overwrite the previous copy. For more information about configuring data source connections for dynamic content documents, refer to the documentation for the designer.

Avoid unnecessary data refreshes.

If a data refresh is unnecessary for a dynamic content document, in the "Source Documents" section, clear the **Refresh At Runtime** check box for that document. This will improve overall publication performance.

10.3.2 Recommendations for using dynamic recipient sources

This section contains recommendations for using dynamic recipient sources.

Sort dynamic recipient sources according to the recipient ID column.

In general, it is recommended that you sort dynamic recipient sources according to the recipient ID column. This is especially important when you are running a high-volume publication or when you enable **One database fetch for each batch of recipients** because it can reduce the number of deliveries for recipients who have multiple personalization values.

For Crystal report dynamic recipient sources, ensure the database configuration information is correct.

In the CMC, select the dynamic recipient source and go to **Manage** > **Default Settings** to ensure the following:

- In the "Database Configuration" section, the database logon information is correct and **Use same database logon as when report is run** is selected.
- In the "Parameters" section, all parameters have parameter values, and all **Prompt when viewing** check boxes for parameters are cleared.

If you use Crystal report dynamic recipient sources, consult your administrator to ensure the Report Application Server (RAS) is configured correctly.

The RAS must be configured to read at least the same number of database records as the number of recipients in the dynamic recipient source. For instance, to process a dynamic recipient source with data for 100,000 recipients, the RAS must be set to read more than 100,000 database records.

10.3.3 Recommendations for sending and receiving email publication instances

This section contains recommendations for email publication instances.

If possible, view embedded content email publication instances in Outlook 2003.

Embedded content in email publication instances may have formatting issues when viewed in Outlook 2007 or in web email accounts such as Hotmail or Gmail.

Consult your administrator to ensure that the email settings are configured properly for the Destination Job Server.

Publications that are intended for email destinations may fail because email has not been configured properly as a destination for the Adaptive Job Server. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Working with Alerting

11.1 Alerting

Alerting is a feature that spans different applications in BI platform. Alerts notify users and administrators when events are triggered. Alerting lets you manage objects and events on the basis of exception. Alerts notify you about changes.

For example, Julie works at an auto insurance company and tracks the number of claims filed using a Crystal report. She subscribes to the Claim Number alert, and chooses to receive her alert notification by email. The report runs daily. After a week, the number of auto insurance claims reaches 10,000, meeting the alert's condition and triggering the alert. Julie receives an email notification and realizes that auto insurance claims have increased dramatically. She informs her manager and recommends launching a campaign to promote safer driving habits.

Subscribing to alerts

In BI platform, users and administrators can subscribe to alerts using the Central Management Console (CMC) or BI launch pad.

Enabling alerts

When new reports are created, report designers enable alerts. As events are triggered, notifications are sent to the subscribers' email addresses or a BI system destination (for example, a BI launch pad account).

Viewing alert notifications

In BI platform, users and administrators view notifications in BI launch pad or their email.

Right-click on an alert and select **See More**. The Alert information window appears showing the title, message and trigger time.

Managing alerts

Content administrators and power users manage alerts in the CMC or BI launch pad. System administrators manage alerts in CMC and control user access by assigning rights.

11.1.1 Available alerting object sources

Object	Description
Crystal reports	Crystal reports can contain multiple alerts. When you add a report containing alerts to the repository, BI platform automatically creates event objects that correspond to each alert in the report. In the Central Management Console, these events are listed in the `Crystal Reports Events` folder, in the **Events** area. You can also search for them using the **Content Search** option. **Note:** Only reports created in BI platform support alerting and allow users to subscribe to alert notifications when the reports are added. To subscribe, navigate to the report and perform the subscription task on the report object.
Events (file-based, schedule-based, and custom)	You can enable alerting for any event.

Note:

- Monitoring uses alerting to notify system administrators of changes in the overall health of the system. Alerts based on monitoring probes can be found in the `Monitoring Events` folder, in the **Events** area. For more information about monitoring, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide* at http://help.sap.com.
- Objects created in applications such as Information Steward and Event Insight also use alerting. For more information, see the documentation for the application.

