



Crystal Reports Server 2008 V1 Getting Started Guide

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Introduction to Crystal Reports Server 2008 V1



chapter

What is Crystal Reports Server 2008 V1?

Crystal Reports Server 2008 V1 is an end-to-end reporting solution that enables you to create, manage, and deliver Crystal reports over the web. Built on SAP BusinessObjects Enterprise technology Crystal Reports Server 2008 V1 includes a report publisher, a web portal interface that displays reports, and Software Development Kit (SDK) that allows you to customize Crystal Reports Server 2008 V1 and integrate it with your custom applications.

Crystal Reports Server 2008 V1 can be installed on a single system for up to 20 end-users to concurrently access, view, and interact with reports on the web. It also allows you to store the reports in a central database and access the reports through a web portal and hence providing security and data integrity.

In addition, Crystal Reports Server 2008 V1 allows you to set up security to control access to specific folders and reports. You can also specify the rights for users or groups, to schedule and export reports.

Who is Crystal Reports Server 2008 V1 for?

Crystal Reports Server 2008 V1 is ideal for organizations that need to deliver reports over the web to smaller audiences. It does not require multiple servers and complicated configurations. All the components of Crystal Reports Server 2008 V1 are installed on a single server. This feature facilitates quick installation and configuration, and allows you to start using the software immediately.

The setup allows you to start using the software to increase the report development productivity and data security immediately.

About this documentation

This document describes how to use Crystal Reports Server 2008 V1. It also includes an overview of Crystal Reports Server 2008 V1, along with information on how it is built on the proven Business Intelligence platform, SAP BusinessObjects Enterprise.

For information on working with Crystal Reports, see *Crystal Reports 2008 User's Guide* available at <http://help.sap.com/>

Who should read this documentation

This document is intended for users who work with objects over the web through Crystal Reports Server and InfoView. Familiarity with database environment and a web server software is beneficial.

Crystal Reports Server 2008 V1 guides

The following table provides a list of Crystal Reports Server 2008 V1 guides and a brief description of them:

Guide	Description
Crystal Reports Server 2008 V1 Installation Guide	This guide describes how to run the setup program and complete the installation of Crystal Reports Server 2008 V1. There are Linux and Windows versions of this guide available.
Crystal Reports Server 2008 V1 Upgrade Guide	This guide provides the upgrade scenarios for Crystal Reports Server 2008 V1 from the earlier versions.
Crystal Reports Server 2008 V1 Release Notes	This guide describes fixed and known problems in the Crystal Reports Server 2008 V1 release, and also describes what's new in Crystal Reports Server 2008 V1.
Crystal Reports Server 2008 V1 Getting Started Guide	This guide introduces Crystal Reports Server 2008 V1 components and describes how to work with them.
Crystal Reports Server 2008 V1 Quick Installation Guide	This guide describes how to run the quick install setup program and complete the installation of Crystal Reports Server 2008 V1. There are Linux and Windows versions of this guide available.
White Paper on WACS Administration and Deployment	This document elaborates the steps required to create a WACS instance, deploy different applications, and perform debugging.

For a complete list of all of our product documentation visit:
<http://help.sap.com/>

Common Features

The following table lists some of the common features in Crystal Reports Server 2008 V1:

Features	Description	Related documents
Publication	Data driven publishing is the process of making Crystal reports publicly available for mass consumption. The contents of these reports can be distributed automatically via email or FTP, saved to disk, or managed through the Crystal Reports Server platform for web viewing, archiving, and retrieval, and automated through the use of scheduling.	BusinessObjects Enterprise Administrator's Guide (Version: XI 3.1)
WACS support	The new Web Application Container Server (WACS) enables you to run the Central Management Console (CMC) on Windows systems without the need to install Java.	WACS White paper and BusinessObjects Enterprise Administrator's Guide (Version: XI 3.1)
.NET support	The deployment of ASP.NET web applications is now supported on Microsoft operating systems running the IIS web application server. The Crystal Reports Server 2008 V1 setup program can automatically deploy .NET support and .NET version of InfoView during installation.	BusinessObjects Enterprise Administrator's Guide (Version: XI 3.1)
IIS support	The use of the Microsoft Internet Information Services (IIS) web application server version 6 or 7 is now supported on Windows-based Crystal Reports Server 2008 V1 servers.	BusinessObjects Enterprise Administrator's Guide (Version: XI 3.1)

Features	Description	Related documents
Publishing reports using Publishing Wizard	Publishing refers to the process of adding objects to the Crystal Reports Server 2008 V1 environment, and making these objects available to authorized users. Once an object is published, it appears in the folder in InfoView (or your customized web portal), and in the Objects Management area of the Central Management Console (CMC).	BusinessObjects Enterprise Administrator's Guide (Version: XI 3.1)
Auditing	Auditing allows you to keep a record of significant events on Crystal Reports Server 2008 V1 servers.	BusinessObjects Enterprise 3.1 Administrator's Guide (Version: XI 3.1)
Discussions	The "Discussions" feature enables users to create notes for reports, hyperlinks, programs, and other objects in InfoView. Crystal Reports Server users who have the appropriate rights can view the notes or add their own comments to a discussion thread, which is a series of related notes in a hierarchical format. You can create a discussion thread or add notes to a discussion thread for any object to which you have access.	BusinessObjects Enterprise InfoView User's Guide (Version: XI 3.1)
My Infoview	My InfoView is a customized InfoView page layout that contains the objects (for example, reports, documents, and web sites) that you view on a regular basis. These objects are displayed according to settings that you define.	BusinessObjects Enterprise InfoView User's Guide (Version: XI 3.1)

Features	Description	Related documents
Dashboard Builder and Analytics	Dashboards can display objects such as Crystal reports, hyperlinks, or analytics in a single view so that you can analyze data.	Business Objects Dashboard Builder User Guide (Version: XI 3.1)
Encyclopedia	Encyclopedia provides business intelligence users with essential information about their reports.	BusinessObjects Enterprise InfoView User's Guide (Version: XI 3.1)
Importing documents using Import Wizard	Import Wizard enables administrators to import users, groups, folders, and reports from an existing BusinessObjects Enterprise, Crystal Enterprise to Crystal Reports Server 2008 V1.	BusinessObjects Enterprise Import Wizard Guide (Version: XI 3.1)
Migrating reports using Data Source Migration Wizard	The Data Source Migration Wizard enables users to migrate reports that are based on Crystal queries, dictionaries, and InfoViews to a Crystal Reports Server deployment.	Data Source Migration Wizard Administrator's Guide (Version: XI 3.1)



Working with Crystal Reports



chapter

Overview

This section describes features that are unique to Crystal Reports, such as viewing alerts, drilling and distributing reports. It also describes the Crystal Reports Offline Viewer.

