Scheduling and Publishing Documents in Web Intelligence
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1 Scheduling and publishing documents

1.1 Introduction to scheduling and publishing

The following sections introduce you to the basic concepts and main functionalities of the scheduling and publishing services offered by the Business Intelligence Platform.

With scheduling and publishing operations, you can send documents with the latest information and data. Both services are about managing assets of your Central Management Server (CMS) such as Web Intelligence documents. At the end of this section, you will be able to schedule documents, publish them, and fine-tune both processes along the way.

This section focuses mainly on the scheduling and publishing possibilities offered by the Business Intelligence Launch Pad. However, the Central Management Console (CMC) lets you schedule and publish documents as well.

1.2 Concepts

Multiple elements and parameters can help you schedule the content objects.

The following sections provide you with details about concepts related to scheduling the reports.

<table>
<thead>
<tr>
<th>For more information about</th>
<th>Read</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instances</td>
<td>Instances [page 5]</td>
</tr>
<tr>
<td>Prompts</td>
<td>Prompts [page 6]</td>
</tr>
<tr>
<td>Formats</td>
<td>Formats [page 7]</td>
</tr>
<tr>
<td>Destinations</td>
<td>Destinations [page 10]</td>
</tr>
<tr>
<td>Delivery rules for scheduled documents</td>
<td>Delivery rules for scheduling [page 18]</td>
</tr>
</tbody>
</table>
1.2.1 Instances

An instance is a single version of a document or publication. For each scheduled document that runs, the BI Platform saves a history of instances to the default Enterprise server.

For each document or publication, the list of instances is available in the History dialog. You can also access the list on instances by clicking the Instances tile on the home page. In the BI Launch Pad, click and select History in the contextual menu. The history displays information such as:

- Instance time
- Title
- Status
- Created by
- Type
- Parameters

You can view discussions for an instance in the History dialog or in the Collaboration drawer of the feed panel, if the BI Launch Pad is integrated with SAP Jam.

1.2.2 Recurrence

The recurrence pattern defines how often you want the BI Platform to run a document.

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Now</td>
<td>Immediately runs the document once.</td>
</tr>
<tr>
<td>Once</td>
<td>Runs the document once at a specified time. If you schedule a document with events, it will run once if the event is trig-gered between the start and end times.</td>
</tr>
<tr>
<td>Hourly</td>
<td>Creates an instance every N hours and X minutes between the interval of dates you specify.</td>
</tr>
<tr>
<td>Daily</td>
<td>Runs the document once every N days between the interval of dates you specify. The first instance will be created at the specified start time, and instances will be created every N days at that time until the document stops running at the specified end time.</td>
</tr>
<tr>
<td>Weekly</td>
<td>Runs the document each week on selected days between the interval of dates you specify. The first instance will be created at the specified start time, and instances will be created each week on those days at that time until the document stops running at the specified end time.</td>
</tr>
<tr>
<td>Option</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Business Hours</td>
<td>Runs the document at a specific interval, every N hours, between a start and end time. You can also specify whether you want the document to run every day of the week, or on specific days, and set dates between which the document you run regularly (between February 13th 2020 and June 12th 2020 for instance).</td>
</tr>
<tr>
<td>Monthly</td>
<td>Runs the document once every N months between the interval of dates you specify. The first instance will be created at the specified start time, and instances will be created every N months at that time until the document stops running at the specified end time.</td>
</tr>
<tr>
<td>Specific Day of a Month</td>
<td>If set to Day of the month, creates an instance each month on the specified day, at the specified start time. The first instance will be created at the specified start time, and instances will be created on the specified day of each month at that time until the document stops running at the specified end time. If set to Week-day of the month, you can select a specific day of the week in the month (for example, the first tuesday of the month, the third monday of the month and so on).</td>
</tr>
<tr>
<td>Calendar</td>
<td>Creates an instance on each calendar date you specify at a specified start time.</td>
</tr>
</tbody>
</table>

**i Note**

Calendars can’t be created in the BI Launch Pad. They must be created in the Central Management Console first before you can see them in the BI Launch Pad. See Creating a calendar for more information.

### 1.2.3 Prompts

A prompt is a filter in the form of a question displayed by Web Intelligence that you answer by selecting specific values.

When you answer a prompt, it determines the data displayed in a report. If you are working in sales for example, and a prompt asks you to select a region, the document will only display data related to the region you selected.

When a document is scheduled, prompts can have static values and are specified when creating the scheduling job. For SAP Business Explorer (SAP BEx) queries, you can fill prompts dynamically using BW variables default values. This mechanism supports any type of SAP Business Warehouse (SAP BW) default values including SAP exit variables.
The support of dynamic prompt values is also available for SAP HANA variables and universe prompts parameters that contain dynamic expressions in their default values.

**Note**

To have dynamic prompt values in a scheduled document on BEx, make sure that:
- You select the *Use BEx query defined default values at runtime* option in the Variable Manager wizard.
- You purge document data using the *Purge Last Selected Prompt Values* option.
- You purge the prompt(s) value(s) when creating the scheduling job.

The way that options appear in the tab might differ from a document to another, depending on how the system administrator has configured the prompts.

**Note**

If you cannot see the *Prompts* tab, that is because the document you are scheduling doesn’t contain prompts.

### Constant and dynamic values processing

You can modify a prompt’s value by clicking either *Modify* to edit a value, *Constant Value* or *Dynamic Value* to set it to dynamic or constant.