Related Topics

• Locating alert source objects in BI launch pad

11.1.2 Differences between alerting and Crystal report alert notifications

In previous versions of BI platform, you could configure alert notifications for Crystal reports when you scheduled them. BI platform still supports this functionality for reports created in Crystal Reports. The following table summarizes the key differences between the previous alert notification functionality and alerting.

Key differences	Crystal report alert notications	Alerting
Supported objects	Reports created in SAP Crystal Reports	• Reports created in SAP Crystal Reports only • Events • Monitoring probes • Information Steward alerts • Event Insight alerts
Supported destinations	Email only	• **My Alerts** in BI launch pad • Email
Usage	You configure this functionality when you configure scheduling for a Crystal report. All recipients' email addresses must be entered manually. Recipients can include Enterprise users and users who do not have BI platform accounts.	You subscribe to alert notifications from the alert source, and change subscriptions as needed. Recipients can include Enterprise users and users who do not have BI platform accounts. You must enter email addresses manually for users without accounts.

11.1.3 Alerting workflow

The alerting workflow involves various steps, applications, and types of users.

The Alerting workflow for Crystal reports

1. The report creator designs a report that contains alerts in SAP Crystal Reports for Enterprise.
2. The report creator or a content administrator adds the Crystal report to a folder in the "Folders" or "Personal Folders" area of the Central Management Console (CMC). When the report is added, the system automatically creates report event objects based on the alerts in the report.
3. The user logs on to the CMC or BI launch pad, navigates to the Crystal report, and subscribes to the alert.
4. The report creator or a content administrator schedules the Crystal report to run. If the alert condition is met, the alert is triggered and the user receives notification according to their subscription settings.

The Alerting workflow for events

1. The content administrator creates an event in the CMC and enables Alerting on the new event.
2. The user sees the alert in the "Events" area of the CMC, or searches for the alert by name in BI launch pad, and subscribes to it.
3. The event occurs, triggering the alert.
4. The user receives notification that the event has occurred according to their subscription settings.

11.1.4 Rights required for Alerting

Depending on your role in the Alerting workflow and your responsibilities, the rights you need may vary. The following tables summarize the rights required for common Alerting tasks.

Table 11-2: Working with document alerts

Role	Task	Rights required
User	Subscribe to a document alert	• View right on the document • View right on the corresponding event • Subscribe right on the user's own account **Note:** If the user intends to view an instance using a document link in the alert notification, the user also requires the View Instance right on the document.
User	Unsubscribe from a document alert	• View right on the corresponding event • Subscribe right on the user's own account
User	Receive notification for a document alert	• View right on the corresponding event • View right on the document
Content administrator	Manage destination and parameter settings for a document alert	• Edit right on the document • Edit right on the event
Content administrator	Manage Alerting settings for a document	• View and Edit rights on the document • View and Edit rights on the corresponding event • View and Subscribe rights on any users or groups to be added as subscribers **Note:** If you want to add a user group to the list of subscribers, you must have View and Subscribe rights on the user group object. Having View and Subscribe rights on individual users within the group is insufficient.

Role	Task	Rights required
Content administrator	Unsubscribe a user from a document alert	• View right on the document • View right on the corresponding event • View and subscribe rights on the user
Content administrator	Trigger a document alert	• View and Schedule rights on the document • View and Trigger rights on the corresponding event

Table 11-3: Working with event alerts

Role	Task	Rights required
User	Subscribe to an event alert	• View right on the event • Subscribe right on the user's own account **Note:** By default, Subscribe rights are granted to users on their own accounts.
User	Unsubscribe from an event alert	• View right on the event • Subscribe right on the user's own account **Note:** By default, Subscribe rights are granted to users on their own accounts.
Content administrator	Manage Alerting settings for an event	• View and Edit rights on the event • View and Subscribe rights on any users or groups to be added as subscribers **Note:** If you want to add a user group to the list of subscribers, you must have View and Subscribe rights on the user group object. Having View and Subscribe rights on individual users within the group is insufficient.
Content administrator	Trigger an event	• View and Trigger rights on the event

Table 11-4: Working with alert notifications

Role	Task	Rights required
User	Receive an alert notification	• View right on the corresponding event
User	Mark an alert notification as read or unread	• View right on the alert notification • Subscribe right on the user account
User	Reread an alert notification	• View right on the alert notification
User	Delete an alert notification in BI launch pad	• View right on the alert notification • Subscribe right on the user account

11.2 Alerting tasks

11.2.1 Locating alert source objects in BI launch pad

How you view alert sources depends on the object type of the alert source. The following table summarizes where alert sources are located.