When working with Crystal Reports, you can use all the InfoView features described in "Working with Objects", in *BusinessObjects Enterprise Infoview User's Guide*.


For more information on Infoview, see *BusinessObjects Enterprise Infoview User's Guide* available at <http://help.sap.com/>






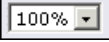
Viewing Crystal reports

When a report is displayed in a viewer, depending on the type of viewer that is deployed, and the functions that are enabled by the administrator, you can perform various activities. The following sections describe the options available on the Crystal Reports viewer toolbar, and describes how to use these options.

Crystal Reports viewer toolbar

The following table describes the options available in the Crystal Reports viewer toolbar:

Option	Description
	Refresh Page Obtains the most up-to-date data from the report's data source. Before you refresh the report you must have the necessary rights, and the report must contain the necessary data source information.

Option	Description
	<p>Export this report</p> <p>Exports the Crystal report to your local machine or to another machine on the network.</p>
	<p>Print this report</p> <p>Prints the report.</p>
	<p>Show/Hide Group Tree</p> <p>Shows or hides the group tree. When the group tree is displayed, you can use it to navigate the data in the report.</p>
	<p>Navigation</p> <p>Enables you to navigate the pages of a report. The following options are available:</p> <ul style="list-style-type: none"> • Go to Next Page • Go to Previous Page • Go to First Page • Go to Last Page
	<p>Search for text</p> <p>Enables you to search a specific instance of text.</p>
	<p>Zoom</p> <p>Enables you to zoom in or out on a report.</p>


Drilling Crystal reports

You can drill down on a report to view the data beneath the charts and summarized groups. Click the chart or summarized data to obtain a drilled down view.

To drill down on a Crystal reports, perform the following steps:

1. Open the report that you want to view.
2. In the Crystal Reports viewer, double-click the links in the report to drill down for more information.

Tip:

You can also use the group tree and/or report tabs available at the top of the viewing panel to drill down on report data. Click  on a report tab to close the drilled-down view of the data.

Viewing alerts in Crystal reports

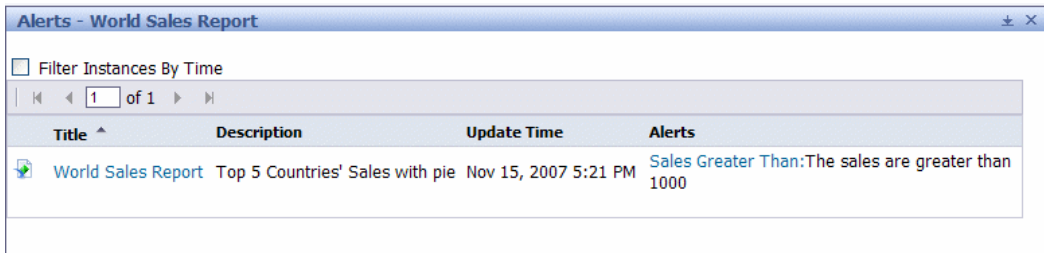
Crystal Reports Server 2008 V1 tracks report instances that trigger custom messages. These custom messages are called Alerts.

When you view a report, the alerts appear when certain conditions are met by report data. Alerts provide more information about the report data or prompt the user to perform an action.


To view alerts in Crystal Reports, perform the following steps:

1. In InfoView, go to the folder or category that contains the Crystal report you want to view.
2. Select the object, and select **Alerts** from the **Actions** menu in the InfoView Workspace toolbar.

The "Alerts" page appears.



The screenshot shows a window titled "Alerts - World Sales Report". At the top left, there is a checkbox labeled "Filter Instances By Time". Below it is a navigation bar showing "1 of 1" instances. The main content is a table with the following columns: "Title", "Description", "Update Time", and "Alerts".

Title ^	Description	Update Time	Alerts
 World Sales Report	Top 5 Countries' Sales with pie	Nov 15, 2007 5:21 PM	Sales Greater Than: The sales are greater than 1000

Note:

You can access Alerts only for the reports that contain Alerts. The Alerts page displays only the instances that triggered the alert.

3. Double-click the title to launch the report instance in the Crystal Report Viewer.

Parameters

Some Crystal reports have parameters, which prompts for input. You may be prompted for information when you refresh a report or view it on demand. You can also view and edit parameter values while you are viewing the report. Changing the parameter values enable you to perform analysis on the data. The report designer determines how the parameters affect the report. Some parameters may alter or modify the data you are viewing; some may format the data differently.

While viewing a report, you can also view and edit parameters in the Parameter Panel. Whether you can view or edit a parameter is determined by the report designer. Some parameters may require you to exit the report and view it again to edit their values. The Java and ActiveX viewers may prompt you to edit parameters when you view the report. You can edit these parameter values by refreshing the report.

Parameters may need new data from the database when edited. These are data parameters. Editing them causes increased load on your system's servers. Data parameters are indicated by an icon in the Parameter Panel. Non-data parameters do not require new data when edited, and do not have an icon in the Parameter Panel.

Crystal Reports supports optional parameters. If a report designer sets a specific parameter as optional, then you need not specify them to run the report. Instead, all possible data will be displayed. For example, a report may

contain an order date parameter. You enter a range of dates as the parameter value, and the report shows only the data about the orders available for the time range that you specified. If the report designer makes the order date parameter optional, you can enter a time range or leave the parameter blank to view all orders, regardless of their order date. Report designers indicate whether the parameter is optional in the prompt text.