Constant values are fixed values that don’t require calculations. Web Intelligence can schedule documents with constant values immediately.

Dynamics values are processed based on other documents to filter and compute the values.

SAP BEx variables, SAP HANA variables and Universe variables can support dynamic values. Dynamic values contain expressions and require calculations at runtime. Web Intelligence delegates the calculations to the backend (either the Universe Information Engine, SAP BEx or SAP HANA), and schedules the document after the values are computed. SAP BW exit or customer exit variables for example are often used as dynamic variables in prompts.

### 1.2.4 Formats

You can save an instance in different formats after the BI Platform generates it.

When you schedule a document you can save an instance in the following formats:

- Web Intelligence: .WID
- Microsoft Excel - Data: .XLSX
- Microsoft Excel - Reports: .XLSX
- Adobe Acrobat: .PDF
- Comma Separated Values (CSV) - Data: .CSV
- Comma Separated Values (CSV) Archive - Reports: .ZIP
- Plain text: .TXT
When you publish a document you can save an instance in the following formats:

- Web Intelligence: .WID
- Microsoft Excel: .XLSX
- Adobe Acrobat: .PDF
- MIME HTML: .MHTML

**Excel Formats**

You can choose whether you want to schedule the whole reports or only the data providers. Select *Microsoft Excel - Data* to export the queries’ data providers. When exporting, a sheet in the Excel file is created per selected data provider. The name of the sheet is the name of the data provider.

**Note**

This option is only available if the *Export the cube’s data* security right is granted.

If you want to export individual reports, select *Microsoft Excel - Reports*.

**CSV formats**

You can choose to save the following CSV options:

- CSV - Data: Generates a CSV file with the contents of the data provider.
- CSV Archive - Reports: Generates a ZIP file of CSV files. Each CSV corresponds to one report and contains the report data.

Regardless of the format you select, you can edit the CSV options by setting the *Default options* toggle to off, and specify a text qualifier, a column delimiter and the charset. In the column delimiter drop down, you can also directly type in a custom character you want to use, such as the pipe (|) for instance. If needed, you can generate one CSV file per data provider by checking the dedicated option.

**Chart resolution configuration**

When you schedule a document to save an HTML archive, you select the reports to include in the archive and make sure that each report has a unique name.

The HTML archive contains the following files and folders in a single ZIP file that you can download:

- A default *index.html* file that contains links to the reports in the archive. To see a report, you click the link with the report name. You can replace the default *index.html* file with one you create to suit your business needs.
- A JavaScript file, *report.js* returns the report names from the document included in the archive. This script is used to generate the links in the *index.html* file.
A sub-folder for each report in the archive. The sub-folder contains additional content for the report. Note that your administrator manages the resolution (DPI) for charts rendered as pictures through scheduling in the C:\Program Files (x86)\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\java\lib\procWebiPublishing.properties file.

```bash
#webi scheduling/publishing properties
#Tue Dec 20 09:47:08 CET 2016
concurrency.minimum_documents_per_connection=20
processing.disable_refresh=false
concurrency.number_of_connections=1
filtering.keep_existing_filters=true
rendering.pdf.dpi=96
```

When the destination for a ZIP file is File System, FTP or Secured FTP and you are defining a schedule, you can choose between the options to automatically name the ZIP file based on BI Platform rule or to name it explicitly.

### 1.2.5 Events

Event-based scheduling and publishing provides you with additional control over scheduled documents and publications. You can set up events so that documents are processed only after a specified event occurs.

To successfully schedule a document with an event, you need to create the event first and then schedule the document. After you have created the event, you can select it as a mandatory condition to trigger the scheduling job. If and only if the event occurs, the BI Platform triggers the scheduling job.

You create events in the Central Management Console (CMC), and then select them in the BI Launch Pad when you schedule documents. For more information on how to create event, refer to the dedicated sections of the SAP BusinessObjects Business Intelligence Platform User Guide.

### 1.2.6 Scheduling server group

You can set the default server to run the scheduled document.

There are three available options regarding the server group:

- **Use first available server**: Runs the document on the server with the most resources free at the time of scheduling. This is the default selection.
- **Give priority to a server group**: Runs the document on servers in a particular server group. If no servers in the selected server group are available, the document runs on the next available server.
- **Use this server group**: Runs the document only on servers in a particular server group. If no servers in the selected server group are available, the document runs on the next available server.

As a best practice, if your deployment of the BI Platform uses federation and you want to run the document at the site where it is located, check the Run at origin site option.
1.2.7 Destinations

You can schedule a document instance to be sent to a specific destination.

In the schedule page, you can see different destinations such as BI Inbox, FTP and SFTP Server, File System etc.,

You can now choose multiple destinations as per your needs at one go and schedule the report. Even an administrator can perform this operation from Central Management Console while scheduling any BI report. This lets you optimize the number of schedules.

The destinations available depend on the destinations your system administrator has enabled and on your access rights. If your administrator specified a destination for an object, that destination option is listed in the Schedule dialog box. You may be able to set options for the destination or to select a different destination. For most destinations, you must provide additional information.

⚠️ Caution

The Destination tab can be slow to load when there are tens of thousands users existing in the system. If you experience this issue, please check SAP Note 2897486 to know why and how to fix it.