Object type (alert source)	Locating the object
Crystal report	Crystal reports can be stored in personal or public folders. Depending on where the report is located, do one of the following: • To view a Crystal report in your personal folder, in the Documents tab, click the **My Documents** drawer in the Navigation panel, and then click the **Favorites** node. The Crystal report appears in the List panel. • To view a Crystal report in a public folder, in the Documents tab, click the **Browse Folders** drawer and navigate to the folder containing the report.
Event (file-based, schedule-based, and custom)	You can search for Alerting-enabled events by name.

Tip:
If you already subscribe to an alert, you can view it quickly by going to the Documents tab, expanding the **My Documents** drawer, and selecting **Subscribed Alerts**.

11.2.2 To subscribe to an alert

1. Locate and select the alert source, and click **More Actions** > **Subscribe**.
   The "Subscribe to Publication" page appears.
2. Choose a destination:

Option	Description
My Alerts	Sends the alert notification to a destination in the Business Intelligence system (for example, BI launch pad)
Email	Sends the alert notification to the email address specified for your user account in BI platform **Note:** • This destination is available only if an email address was specified for your user account. • Ensure that your email address is valid and entered correctly; otherwise, you will not receive the alert notification.

3. Specify the personalization parameter(s) and the alert type.
4. For Crystal reports that contain multiple alerts, choose which alert to subscribe to.
   Depending on the alert source, you may need to configure additional settings.

5. Click **OK**.

The next time the alert is triggered, a notification will be sent to the destination you selected. To change which destinations the alert notification will be sent to, on the **Documents** tab, expand the **My Documents** drawer, and click **Subscribed Alerts**. In the list panel, choose the alert source and click **More Actions** > **Modify Subscription**. You can also use **More Actions** > **Modify Subscription** to modify your subscription to multiple Crystal report alerts from the same report or to edit parameters for EDBI alerts.

Notifications are sent using the destination defaults set for Alerting in the CMC, unless you specified custom settings for the alert source.

Related Topics

• Locating alert source objects in BI launch pad

11.2.3 To unsubscribe from an alert

Follow these steps to unsubscribe from an alert:

1. In the Documents tab, expand the **My Documents** drawer and click the **Subscribed Alerts** node.
2. Select the alert you would like to unsubscribe from.
3. Click **More Actions** > **Unsubscribe**.
4. When prompted for confirmation, click **Unsubscribe**.

11.2.4 To subscribe others to an alert

Perform this task if you want to subscribe other users to an alert.

1. Locate and select the alert source.
2. Click **More Actions** > **Manage Subscribers**.

   The "Manage Subscribers" dialog box appears.
3. Ensure **Subscriber List** is selected on the navigation pane.
4. If you want to add new subscribers, do the following:
   a. Click **Add**.
   b. In the "Add" dialog box, move users and groups from the **Available** list to the **Subscribed** list, and click **Add Default Subscription(s)**.
   c. Configure other Alerting settings as required.

      For example, you can modify which alerts to subscribe to (if the alert source contains multiple alerts) and the destinations. Depending on the alert source, other settings may be available.

5. If you want to edit settings for a subscriber, do the following:
   a. Select a subscriber on the "Subscriber List" and click **Edit**.

      The "Edit Subscriptions" dialog box appears.
   b. If you want to edit which alerts the subscriber will receive, click **Alerts** on the navigation list and select the relevant alerts.

      If the alert source contains multiple alerts, they are all listed here; otherwise only one alert appears.
   c. If you want to edit which destinations an alert will be sent to, click **Destinations** on the navigation list and select the relevant destinations.

      If the email destination has been enabled and configured on the Adaptive Job Server, it will be available; otherwise, only **My Alerts** is available.

      Note:
      Depending on the alert source, you may have to configure additional settings.
   d. Click **Save & Close** to return to the **Subscriber List**.
6. After you have made all your changes, in the "Manage Subscribers" dialog box, click **Save & Close**.

Related Topics

- Locating alert source objects in BI launch pad

11.2.5 To exclude users from an alert

Perform this task if you want to exclude users from an alert. Excluding users is useful if you want to subscribe most of the users in a group but not all of them. Instead of subscribing users individually, you can subscribe the entire group and exclude only the users who do not want to receive alert notifications.