When you schedule a report, each parameter's default value is used to determine how data is displayed in the resulting instance. Default values are also used to display reports if users are not prompted to enter a value for that parameter when refreshing the report. If the report is set to prompt users to change parameter values when the report loads, or if no default value exists, users are prompted for a parameter value.


Viewing and editing the parameters of Crystal reports in the Web Viewer

To view and edit the parameters of Crystal reports in the Web Viewer, perform the following steps:

1. Navigate to the folder or category that contains, Crystal report that you want to view, and double-click its title to open it.
2. If you are asked to enter the parameter values, the report has parameters that you must fill in before you can view it. Select the data you want to view, and click **OK**.

If you are not prompted to enter values for the parameters, the report does not have parameters that you must specify before you can view the report, and you are taken directly to the report.

The report appears.

3. Click **Parameters** in the Crystal Reports viewer toolbar to view the parameters that you can access from the report.
You can view the parameters in the Parameter Panel.
4. Click a parameter to select it.
5. Edit the parameter value in one of the following ways:
 - Edit the parameter directly in the Parameters Panel by typing in a new value.
 - Click **Edit**  to open an advanced editing dialog box, and enter the new values according to the instructions. Click **OK**.

6. Click **OK**.
7. Edit other parameters as per your needs. To view the report with new parameter values, click **Apply**.

Distributing Crystal reports

You can distribute Crystal reports in one of the following ways:

- Printing
- Exporting

Note:

- You can also send Crystal reports to email addresses, file locations, and Crystal Reports Server 2008 V1 inboxes. For more information, see the section "Sending objects or instances" in *BusinessObjects Enterprise InfoView User's Guide*.
- If you have the rights to schedule reports, you can also distribute reports by scheduling them directly to a disk location, an email, an FTP, or a printer. For more information, see the section "Destination locations" in *BusinessObjects Enterprise InfoView User's Guide*.

Printing Crystal reports


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

Note:

- The procedure for printing Crystal reports may vary depending on the Crystal Reports Viewer in use. However, the general principles for printing reports remain the same.
- If on-screen instructions are provided, follow those instructions instead of the steps described below.
- Page orientation is set by report designers when they create reports.

To print a Crystal report, perform the following steps:

1. Open the document that you want to view.

2. On the viewer toolbar, click **Print Report** .
The "Print" screen appears.
3. In the Print range area, select all pages or type a specific range of pages.
4. In the Copies area, select the number of copies that you want to print.

Tip:

If you select the Collate option, the pages are printed in order. (For example, if you are printing two copies of a report that has four pages, 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. Click **OK**.

Exporting Crystal reports

You can export instances of reports, as well as the reports that you view on demand, into several formats to facilitate the distribution of information. For example, you can export data that predicts sales trends to an Excel spreadsheet, and then email it to the sales team.

Tip:

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

Format types

Crystal Reports Server 2008 V1 supports the following export format types:

- Crystal Reports (RPT)
- PDF
- Microsoft Excel (97-2003)
- Microsoft Excel (97-2003) Data-only
- Microsoft Word (97-2003)
- Microsoft Word (97-2003) - Editable

- Rich Text Format
- Comma Separated Values (CSV)
- XML


Note:

- When you export a report to a file format other than Crystal Reports format (.rpt), you may lose some or all the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.
- The difference between Excel and Excel (Data only) is that Excel attempts to preserve the look and feel of your original report.
- The Microsoft Word (97-2003) format maintains as much formatting as possible, including graphics. Each object appears in an individual text field. Microsoft Word (97-2003) — Editable format does not preserve as much formatting. Text is displayed in lines and the images are placed in line with the text. Rich Text Format is similar to Microsoft Word (97-2003).
- Comma Separated Values (CSV) format is available only from the Web viewer.
- You cannot export to Crystal Reports (RPT) format from a drilled-down view.

For more information on the options you must set to schedule Crystal Reports to a specific format, see *Crystal Reports User's Guide*.

Exporting reports

To export reports, perform the following steps:

1. Open the document that you want to view.
2. On the viewer toolbar, click **Export Report** 
The "Export" screen appears.
3. In the **Page Range** area, select all pages or type a specific range of pages.
4. Click **Export**.

Interactive Sorting

Interactive sorting is a Crystal Reports feature that when enabled by the report designer enables you to sort data in a report while you view it. You can use interactive sorting even if you do not have access to the database on which the report is built because interactive sorting does not require any new data from the database.



You can find out whether interactive sorting is enabled for a report from the interactive sorting controls for the fields.



You can sort data alphabetically (if the data is in the form of a text string, such as the name of a country) or numerically, and in either ascending or descending order.