### Default Enterprise Location options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>Default Enterprise Location</td>
</tr>
<tr>
<td></td>
<td>The scheduled job will run on the Output File Repository Server (FRS). You</td>
</tr>
<tr>
<td></td>
<td>do not need to set additional options for this destination. Historical</td>
</tr>
<tr>
<td></td>
<td>instances are saved to the default Enterprise server but not to any other</td>
</tr>
<tr>
<td></td>
<td>destination.</td>
</tr>
</tbody>
</table>

### BI Inbox options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Destination</td>
<td>BI Inbox</td>
</tr>
</tbody>
</table>
### Option | Description
--- | ---
**Keep an instance in the history** | Saves a copy of this instance in the document’s history. This option in enabled by default. If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, uncheck the option. Even when this option is unchecked, the history keeps the instances of scheduled documents that weren’t sent because they failed to meet a delivery rule.

**Use default settings** | Uses the default Adaptive Job Server values for BI Inboxes. If you do not want to use the default Adaptive Job Server values, disable the option, and set the destination recipient options that appear.

**Available Recipients and Selected Recipients** | In the **Available Recipients** list, select users or user groups to send the instance to, and click > to add the users or groups to the **Selected Recipients** list.

**Find title (if available)** | Enter a recipient’s user name, full name, or email address in the **Find title** box to quickly locate the user in the **Available Recipients** list.

**Target Name** | ● To use a system-generated file name for the instance, select **Use Automatically Generated Name**.
● To choose a file name for the instance, select **Use Specific Name**, and enter a name or select variables for the file name from the **Add placeholder** list. You can select from several types of variables: **Title**, **ID**, **Owner**, **DateTime**, (your) **Email Address**, and (your) **User Full Name**, and **File Extension**.

**Send As** | ● To send a shortcut to the instance to recipients, select **Shortcut**.
● To send a copy of the instance to recipients, select **Copy**.

### Email options

### Option | Description
--- | ---
**Destination** | **Email**

**Keep an instance in the history** | Saves a copy of this instance in the document’s history. This option in enabled by default. If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, uncheck the option. Even when this option is unchecked, the history keeps the instances of scheduled documents that weren’t sent because they failed to meet a delivery rule.

**Use default settings** | Uses the default Adaptive Job Server values for emails. If you do not want to use the default Adaptive Job Server values, disable the option, and set the destination recipient options that appear.
<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
<td>Enter a return email address, or select variables for the email address from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name. Click a variable to add it. Separate email addresses with a semicolon (;). This option might be unavailable depending on your system configuration.</td>
</tr>
<tr>
<td>To</td>
<td>Enter each email address that you want to send the instance to, or select variables for the email address from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name. Click a variable to add it. Separate email addresses with a semicolon (;).</td>
</tr>
<tr>
<td>Cc</td>
<td>Enter each email address that you want to send a copy of the email and instance to, or select variables for the email address from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name. Click a variable to add it. Separate email addresses with a semicolon (;).</td>
</tr>
<tr>
<td>Bcc</td>
<td>Enter the email address of each undisclosed recipient, or select variables for the email address from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, and (your) User Full Name. Click a variable to add it. Separate email addresses with a semicolon (;).</td>
</tr>
<tr>
<td>Subject</td>
<td>Enter the subject of the email.</td>
</tr>
<tr>
<td>Message</td>
<td>For the body of the email, you can now customize your message content using the rich text editor with a custom toolbar having various formatting options.</td>
</tr>
</tbody>
</table>

**Note**

When you insert an image in the email, the image gets downloaded automatically if both sender and receiver have access to the image link used.

<table>
<thead>
<tr>
<th>Add Attachment</th>
<th>Select this check box if you want to add an attachment to the email message containing the instance.</th>
</tr>
</thead>
<tbody>
<tr>
<td>File Name</td>
<td>- To use a system-generated file name for the instance, check Use Automatically Generated Name.</td>
</tr>
<tr>
<td></td>
<td>- To select the file name for the instance, check Use Specific Name, and enter a name or select variables for the file name from the Add placeholder list. Check Add File Extension check box to automatically add the file extension to the instance file name. If you do not add a file extension, you might be unable to open the document.</td>
</tr>
<tr>
<td>Enable SSL</td>
<td></td>
</tr>
</tbody>
</table>
## FTP Server options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination</strong></td>
<td><strong>FTP Server</strong></td>
</tr>
<tr>
<td><strong>Keep an instance in the history</strong></td>
<td>Saves a copy of this instance in the document’s history. This option is enabled by default. If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, uncheck the option. Even when this option is unchecked, the history keeps the instances of scheduled documents that weren’t sent because they failed to meet a delivery rule.</td>
</tr>
<tr>
<td><strong>Use default settings</strong></td>
<td>Uses the default Adaptive Job Server values for FTP Servers. If you do not want to use the default Adaptive Job Server values, disable the option, and set the destination recipient options that appear. You can change the values in the Servers area of the CMC. For more information, refer to SAP BusinessObjects Business Intelligence Platform Administrator Guide.</td>
</tr>
<tr>
<td><strong>Host</strong></td>
<td>Enter the IP address of the FTP server host computer where you want to send the instance.</td>
</tr>
<tr>
<td><strong>Port</strong></td>
<td>Enter the port of the FTP server where you want to send the instance. The default is 21.</td>
</tr>
<tr>
<td><strong>User Name</strong></td>
<td>Enter a user name with access rights to upload the object to the FTP server.</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>Enter the password required to access the FTP server.</td>
</tr>
<tr>
<td><strong>Account</strong></td>
<td>Enter the account required to access the FTP server. The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.</td>
</tr>
<tr>
<td><strong>Directory</strong></td>
<td>Enter the path to the FTP directory where you want to send the instance.</td>
</tr>
</tbody>
</table>
| **File Name**           | - To use a system-generated file name for the instance, check **Use Automatically Generated Name**.  
  - To select the file name for the instance, check **Use Specific Name**, and enter a name or select variables for the file name from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, (your) User Full Name, and File Extension.  
  Check **Add File Extension** to automatically add the file extension to the instance file name. If you do not add a file extension, you might be unable to open the document. |
## File System options