Note:
Being on the **Excluded** list overrides all other subscription settings for a user.

1. Navigate to the alert source.

   For more information, see Locating alert source objects in BI launch pad.
2. Click **More Actions** > **Manage Subscribers**.

   The "Manage Subscribers" dialog box appears.
3. Ensure **Excluded List** is selected on the navigation pane.
4. Move users from the **Available** list to the **Excluded** list.
5. Click **Save & Close**.

11.2.6 To manage Alerting settings for an alert source

Usually, notifications are sent using the default destination settings set for the Alerting application. Perform this task if you want to specify custom settings for an alert source.

1. Navigate to the alert source.

   For more information about this task, see Locating alert source objects in BI launch pad.
2. Click **More Actions** > **Manage Alerting Settings**.

   The "Manage Alerting Settings" dialog box appears.
3. To enable BI launch pad as a destination, select **Enable My Alerts**.

   This option allows alert notifications to be sent to subscribers' BI launch pad accounts and allows subscribers to view them under **My Alerts**.
4. To enable email as a destination, select **Enable Email**, and then choose whether to use default or custom email settings.

   The default settings are those set for **Alerting** in the "Applications" area. For custom email settings, set the following options, if applicable:
   - **From**
   - **To**
   - **Cc**
   - **Bcc**
   - **Subject**
   - **Message**
   - **Add Attachment**
   - "File Name" (**Automatically Generated** or **Specific Name**)
5. Click **Save & Close**.

11.2.7 Viewing alert notifications

Alert notifications can be sent to a destination in BI launch pad or to subscribers' email addresses. In BI launch pad, you can view alert notifications:

- If your administrator has set the **Home** tab to be your default view. Select **Unread Alerts** to display a list of your last 10 unread alert notifications.
- On the **Documents** tab. Click the **My Documents** drawer in the navigation pane, and select **My Alerts**. Your alert notifications appear in the **List** panel.

You can view an "Alert Information" window that shows the alert message and when the alert was triggered. There are three ways to go the "Alert Information" window:

- On the **Home** tab, click a notification under **Unread Alerts**.
- On the **List** panel of My Alerts, double-click an alert title.
- On the **List** panel of My Alerts, right-click an alert title and choose **See More**.

Working with Applications

12.1 Working with applications in BI launch pad

BI launch pad provides an integration point between the repository and various SAP BusinessObjects applications. From BI launch pad, you can launch an application and create, view, or edit corresponding objects, then save your changes or your new objects directly to the repository. Examples of applications that integrate with BI launch pad include:

- BI workspaces
- SAP Crystal Reports for Enterprise
- SAP BusinessObjects Analysis, edition for OLAP
- Web Intelligence

The applications that are available, and the tasks that you can perform in them, depend on your license type and the rights that your system administrator has given you.

12.2 To launch an application in BI launch pad

- On the **Home** tab, click the application in the "My Applications" module.
- On the header panel, click **Applications** and click the application.

The application you selected opens in a new dialog box.

12.3 BEx Web applications in BI launch pad

BEx Web applications are Web-based applications from the Business Explorer (BEx) of SAP NetWeaver Business Warehouse (BW) for data analysis, reporting, and analytical applications on the Web.

The Business Explorer is the SAP NetWeaver Business Intelligence suite, which provides flexible reporting and analysis tools for strategic analyses and decision-making support within a business. These tools include query, reporting, and analysis functions. As an employee with access authorization, you can evaluate historical or current data at various levels of detail and from different perspectives, both on the Web and in Microsoft Excel. Users access the data from the SAP NetWeaver Portal or from BI launch pad in the BI platform.

To open BEx Web applications from BI launch pad, your system administrator must first configure a BI platform server and a connection to a BW system. Authors of BEx Web applications format data from SAP NetWeaver BW in the BEx Web Application Designer using Web items (analysis, filter pane, chart, map, document, and so on).

Users can then open the BEx Web applications in BI launch pad, navigate in the data and save the navigational state of the BEx Web applications as bookmarks in the web browser favorites.

Tip:
The authors can access the BEx Web applications in BI launch pad directly from the BEx Web Application Designer by choosing **Execute** in the toolbar.