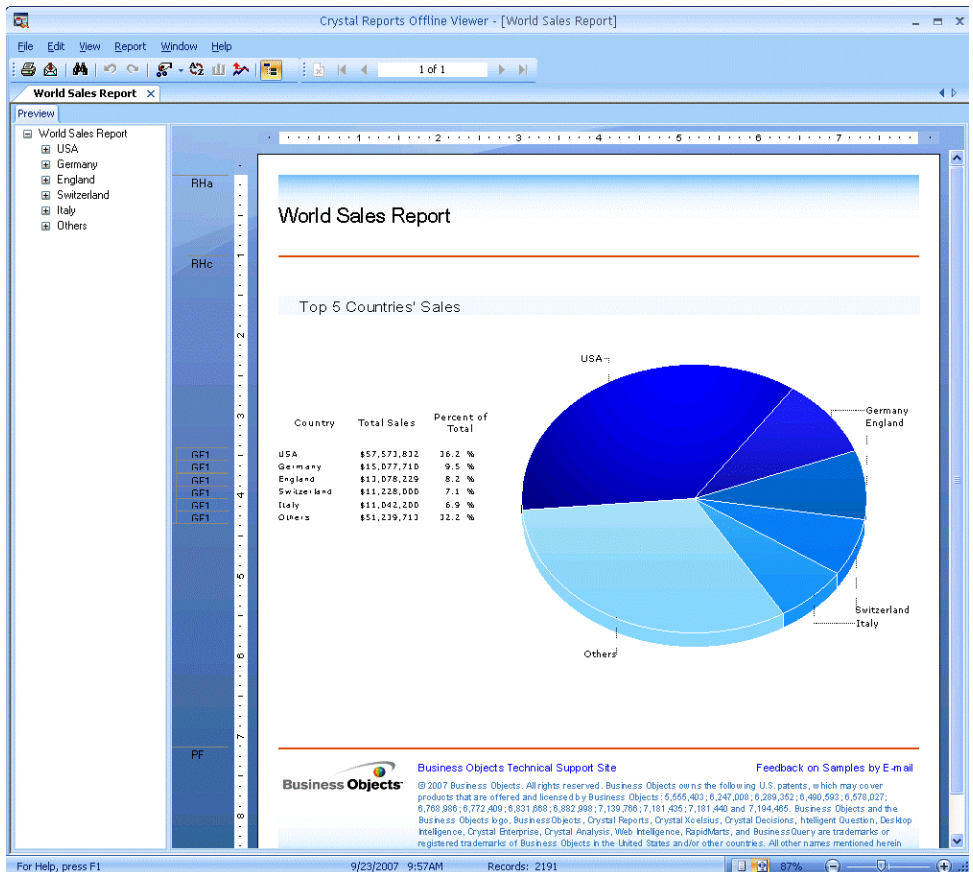
Sorting data interactively

To sort the data interactively, perform the following steps:

1. Open a Crystal report for which interactive sorting is enabled.
2. Choose a value to sort by.
3. Click the appropriate arrow to sort the data in the report by your preference value:
 - To view reports in the ascending order, click 
 - To view reports in the descending order, click 

Crystal Reports Viewer

The Crystal Reports Viewer is a report viewer that is installed locally on the computer. You can use this viewer to view the Crystal reports downloaded without connecting to Crystal Reports Server 2008 V1.



The Crystal Reports Viewer enables you to perform the following tasks:

- Print or export reports
- Save the reports
- Select data to view
- Drill down on a report, for more details
- View multiple reports

The Crystal Reports Viewer functions similarly to Crystal Reports. For more information about the tasks that you can perform with the Crystal Reports Viewer, see the online help from the Crystal Reports Viewer Help menu.

Installing the Crystal Reports Viewer

You can download the Crystal Reports Viewer from the SAP BusinessObjects website: <http://www.sap.com/solutions/sapbusinessobjects/sme/reporting/viewer/featuresfunctions/index.epx>. You can find the viewer in the Crystal Reports section of the website. Once the viewer is installed, it resides locally as a client-side viewer.

To install the Crystal Reports Viewer, perform the following steps:

1. Download the Crystal Reports Viewer installation program from the Crystal Reports section of the SAP BusinessObjects website: <http://www.sap.com/solutions/sapbusinessobjects/sme/reporting/viewer/featuresfunctions/index.epx>
2. Run the installation program.
3. Follow the on-screen instructions, and accept the default values if you do not want to modify it.
4. Click **Finish**, when the installation is done.

Launching the Crystal Reports Viewer

To launch Crystal Reports Viewer, select a Crystal report (.rpt) file from your machine and double-click it.

Note:

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



Publishing reports to Crystal
Reports Server 2008 V1

3

chapter



What is publishing?

Publishing refers to the process of adding objects to the Crystal Reports Server 2008 V1 environment, and making these objects available to authorized users. Once an object is published, it appears in the folder in InfoView (or your customized web portal), and in the Objects Management area of the Central Management Console (CMC).

The following object types can be published and viewed in Crystal Reports Server 2008 V1:

- reports (from Crystal Reports)
- programs
- Microsoft Excel/Word/PowerPoint files
- Adobe Acrobat PDFs
- text files
- rich text format files
- hyperlinks
- object packages (which consist of report objects, program objects, or both)

Note:

Crystal Reports Server 2008 V1 supports reports that are created in versions 6 through XI, XI Release 2, and Crystal Reports 2008 V0 of Crystal Reports. However, once a report is published to Crystal Reports Server 2008 V1, it is saved, processed, and displayed in the current version format.

Publishing reports using the Publishing Wizard

The Publishing Wizard consists of a set of dialog boxes. However, only the dialog boxes that are applicable to the reports and folders that are published appear. To use the wizard, you first connect to Crystal Reports Server 2008 V1, and then select the reports and folders you want to publish, the publishing location, and the schedule.

You can use the Publishing Wizard to publish one or more reports, or an entire directory of reports, to Crystal Reports Server 2008 V1.

Note:

You need specific permissions to publish reports by using the Publishing Wizard. For more information, contact the Crystal Reports Server 2008 V1 administrator.

Connecting to Crystal Reports Server 2008 V1

When you use the Publishing Wizard, you are prompted to log into the Crystal Reports Server 2008 V1 system to which you want to publish reports.

To connect to Crystal Reports Server 2008 V1, perform the following steps:

1. Select **Start > Programs > Crystal Reports Server 2008 > Crystal Reports Server 2008 > Publishing Wizard**.

The "Welcome to the Publishing Wizard" screen appears.

2. Click **Next**.

The "Please Log On" screen appears:

Publishing Wizard

Please Log On

Before users can access your file through the Business Objects Business Intelligence Platform, the file must be published.

Enter the system name. You also need to specify your user name and password.