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Destination</strong></td>
<td><strong>File System</strong></td>
</tr>
<tr>
<td><strong>Keep an instance in the history</strong></td>
<td>Saves a copy of this instance in the document’s history. This option in enabled by default. If you want the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server, uncheck the option. Even when this option is unchecked, the history keeps the instances of scheduled documents that weren’t sent because they failed to meet a delivery rule.</td>
</tr>
<tr>
<td><strong>Use default settings</strong></td>
<td>Uses the default Adaptive Job Server values for the file system. If you do not want to use the default Adaptive Job Server values, disable the option, and set the destination recipient options that appear.</td>
</tr>
<tr>
<td><strong>User Name</strong></td>
<td>Enter a user name with access rights to save files to the destination directory. You can specify a user name and password only for servers on Windows.</td>
</tr>
<tr>
<td><strong>Password</strong></td>
<td>Enter the user password that is required to access the destination directory. You can specify a user name and password only for servers on Windows.</td>
</tr>
<tr>
<td><strong>Directory</strong></td>
<td>Enter the path to a local hard disk location or mapped location or a UNC path to the directory where you want to send the instance. If you are scheduling a Web Intelligence document and want to create folders based on variables (such as the title of the instance, owner, date and time, or user names), use a placeholder. The placeholder is inserted after the text in the box.</td>
</tr>
<tr>
<td><strong>File Name</strong></td>
<td>To use a system-generated file name for the instance, check <strong>Use Automatically Generated Name</strong>. To select the file name for the instance, check <strong>Use Specific Name</strong>, and enter a name or select variables for the file name from the Add placeholder list. You can select from several types of variables: Title, ID, Owner, DateTime, (your) Email Address, (your) User Full Name, and File Extension. Check <strong>Add File Extension</strong> to automatically add the file extension to the instance file name. If you do not add a file extension, you might be unable to open the document.</td>
</tr>
</tbody>
</table>

### 1.2.8 Report Bursting

During publishing, data in documents is refreshed against data sources and personalized before a publication is delivered to recipients. This process is known as report bursting.

Depending on the size of a publication and how many recipients it is intended for, you can use the following report bursting methods:
• **One database fetch for all recipients**: All documents in a publication are refreshed once, 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 and the recommended option to minimize the impact of publishing on your database. The performance of this option depends on the number of recipients. This option is secure only when source documents are delivered as static documents. For example, a recipient who receives a Web Intelligence document in its original format can modify the document and view data associated with other recipients. However, if the document is delivered as a PDF file, data is secure.

• **One database fetch per recipient**: Data in a document is refreshed for every recipient. This report bursting method uses the data source logon credentials of the recipient to refresh data. For example, if there are five recipients for a publication, the publication is refreshed five times. This option is recommended for maximum security for delivered publications.

### 1.2.8.1 To select a report bursting method in the CMC

You select a report bursting method to determine how source documents are personalized, processed, and delivered in a publication.

**Prerequisites**

Before selecting a report bursting method, ensure that the publication contains Web Intelligence documents intended for Enterprise recipients and that profiles used for personalization have filter expressions.

**Context**

Report bursting methods use different filter types to personalize and process documents. For example, the *One database fetch for all recipients* option uses a report filter and the *One database fetch per recipient* option uses a query filter. Each filter type supports a different set of operators. If a filter expression uses an operator that the report bursting method does not support, the publication can fail.

You can select a report bursting method only in the Central Management Console (CMC).

**Procedure**

1. In the CMC, click Folders, and locate the publication to select a report bursting method for.
2. Right-click the publication job and select **Schedule**.
3. In the **Schedule** dialog box, expand **Additional Options**, and click **Advanced**.
5. Click Schedule.

1.2.9 Personalization

Personalization is the process of filtering data in source documents so that only relevant data appears to publication recipients.

With personalization, you alter the view of data but don’t change the data being queried from the data source.

The following illustration explains how personalization works. You have created a document that contains different types of data, all included in the document: 1, 2, and 3. You have to send the document to three different recipients, each one them receiving a single type of data. The first recipient receives data of type 1, the second recipient receives data of type 2, and the third recipient receives data of type 3.

To personalize source documents:

- For Enterprise recipients, make sure to apply a profile when you design a publication.

**Note**

Before you can use profiles to personalize data for Enterprise recipients, the profiles must be created and configured in the Central Management Console. If you need to add profiles, refer to Creating a profile for more information.
For 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.

To view a list of recipients who will receive unpersonalized publication instances after personalization, select Additional Options > Advanced in the New Publication dialog box, and select the Display users who have no personalization applied check box.

Related Information

Personalized placeholders for source document names [page 17]
Personalized placeholders for email fields [page 18]
To select personalized placeholders for source documents [page 32]
To select personalized placeholders for email fields [page 33]
To personalize a document with a global profile target [page 35]
To personalize a document by filtering fields [page 35]

1.2.9.1 Personalized placeholders for source document names

A placeholder is a container for variable data. Adding personalized placeholders to source file names helps recipients identify filtered data.