For more information about BEx Web application features, go to the SAP Help Portal at http://help.sap.com. On the SAP Help Portal, go to **SAP NetWeaver 7.3** > **SAP NetWeaver Library: Function-Oriented View** > **Business Warehouse** > **SAP Business Explorer** > **BEx Web** > **Analysis & Reporting: BEx Web Applications**.

12.3.1 To access Business Explorer Web applications in BI launch pad

1. Log on to BI launch pad.
2. Access BEx web applications, using one of the following methods:
   - On the **Home** tab, click **BEx Web Applications** in the My Applications module.
   - On the **Documents** tab, click **New** > **BEx Web Applications**.
   - On the header panel, click **Applications** > **BEx Web Applications**.

   A **BEx Web Applications** tab is created and an "Open" dialog box appears.
3. Log on to the BW system.
4. In the "Open" dialog box, select the required BEx web template.

   Note:
   You can only select BEx web templates with data sources that are stored in the BW master system. Your system administrator defines which BW system is configured as the BW master system in BI platform.

The BEx Web application opens and you can navigate the data.

Note:
You cannot use information broadcasting in BI launch pad. Information broadcasting requires SAP NetWeaver components such as the Enterprise portal and Knowledge Management. You can use information broadcasting only in BEx web applications that run in a SAP NetWeaver landscape (not with BI platform).

12.3.2 To save Business Explorer Web applications as bookmarks

You have opened a BEx Web application in the BI launch pad, navigated in the data and now want to save a particular navigational state in the Web application for later use.

Authors of BEx Web applications have configured the corresponding Web templates as follows:

- In the BEx Web Application Designer they have activated the **Bookmark** parameter (MENU_BOOKMARK) in the **Context Menu** Web item.
- Alternatively, they have implemented the **Save Bookmark** command (SAVE_BOOKMARK) in the Web template.

1. In the context menu for the BEx Web application, click **Distribute and Export** > **Bookmark**.

   Note:
   Depending on the configuration of the BEx Web application, you can find the **Bookmark** command either in the context menu or as a pushbutton.

2. Save the BEx Web application in the required folder in your web browser favorites.

You have saved the BEx Web application as a bookmark in your web browser favorites. You can access this later or send it as a link to other users.

Note:
Note that you have to log on to the BW system to access the bookmark again.

For more information about BEx Web Application Designer, Web items and Web Design API commands, go to the SAP Help Portal at http://help.sap.com. On the SAP Help Portal, go to **SAP NetWeaver 7.0 (2004s)** > **SAP NetWeaver Library** > **SAP NetWeaver By Key Capability** > **Information Integration by Key Capability** > **Business Intelligence** > **BI Suite: Business Explorer** > **BEx Web** > **Web Application Design: BEx Web Application Designer** > **Web Design API**.

More Information

Information Resource	Location
SAP product information	http://www.sap.com
SAP Help Portal	http://help.sap.com/businessobjects Access the most up-to-date English documentation covering all SAP BusinessObjects products at the SAP Help Portal: • http://help.sap.com/bobi (Business Intelligence) • http://help.sap.com/boepm (Enterprise Performance Management) • http://help.sap.com/boeim (Enterprise Information Management) Certain guides linked to from the SAP Help Portal are stored on the SAP Service Marketplace. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative. To find a comprehensive list of product documentation in all supported languages, visit:http://help.sap.com/boall.
SAP Support Portal	http://service.sap.com/bosap-support The SAP Support Portal contains information about Customer Support programs and services. It also has links to a wide range of technical information and downloads. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
Developer resources	http://www.sdn.sap.com/irj/sdn/bi-sdk-dev https://www.sdn.sap.com/irj/sdn/businessobjects-sdklibrary
SAP BusinessObjects articles on the SAP Community Network	http://www.sdn.sap.com/irj/boc/articles These articles were formerly known as technical papers.

Information Resource	Location
Notes	https://service.sap.com/notes These notes were formerly known as Knowledge Base articles.
Forums on the SAP Community Network	https://www.sdn.sap.com/irj/scn/forums
Training	http://www.sap.com/services/education From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style.
Consulting	http://www.sap.com/services/bysubject/businessobjectsconsulting Consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in topics such as relational and multidimensional databases, connectivity, database design tools, and customized embedding technology.

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