System:

User Name:

Password:

Authentication:

< Back Next > Cancel Help

3. Enter the following information:

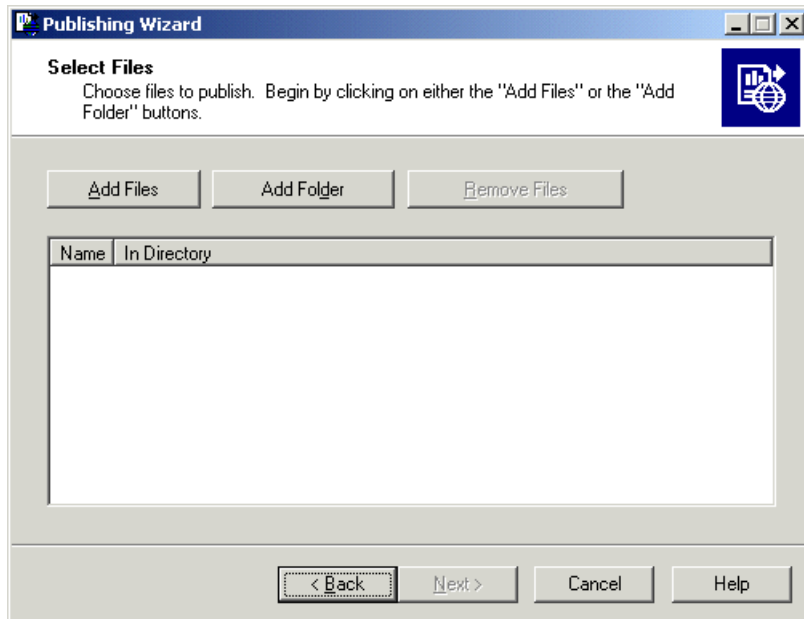
- a. In the **System** field, type the name of the CMS where you want to publish objects.
 - b. In the **User Name** and **Password** fields, type your Crystal Reports Server 2008 V1 login credentials.
 - c. From the **Authentication** list, select the appropriate authentication type.
4. Click **Next**.
The "Select Files" screen appears.

Selecting reports to publish

To publish the reports, you must select the files.

To select the files to publish, perform the following steps:

1. In the "Select Files" screen, click **Add Files** or **Add Folders**.



2. Select the file or folder that you want to publish.
Repeat step 1 and 2 for each of the files or folders that you want to publish.

Tip:

- Ensure that the file type is .rpt.
- If you are publishing a folder, you can also publish its subfolders by selecting the **Include Subfolders** option.

3. Click Next.

The "Specify Location" screen appears.

Note:

If the "Specify Object Type" screen appears, this implies that the Publishing Wizard did not recognize the file type. Select an appropriate file type for each unrecognized object, and then click **Next**.

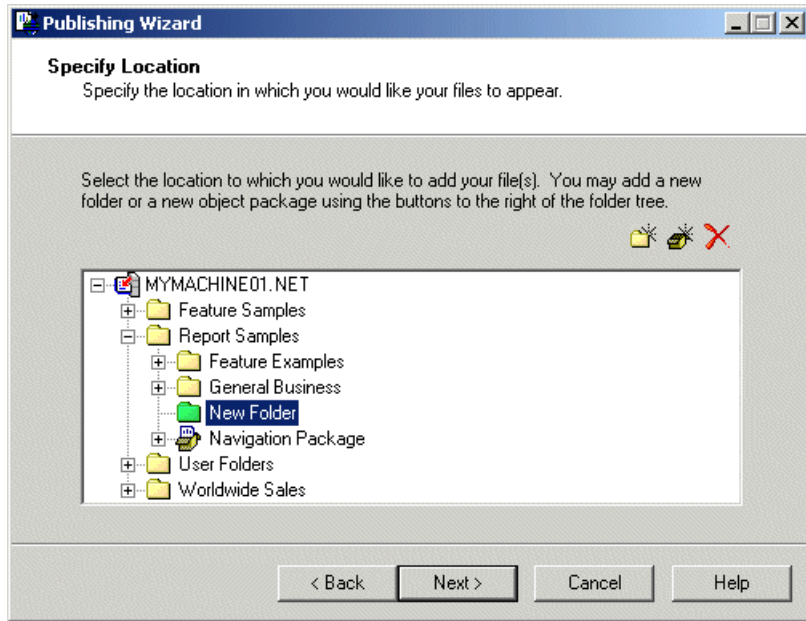
Specifying a publishing location

To publish the selected reports, you must create or select a folder on the host CMS. Only the folders to which you have access appear in the "Specify Location" screen.

To specify the publishing location for the report objects, perform the following steps:

- 1.** In the "Specify Location" screen, select the folder where you want to publish the reports, as shown in the following figure:

3 Publishing reports to Crystal Reports Server 2008 V1 Publishing reports using the Publishing Wizard



Tip:

To add a new folder to the CMS, select a folder and then click **New**

Folder  .

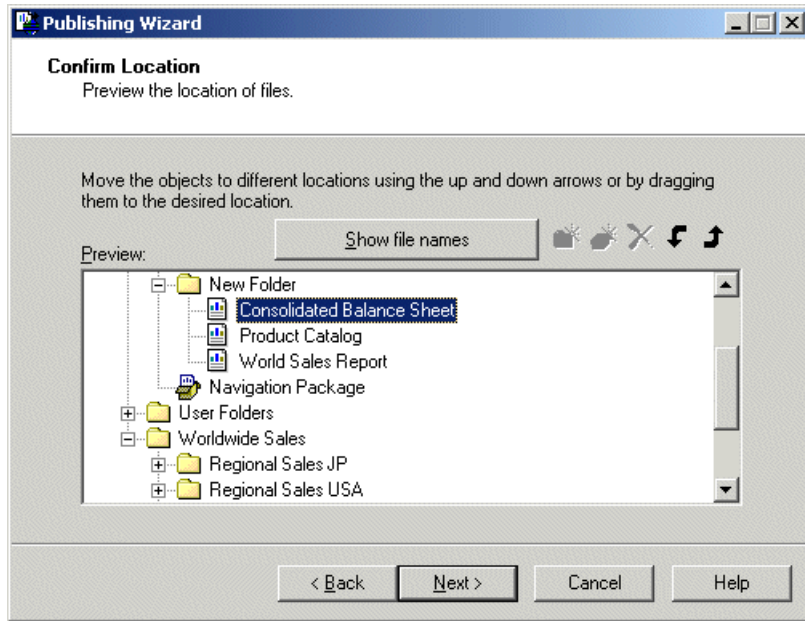
Note:



From the wizard, you can delete only new folders. Green indicates that a folder is newly created and yellow indicates that the folder is an existing folder.