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. If a publication contains more than one source document, the Add placeholder list for Use Specific Name contains personalized placeholders only if all source documents were filtered on the same field.

The following personalized placeholders are available for reports:

- %filename_VALUE%
  For example, when selecting the Email Address placeholder, %SI_EMAIL_ADDRESS% appears in the Use Specific Name box. At run-time, the placeholder is replaced by the value of the field used to filter the document. This placeholder is unique for each recipient.

- %filename_NAME%
  For example, when selecting the Title placeholder, %SI_Name% appears in the Use Specific Name box. At run-time, the placeholder is replaced by the actual name of the field. This placeholder is the same for all recipients.

Related Information

To select personalized placeholders for source documents [page 32]
1.2.9.2 Personalized placeholders for email fields

A placeholder is a container for variable data. You can use personalized placeholders in the Subject box and the Message box when sending a publication via email.

For each filter used in a document during personalization, the following placeholders appear in the Add placeholder list:

- %Field - Query 1-VALUE%
  At run-time, the placeholder is replaced by the personalized value used to filter the document. This placeholder is unique for each recipient.

- %Field - Query 1-NAME%
  At run-time, the placeholder is replaced by the name of the field. This placeholder is the same for all recipients.

Before being able to use personalized placeholders in the Subject or Message box, make sure to personalize all source documents for the publication on the same field. If a publication contains several source documents, the Add placeholder list for the Subject and Message boxes displays personalization parameters only when all source documents are filtered on the same field(s).

Related Information

To select personalized placeholders for email fields [page 33]

1.2.10 Delivery rules for scheduling

Prevent the sending of erroneous or empty documents by setting delivery rules for scheduled documents. Define a status for the documents that fail to meet the rules so you can identify them and reschedule them, change the connection details, or take other, appropriate action.

You define conditions that the document must meet for it to be sent to the following destinations:

- BI Inbox
- Email
- FTP Server
- File System
- SFTP server

When the document fails to meet those conditions, it is not sent. You can choose one or both of the following conditions for a document:

- The scheduled content has been successfully refreshed and is not partial: The document is sent only when all the data providers for the document have been successfully refreshed. A document that contains data from incomplete results isn’t sent.

- The scheduled content contains data: The document is sent only when at least one report in the document contains data. An empty document isn’t sent.
When you select a condition, you can also define the status that displays in the history for a document that fails to meet the condition, as follows:

- **Warning** (by default)
- **Failed**

If a report in your document has multiple queries and one or multiple queries return partial results, when you select the *The scheduled content has been successfully refreshed and is not partial* rule, the report is sent in case of *Warning* status, but is not sent in case of *Failed* status.

When you select both conditions and the status of one condition is *Warning* while the status of the other condition is *Failed*, the history shows *Failed*.

### 1.2.11 Delivery rules for publishing

You can set delivery rules to fine-tune the processing and distribution of publications.

When you set delivery rules for a document, the publication is delivered to recipients only if it meets certain conditions. The BI platform supports several types of delivery rules. For Web Intelligence documents however, you can only set recipient delivery rules. There are two recipient delivery rules available:

- **Deliver individual document when condition is met**
- **Deliver all documents only when all conditions are met**

For each document of the publication, a delivery rule is always coupled with a condition. As a publisher, this is a way to fine-tune the publication process according to the recipients you want to deliver the publication to. There are four conditions you can choose from:

- **Always deliver**
- **Never deliver**
- **If scheduled content contains data**
- **If scheduled content has been fully refreshed**

If a document fails to meet the condition you have purposely selected, you can either cancel the delivery of that specific document or cancel the whole publication.

### 1.2.12 Publication extensions

A publication extension is a library of code that applies business logic to publications.

Use a publication extension to automatically customize publications after processing or delivery. You can use publication extensions to perform the following tasks:

- Merge documents of the same type (for example, merge 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 a publication job

You add publication extensions to publications in the Central Management Console (CMC) of the BI platform. (You cannot use publication extensions when designing a publication in the BI launch pad.) However, before
you can add a publication extension, the extension must be deployed on machines that run the Adaptive Processing Server. The location of the server varies, depending on the operating system:

- **On Windows**, the location is `\InstallDir\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\java\lib\`
- **On Unix**, the location is `\InstallDir\sap_bobj\enterprise_xi40\java\lib\`

Once an 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*.

### 1.2.12.1 To add a publication extension in the CMC

**Context**

**Procedure**

1. In the CMC, click *Folders*, and locate the publication to add a publication extension to.
2. Right-click the publication and select *Properties*.
3. Click *Additional Options > Publication Extension*.
4. Give a name for the extension.
5. In the *Class Name* box, enter the fully qualified class name for the extension.
6. **Optional**: In the *Parameter* box, enter a parameter name.
7. To use the extension after processing before or after delivery, above the *Before Publication Delivery* or *After Publication Delivery* list, click *Add*.
8. Click *Save*.

### 1.2.13 Publications for Live Office

When you design publications for use with SAP BusinessObjects Live Office, consider this information:

- Dynamic content documents can consist only of Web Intelligence documents in the original format.
- Dynamic recipients are not supported.
- The only destination option available is *Default Enterprise Location*.
- If recipients receive multiple publication instances after personalization, they can view only the first publication instance in the Live Office Client. Recipients who inherit multiple profile values from group membership may receive multiple instances. To avoid sending multiple instances, assign only necessary profile values to recipients.
1.2.14 Subscriptions

A subscription enables users who are not publication recipients to view the latest instance.

Enterprise recipients can unsubscribe from a publication at any time. Dynamic recipients can neither subscribe to or unsubscribe from a publication.

Users with the appropriate access rights can subscribe and unsubscribe other users. To subscribe to or unsubscribe from a publication, the following items are required:

- A BI Platform account
- Access to the BI Launch Pad or to the Central Management Console (CMC) in the platform
- View rights to see the publication
- Subscriber rights for the user account (Enterprise recipients)

Related Information

To subscribe to or unsubscribe from a publication [page 38]
To subscribe to or unsubscribe from a publication instance [page 39]

1.2.15 Viewing publications results

Results of a publications can be viewed by the publisher or recipients. A log file is also available for the publication job.

Viewing results as a publisher

After a publication runs, the publication history appears, listing publication instances, the times when the publication ran, and whether the publication succeeded or failed. In the Instance Time column, you can click a link to a publication instance to view instances generated for all recipients when the publication ran.

Viewing results as a recipient

The following table summarizes the ways you can view a publication.
## Viewing log files for publications jobs

Log files are useful for troubleshooting a publication and for identifying which recipients did not receive a publication instance. The BI Platform logs publication job information as each batch of personalized publication instances is processed and then consolidates the details into one or more log files. The maximum log file size is 10 MB and is non-editable. If you run a high-volume publication with many details, expect the publication instance to have several log files.

You can view log files for a publication instance in the following ways in the History dialog box:

- To view the last log file in a series, in the Status column, click the status (Success, Failed, or Running), and click View Log File at the bottom of the Instance Details dialog box. You can view the last log file while a publication is running.
- To view all log files, in the Instance Time column, click the link for a publication instance. Log files are listed after the personalized instances.

Log files are updated with new information every two minutes. If a publication job has been running less than two minutes, the log file may have a status of Pending.

### 1.3 Scheduling documents

You can schedule documents to automatically run at specified times. Each time a scheduled document runs successfully, an instance of that document is created.

An instance is a version of the document containing data from the time the document is run. You can access the list of instances in the document’s history. You can check the status of an instance to see whether the instance was sent and, if not, why not. If you have access rights to view documents on demand, you can view and refresh any instance to retrieve the latest data from the data source. By scheduling and viewing instances,
you ensure that documents 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 the BI platform, not to the Central Management Server (CMS) that your machine connects to. Before scheduling documents, confirm that your local time zone is selected in the BI Launch Pad preferences. Also, make sure that you have the required security rights to schedule documents to the different locations available: File System, FTP, SFTP, SMTP, BI Inbox or Google Drive. If you don’t have the access rights to view or to set your preferences; or schedule documents, contact your system administrator.

<table>
<thead>
<tr>
<th>For more information about</th>
<th>Read</th>
</tr>
</thead>
<tbody>
<tr>
<td>Schedule Documents</td>
<td>Scheduling documents</td>
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<tr>
<td>To schedule a document</td>
<td>To schedule a document [page 23]</td>
</tr>
<tr>
<td>The latest instance</td>
<td>To view instances of a document [page 24]</td>
</tr>
</tbody>
</table>

1.3.1 To schedule a document

When scheduling a document, options are sometimes set up with specific settings by default. Feel free to modify these settings according to your needs.

Prerequisites

Before scheduling a document, confirm that a context is set in the document. If the document has multiple contexts, refresh the document with the correct context before you schedule it.

⚠️ Caution

When using the navigation tabs to schedule a document, the Destination tab can be slow to load when there are tens of thousands users existing in the system. If you experience this issue, please check SAP Note 2897486 to know why and how to fix it.
Procedure

1. In the BI Launch Pad, browse to the document you want to schedule using either the Recent Documents section, the Documents tile, or the Folders tile.

2. Click \( \text{Schedule} \).

3. In the Instance Title tab, give a name to the instance you want to schedule. By default, the instance name is the document’s name.

4. Click Add in the Select delivery destinations section. By default, the destination is set to Default Enterprise Location.

5. Select a destination in the Destination drop down.

6. Set the Recurrence, Events and Scheduling Server Group options in their dedicated sections.

7. Click the Report Features tab.

8. Set the Output Format, Prompts and Delivery Rules options in their dedicated sections.

9. Click Schedule.

1.3.2 To view instances of a document

You can view instances of a scheduled document.

Procedure

1. In the BI Launch Pad, on the home page, click the Instances tile.
   You can also browse to the document you’re looking for using either the Recent Documents section, the Documents tile, or the Folders tile.

2. Click \( \text{History} \).

3. To view an instance, click \( \text{View} \).
   You can also check the latest instance of a scheduled document by clicking \( \text{View Latest Instance} \). You’ll be able to edit a Web Intelligence instance, but you won’t be able to save it and erase it. Use the Save As function instead.
1.3.3 To pause or resume an instance

You can pause and resume instances of scheduled documents with a *Pending* or *Recurring* status.

**Context**

For example, if a job server is down for maintenance, you can pause a scheduled instance to prevent the BI Platform from running the document. Scheduled jobs fail when the job server is not running. When the job server is running again, you can resume the scheduled instance.

**Procedure**

1. In the BI Launch Pad, on the home page, click the *Instances* tile. You can also browse to the document you’re looking for using either the *Recent Documents* section, the *Documents* tile, or the *Folders* tile.

2. Click > *History*.

3. Using the dedicated checkboxes, select one or multiple documents, and click next to the instance(s) you want to pause or resume.