For information on how to publish multiple reports and place them in a separate directory, see [Specifying or duplicating a folder hierarchy](#).

2. Click **Next**.

The "Confirm Location" screen appears, as shown in the following figure:



You can move reports to folders by selecting each object, and then clicking **Move Up**  or **Move Down** .

You can also drag reports to place them where you want, and you can right-click objects to rename them.

Tip:

By default, the titles of the reports are displayed. You can display the local file names of the reports by clicking the **Show file names** button.

3. Click Next.

- When publishing a single report or multiple reports from the same location, the Publishing Wizard proceeds directly to the "Specify Categories" screen.
- When publishing multiple reports from different directories and subdirectories, the "Specify Folder Hierarchy" screen appears.

Specifying or duplicating a folder hierarchy

The "Specify Folder Hierarchy" screen enables you to specify or duplicate the folder hierarchy of the selected reports on the CMS, as it appears on the hard drive.

To specify or duplicate the folder hierarchy, perform the following steps:

1. In the "Specify Folder Hierarchy" screen, select one of the following folder hierarchy options:
 - To place all reports in a single folder, select **Put the files in the same location**.
 - To recreate all the folders and subfolders on the CMS as they appear on the hard drive, select **Duplicate the folder hierarchy**. Select the topmost folder from the drop-down list.
2. Click **Next**.

The "Specify Categories" screen appears.

If you want to add the selected reports to a category, you can select an existing category or create a new category on the host CMS. The reports can be added to more than one category.

For more information about categories, see *BusinessObjects Enterprise Administrator's Guide*.

3. Click **Next**.
The "Specify Schedule" screen appears.

Selecting a scheduling option

The "Specify Schedule" screen enables you to schedule reports, to run at specific intervals.

To specify the scheduling option for reports, perform the following steps:

1. In the "Specify Schedule" screen, select the report that you want to schedule.
2. Select one of the following intervals:
 - **Run once only**

The **Run once only** option supports the following sub-options:

- **when finished this wizard**

If you select this option, the report is run only once after you publish it. The report will not run until you reschedule it.

- **at the specified date and time**

If you select this option, the report is run once on the specified date and time. The report will not run until you reschedule it.

- **Let users update the object**

If you select this option, the report is not rescheduled. Instead, it leaves the task of scheduling to the user.

- **Run on a recurring schedule**

Once you select this option, you must click **Set Recurrence** to set the scheduling options.

The "Pick a recurrence schedule" screen appears.

This option enables you to select when and how often the report must run. Select the appropriate options, and click **OK**.

3. Click **Next** after you have set the schedule for each report you want to publish.

The "Specify Repository Refresh" screen appears.

Refreshing repository fields

The Crystal Reports Server 2008 V1 repository is a central location in which shared elements, such as text objects, bitmaps, custom functions, universes, and custom SQL commands, are stored.

If the report references the repository, you can refresh the repository fields of the report. To refresh repository fields, connect the Publishing Wizard to the Crystal Reports Server 2008 V1 Repository database from the local machine.

To refresh the repository fields of the report object, perform the following steps:

1. In the "Specify Repository Refresh" screen, select a report, and then select the **Use Object Repository when refreshing report** checkbox.

Tip:

Click the **Enable All** button if you want to refresh all the reports that reference the repository. Click the **Disable All** button if you want to refresh none of the reports.

2. Click **Next**.

For more information on refreshing the repository fields, see *BusinessObjects Enterprise Administrator's Guide*.

Publishing with saved data

If you publish a report that includes saved data, you are prompted by the "Specify Keep Saved Data" screen.

Note:

If you choose not to keep saved data, ensure that your ODBC logon credentials are correct. Otherwise, when you try to view or refresh the report, the following error message is displayed: "Failed to open the connection". Consult your database administrator if this happens.

To publish a report with saved data, perform the following steps:

1. In the "Specify Keep Saved Data" screen, select a report, and then select the **Keep saved data when publishing report** checkbox if you want to keep the report's saved data.

Tip:

Click the **Enable All** button if you want to keep the saved data for all of the reports; click the **Disable All** button if you do not want to keep saved data for any of the reports.

2. Click **Next**.

The "Change Default Values" screen appears.

You can publish reports without changing any of the default properties, which is what you do for the purposes of this tutorial. For more information, see *BusinessObjects Enterprise Administrator's Guide*.

3. In the "Change Default Values" screen, click **Publish without modifying properties**, and then click **Next**.

Finalizing the reports to be published

After you provide the required information for the reports, the Publishing Wizard displays a list of all the reports that you chose to publish.

To finalize the reports to be published, perform the following steps:

1. Ensure that all reports that you want to publish are included in the list, and click **Next**.

The reports are published to the CMS, scheduled, and/or run as specified. After this, you will return to the final screen of the Publishing Wizard.

2. To view the details of a report, select the report from the list.
3. Click **Finish** to close the wizard.

Publishing reports by using the Central Management Console

If you have administrative rights to Crystal Reports Server 2008 V1, you can publish reports over the web from the Central Management Console (CMC). You can use CMC to publish single reports or perform administrative tasks remotely.

To publish the reports using CMC, perform the following steps:

1. Select **Start > Programs > Crystal Reports Server 2008 > Crystal Reports Server 2008 > Central Management Console**.
2. On the CMC Log On page, enter the following information.
 - a. In the **System** field, type the name of the CMS where you want to publish reports.
 - b. In the **User Name** and **Password** fields, type your Crystal Reports Server 2008 V1 login credentials.
 - c. From the **Authentication Type** list, select the appropriate authentication type.
3. Click **Log On**.
4. On the CMC home page, click **Folders** and select the folder to which you have access.
5. Select **Manage > Add**, and click one of the following:

- **Crystal Reports:** To publish a Crystal Report, perform the following steps in the "Crystal Reports" screen.
 - a. Type the full path to the report, or click **Browse** to search a file.
 - b. Select the **Use description from report** and **Keep saved data** options if required.
 - c. You can use the "General properties" to edit the properties of the file.
 - d. To categorize the file you can use the "Categories" option, and select the category from the list.
 - e. Click **OK**.
- **Program File:** To publish a Program File, perform the following steps in the "Program File" screen.
 - a. Type the full path to the report, or click **Browse** to search a file.
 - b. Select the **Executable**, **Java** or **Script** options based on the file type.
 - c. To categorize the file you can use the "Categories" option, and select the category from the list.
 - d. Click **OK**.
- **Local Document...:** To publish a Local Document, perform the following steps in the "Local Document" screen.
 - a. Type the full path to the report, or click **Browse** to search a file.
 - b. Select the type of the file from **File Type** drop-down list and enter the **MIME** information.
 - c. You can use the "General properties" to edit the properties of the file.
 - d. To categorize the file you can use the "Categories" option, and select the category from the list.
 - e. Click **OK**.

When the report is published to Crystal Reports Server 2008 V1, the CMC displays the Properties screen. If necessary, you can modify properties such as title, description, database logon information, scheduling information, user rights, and so on.

Saving reports directly to the CMS

In Crystal Reports, you can use the **Save As** option to publish reports directly to Crystal Reports Server 2008 V1 from the designer.

To save the reports directly to the CMS, perform the following steps:

1. After you design a report in Crystal Reports, click **Save As** on the **File** menu.

The "Save As" screen appears.

2. Click the **Enterprise** icon on the left of the " Save As" screen.

The " Log on to BusinessObjects Enterprise" screen appears.

3. Enter the following information.

- a. In the **System** field, type the name of the CMS where you want to publish the report.
- b. In the **User Name** and **Password** fields, type your Crystal Reports Server 2008 V1 login credentials.
- c. From the **Authentication** list, select the appropriate authentication type.

4. Click **OK**.

5. Specify the folder where you want to save the report, and click **Save**.

3 | Publishing reports to Crystal Reports Server 2008 V1

Saving reports directly to the CMS



Crystal Reports Server 2008
V1 Product Information

4

chapter



Crystal Reports Server 2008 V1 components

This section provides an overview of the Crystal Reports Server 2008 V1 components with details like where to find information about them. Crystal Reports Server 2008 V1 includes the following components:

- Business View Manager

Enables you to design relational views of information that provides a wide range of capabilities, for creating and modifying Data Connections, Dynamic Data Connections, Data Foundations, Business Elements, and Business Views.

For more information on Business View Manager, see *Business Views Administrator's Guide*.

- InfoView

InfoView is a web application that provides a window for Crystal reports that are published to Crystal Reports Server 2008 V1. InfoView enables you to view, schedule, export, and save Crystal reports.

For more information on InfoView, see *BusinessObjects Enterprise InfoView User's Guide*.

- Central Configuration Manager

The Central Configuration Manager (CCM) is a server-management tool that enables you to configure each of the Crystal Reports Server 2008 V1 components. This tool enables you to start, stop, enable, and disable servers, and it enables you to view and configure advanced server settings.

For more information on Central Configuration Manager, see the "Administering BusinessObjects Enterprise" section in *BusinessObjects Enterprise Administrator's Guide*.

- Central Management Console

The Central Management Console (CMC) is a web application that provides a way to manage the Crystal Reports Server 2008 V1 environment. It can be used to manage users, content, and servers. You can also use the CMC to stop, enable, and configure servers.

For more information on Central Management Console, see the "Administering BusinessObjects Enterprise" section in *BusinessObjects Enterprise Administrator's Guide*.

- Import Wizard

The Import Wizard is a locally installed tool that enables administrators to import users, groups, folders, and reports from an existing SAP BusinessObjects Enterprise, Crystal Enterprise, or Crystal Info implementation to Crystal Reports Server 2008 V1.

For more information on Import Wizard, see *BusinessObjects Enterprise Import Wizard Guide*.

- Publishing Wizard

The Publishing Wizard is a locally installed tool that enables administrators and users to add Crystal reports to Crystal Reports Server 2008 V1.

For more information on Publishing Wizard, see the "Publishing Wizard procedures" section in *BusinessObjects Enterprise Administrator's Guide*.

- Data Source Migration Wizard

The Data Source Migration Wizard is a tool that enables you to migrate Crystal reports that are based on Crystal queries, dictionaries, and Business Views to Crystal Reports Server 2008 V1.

For more information on Data Source Migration Wizard, see *Data Source Migration Wizard Help*.

- Deployment Diagnostic Tool

The Deployment Diagnostic Tool is a Java-based application designed to verify basic operating functionality of a Crystal Reports Server 2008 V1 installation. It is an open-framework utility that allows for the development of additional test drivers through the use of various SDKs provided by SAP BusinessObjects.

For more information on Deployment Diagnostic Tool, see *BusinessObjects Enterprise Deployment Diagnostic Tool User's Guide*.

- Dashboard Builder

Dashboard Builder is an SAP BusinessObjects Dashboard and Analytics application that helps you manage and track your company's performance

using analytics and dashboards, as well as schedule the refresh of metrics, sets, control charts, predictive models, and analytics.

For more information about Dashboard Builder, see *BusinessObjects Dashboard Builder User Guide*.

- Software Inventory Tool

The Crystal Reports Server Software Inventory Tool is a Java-based maintenance tool available to administrators. It creates and maintains an inventory of all changes made to Crystal Reports Server 2008 V1 via the installers and allows users to view these changes.

For more information about Software Inventory Tool, see *BusinessObjects Enterprise Software Inventory Tool User's Guide*.

For more information on using Crystal Reports Server 2008 V1, see *BusinessObjects Enterprise Administrator's Guide*.

BusinessObjects XI .Net Providers

BusinessObjects XI .NET Providers enables you to build a Crystal Reports Server 2008 V1 web application with minimal coding. The web application enables you to log into an SAP BusinessObjects system, browse folders, and view reports and other documents.

BusinessObjects XI .NET Providers is an enhancement to the BusinessObjects Enterprise XI Release 2 SDK.