4. Click *Pause* or *Resume*.

1.3.4 To delete instances from your BI Inbox

You can delete all instances from your BI Inbox.

**Procedure**

1. In the BI Launch Pad, click *BI Inbox*.

2. Click > *Organize* > *Delete All Messages*.

3. When prompted, click *OK* to confirm the deletion.
1.4 Publishing documents

Publishing documents means that you make them available to an audience by sending them via email or an FTP server and saving them to a disk. You can view, archive, retrieve or schedule published documents via the BI Platform.

Using the BI launch pad or the Central Management Console (CMC), you can tailor documents according to users and recipients you want to send documents to, schedule them to run at a specific time, and send documents to multiple destinations, including BI Inboxes and email addresses.

<table>
<thead>
<tr>
<th>For more information about</th>
<th>Read</th>
</tr>
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<tbody>
<tr>
<td>Publish Documents</td>
<td><em>Publishing [page 26]</em></td>
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</tr>
<tr>
<td>Best Practices</td>
<td><em>Best practices for publications [page 42]</em></td>
</tr>
</tbody>
</table>

1.4.1 About publications

A publication is a collection of documents that you send to a mass audience. Before distributing the documents, you, as the publisher, define the publication using a collection of metadata. The metadata include the publication source, its recipients, and the personalization applied.

Using publications, you send information to your organization efficiently. You can:

- Distribute information to users or groups of users and personalize the information each user or group receives.
- Deliver targeted business information to users or groups of users through a password-protected portal or across an intranet, an extranet, or the Internet.
- Minimize database access by eliminating the need for users to send process requests.

You can create publications using either the BI Launch Pad or the CMC.

Rights appendix

As a publisher, you own the publication and are responsible for scheduling it. You can view all publication instances for all recipients. Recipients can view only their own personalized publication instances.
These viewing rights ensure maximum security for publication data as only you, as a publisher, have rights to schedule publications and view all publication instances.

If you want to add yourself to a publication as a recipient, create two user accounts for yourself: a publisher account and a recipient account. The publisher account grants you access rights to design and to schedule publications, and the Recipient account grants you the access rights of a typical recipient.

The table below details the different rights necessary to each role to complete specific tasks.

### Publishing rights

<table>
<thead>
<tr>
<th>Role</th>
<th>Task</th>
<th>Rights required</th>
</tr>
</thead>
<tbody>
<tr>
<td>Document designer</td>
<td>Create a document to base a publication on</td>
<td>None</td>
</tr>
<tr>
<td>Document designer</td>
<td>Add a document to the BI platform</td>
<td>View right and Add right on the folder or category that the document will be added to</td>
</tr>
<tr>
<td>Document designer</td>
<td>Create a document to use as a dynamic recipient source</td>
<td>View right and Add right on the folder or category that the document will be added to</td>
</tr>
<tr>
<td>Publisher</td>
<td>Create a publication</td>
<td>• Add right on the folder where the publication is saved</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right on the users and the user groups intended as recipients</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right on the profile that will be used for personalization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right on documents in the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Schedule right on documents in the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Schedule right on Enterprise recipients</td>
</tr>
<tr>
<td>Role</td>
<td>Task</td>
<td>Rights required</td>
</tr>
<tr>
<td>--------------</td>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Publisher</td>
<td>Schedule a publication</td>
<td>Only the publisher should have the Schedule a publication right.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right, Schedule right, Add right, and Modify Security right on the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Delete Instance right on the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right on the users and the user groups intended as recipients</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right on the profile that will be used for personalization</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right and Schedule right on documents in the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right and Refresh right on the dynamic recipient source</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• View right and Refresh right on the document that the delivery rule is set for</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Data Access right on universes used by publication objects</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Data Access right on universe connections used</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When scheduling to a BI Inbox, Add right and View right on each recipient’s BI Inbox</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Modify the right users have to objects right on the folder containing the publication</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Subscribe right on recipients</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• When a publisher wants to print publication instances, Print right on Crystal report source documents</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• If you selected One database fetch per recipient, Schedule on behalf of other users right on Enterprise recipients</td>
</tr>
</tbody>
</table>

Scheduling and Publishing Documents in Web Intelligence
Scheduling and publishing documents
<table>
<thead>
<tr>
<th>Role</th>
<th>Task</th>
<th>Rights required</th>
</tr>
</thead>
</table>
| Publisher | Retry a failed publication instance             | - Edit right on the publication instance  
- View right, Subscribe right, Add right, and Modify Security right on the publication  
- Delete Instance right on the publication  
- View right on the users and the user groups intended as recipients  
- View right on the profile that will be used for personalization  
- View right and Schedule right on documents in the publication  
- View right and Refresh right on the dynamic recipient source  
- View right and Refresh right on the document for which the delivery rule is set  
- Data Access right on universes used by publication objects  
- Data Access right on universe connections used  
- When scheduling to a BI Inbox, Add right and View right on each recipient’s BI Inbox  
- Modify the right users have to objects right on the folder containing the publication  
- Subscribe right on recipients  
- When a publisher wants to print publication instances, Print right on Crystal report source documents  
- If you selected *One database fetch per recipient*, Schedule on behalf of other users right on Enterprise recipients |
<table>
<thead>
<tr>
<th>Role</th>
<th>Task</th>
<th>Rights required</th>
</tr>
</thead>
</table>
| Publisher | Redistribute a publication instance | • View right, Schedule right, Add right, and Modify Security right on the publication  
                        |                                | • When scheduling to a BI Inbox, Add right and View right on each recipient’s BI Inbox  
                        |                                | • View Instance right and Edit right on the publication instance               |
| Recipient | View a publication               | Rights that enable you to see a publication object in the BI platform: 
                        |                                | • View right on the publication  
                        |                                | • View Instance right on the publication  
                        |                                | 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 Enterprise recipients                                    |

### 1.4.2 To create a publication

#### Context

#### Procedure

1. In the BI Launch Pad, click the *Folders* tile.

2. Browse to the folder where to create the publication, and click `+` > *Publication*

   The *New Publication* dialog appears, with general property options displayed.