BusinessObjects XI .NET Providers support the following features:

- The design-time feature enables you to build web applications that use BusinessObjects XI .NET Providers.
- The runtime feature enables you to run web applications that use BusinessObjects XI .NET Providers.

The following table summarizes the BusinessObjects XI .NET Providers features included in the Crystal Reports Server 2008 V1 installation:

Is Visual Studio 2005 installed on your computer?	Is .NET Framework 2.0 installed on your computer?	BusinessObjects XI .NET Providers features installed
Yes	Yes (.NET Framework 2.0 is installed with Visual Studio 2005)	Runtime and design-time.
No	Yes	Runtime only. To install the design-time features, install Visual Studio 2005. Then, run the BusinessObjects XI .NET Providers Standalone Install or Crystal Reports Server 2008 V1 Install.
No	No	No component is installed. To install only the runtime feature, install .NET Framework 2.0. To install both runtime and design-time features, install Visual Studio 2005. Then, run the BusinessObjects XI .NET Providers Standalone Install or Crystal Reports Server 2008 V1 Install.

Note:

To install BusinessObjects XI .NET Providers, the .NET Framework 2.0 or Visual Studio 2005 must be installed before Crystal Reports Server 2008 V1.



Crystal Reports Server 2008
V1 Add-ons

5

chapter



Live Office

Live Office provides access to up-to-date information used everyday to do your job, and make important business decisions. It gives you real-time data that is verifiable and easily refreshed. Live Office is built into Microsoft Office applications that you already use. The information you need is available in a familiar, easy to use format. Live Office empowers business workers to easily access corporate data from within Microsoft Office Excel, Word, Outlook, and PowerPoint without depending on IT expertise to use complex business intelligence tools.

For more information on Live Office, see *BusinessObjects Live Office Installation Guide* and *BusinessObjects Live Office User's Guide*.

SharePoint Portal Integration Kit

SharePoint Portal Integration Kit is a powerful solution for Microsoft Windows SharePoint Portal Services or Microsoft Office SharePoint Portal Server and Crystal Reports Server.

It enables you to access all business intelligence resources such as Crystal Reports, OLAP Intelligence, and any Microsoft Office documents that are stored in the Central Management Server (CMS). In addition, users can navigate to personal/favorites folder, public folders, SAP BusinessObjects inbox, personal categories and corporate categories.

Note:

Crystal Reports Server 2008 V1 supports SharePoint 2003 and SharePoint 2007 Portal Integration Kit.

For more information about BusinessObjects XI SharePoint Portal Integration Kit, see *Portal Integration Kit Administrator's Guide for Microsoft SharePoint* and *Portal Integration Kit User's Guide for Microsoft SharePoint*.

Java Portal Integration Kit

Java Portal Integration Kit integrates the content directly with Java-based portals, and provides the user with a personalized, single, secure view of corporate information.

For information about Java Portal Integration Kit, see *Portal Integration Kit Administrator's Guide for Portlets*.

Xcelsius

Xcelsius provides consolidated views of the key metrics, which helps you to answer your business questions at a glance. It also interacts with the data with what-if scenarios and other visual components, and uses the data to make informed decisions.

Xcelsius is a Microsoft Windows application that bridges the gap between data analysis and visual presentation, empowering users of all proficiencies to create visually stunning interactive reports and applications.

With Xcelsius, users can communicate data in a clear and powerful style that is appealing.

For more information about Xcelsius, see the *Xcelsius 2008 User Guide*.

Integration Option for Microsoft Sharepoint Software

The Integration option for Microsoft SharePoint software runs in your web browser and is your main interface for working with objects in Crystal Reports Server 2008 V1. The different types of objects include Crystal reports, Voyager workspaces, and other objects that are created by using the Crystal Reports Server 2008 V1 plug-in components. The web parts in the Integration option for Microsoft SharePoint software enable you to access, view, organize, and work with objects from within the SharePoint system.

Note:

You can customize the appearance and functionality of the Integration option for Microsoft SharePoint software.

For more information on Integration option for Microsoft SharePoint, see *Integration Option for Microsoft SharePoint software Getting Started Guide*.



More Information



appendix

Information Resource	Location
SAP BusinessObjects product information	http://www.sap.com
SAP Help Portal	<p>Select http://help.sap.com > SAP BusinessObjects.</p> <p>You can access the most up-to-date documentation covering all SAP BusinessObjects products and their deployment at the SAP Help Portal. You can download PDF versions or installable HTML libraries.</p> <p>Certain guides are stored on the SAP Service Marketplace and are not available from the SAP Help Portal. These guides are listed on the Help Portal accompanied by a link to 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.</p>
SAP Service Marketplace	<p>http://service.sap.com/bosap-support > Documentation</p> <ul style="list-style-type: none"> • Installation guides: https://service.sap.com/bosap-inst-guides • Release notes: http://service.sap.com/releasenotes <p>The SAP Service Marketplace stores certain installation guides, upgrade and migration guides, deployment guides, release notes and Supported Platforms documents. Customers with a maintenance agreement have an authorized user ID to access this site. Contact your customer support representative to obtain an ID. If you are redirected to the SAP Service Marketplace from the SAP Help Portal, use the menu in the navigation pane on the left to locate the category containing the documentation you want to access.</p>
Developer resources	<p>https://boc.sdn.sap.com/</p> <p>https://www.sdn.sap.com/irj/sdn/businessobjects-sdklibrary</p>

Information Resource	Location
SAP BusinessObjects articles on the SAP Community Network	<p>https://www.sdn.sap.com/irj/boc/businessobjects-articles</p> <p>These articles were formerly known as technical papers.</p>
Notes	<p>https://service.sap.com/notes</p> <p>These notes were formerly known as Knowledge Base articles.</p>
Forums on the SAP Community Network	<p>https://www.sdn.sap.com/irj/scn/forums</p>
Training	<p>http://www.sap.com/services/education</p> <p>From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style.</p>
Online customer support	<p>http://service.sap.com/bosap-support</p> <p>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.</p>
Consulting	<p>http://www.sap.com/services/bysubject/businessobjectscounseling</p> <p>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.</p>



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