3. Give a name, keywords, and a description to the publication using the dedicated fields.

4. In the *Source Documents* section, click `+` and select one or more source documents to add to the publication.
Refresh At Runtime is enabled by default for each source document. This option refreshes the document against its data source when the publication runs. If you don’t want to refresh source documents at runtime, uncheck the box.

5. Click Add in the Selected delivery destinations section and select a destination in the dedicated drop down. By default, the destination is set to Default Enterprise Location.

6. Select the enterprise recipients and/or dynamic recipients you want to send the publication to in the dedicated sections.

7. Set the Recurrence, Events and Scheduling Server Group options in their dedicated sections.

8. Click the Report Features tab.

9. Set the Output Format, Prompts and Delivery Rules options in their dedicated sections.

   The Recurrence, Prompts, Formats, Events, Scheduling Server Group, and Destinations categories have the exact same content as that of the Schedule dialog when you schedule document. For more information about options available in these categories, use the links at the end of this topic to access the dedicated documentation.

10. Click Save & Close.

Related Information

Recurrence [page 5]
Prompts [page 6]
Formats [page 7]
Events [page 9]
Scheduling server group [page 9]
Destinations [page 10]

1.4.3 To open a publication

Context

Procedure

1. In the BI Launch Pad, click the Folders tile and navigate to the publication.

2. Click ➤ View.
1.4.4 To select an event to trigger a publication

Event-based scheduling gives you additional control over when a publication runs. Use events to trigger a publication to run or use a publication job to trigger an event.

Context

For more information about events, refer to *SAP BusinessObjects Business Intelligence Platform User Guide*.

Procedure

1. In the BI Launch Pad, click the **Folders** tile.
2. Browse to the folder containing your publication.
3. Click **next to a publication's name and click Schedule.**
4. Scroll down to the **Events** section.
5. Use the **Wait For** drop down to select the event that triggers the publication, or the **Trigger** drop down to select the event to trigger when the publication job has run.
6. Click **Schedule.**

1.4.5 To select personalized placeholders for source documents

You select personalized placeholders for a publication in the **Schedule** dialog.

Prerequisites

Before being able to use personalized placeholders in publication instance names, the publication's source documents must use personalization to filter data.

Context

When scheduling a publication instance, you can use placeholders in the **Use Specific Name** field for source documents, and combine text and multiple placeholders in a publication name.
Procedure

1. In the BI Launch Pad, click the Folders tile.
2. Browse to the folder containing your publication.
3. Click next to a publication’s name, then click Schedule.
4. Scroll down to the Destinations section.
5. Click Add.
6. Select a destination using the drop down.
7. In the Target Name section, check Use specific name and select a placeholder for the publication name from the Add Placeholder list.

   → Tip
   If the publication has multiple documents, you can add different placeholders for each document by clicking the Use specific name per document toggle.

8. Click OK.

1.4.6 To select personalized placeholders for email fields

You select personalized placeholders for a publication in the Schedule dialog.

Context

You can combine text and multiple placeholders in any email field. When scheduling a publication to an email destination, you can use placeholders in the From, To, Cc, Bcc, Subject, Message, and Use specific name fields.

Procedure

1. In the BI Launch Pad, click the Folders tile.
2. Browse to the folder containing your publication.
3. Click next to a publication’s name, then click Schedule.
4. Scroll down to the Destinations section, and click Add.
5. Select Email from the drop down list.
6. Set the destination options, including placeholders, in the System Details section.
7. Click OK.
1.4.7 To embed content from a dynamic source document in an email

You embed content from a source document for a publication in the Schedule dialog.

Context

You can embed content from dynamic content documents in the body of an email. You can embed an entire document or a single report tab.

Procedure

1. In the BI Launch Pad, click the Folders tile and browse to the folder containing your publication.
2. Click next to a publication’s name, then click Schedule.
3. Click the Report Features tab, and in the Output Formats section, click the format next to a document name to open the format selection widget.
4. Select HTML, and specify whether you want to publish the entire document or a single report using the dedicated drop down.
5. Click the General tab and scroll down to the Destinations section and click Add.
6. In the drop down, select Email.
7. Fill in the fields manually or select placeholders from the Add Placeholders list.
   In the From entry field, you can enter Robert, Publisher, or publisher@sap.com. If you enter a name, the name is appended to your email server—for example, Publisher@<EmailServer>.
8. To embed dynamic content in the Message entry field, place the cursor where you want to embed content, and in the Add Placeholder drop down, select Report HTML Content.
   %SI_DOCUMENT_HTML_CONTENT% appears in the Message entry field. When the publication runs, the placeholder is replaced by personalized content from the dynamic content document.
9. Optional: If the publication has other source documents, check Add attachment.
   Other source documents will be added to the email as attachments when the publication runs.
10. Click OK.
1.4.8 To personalize a document with a global profile target

You can personalize a document for Enterprise recipients by filtering with a global profile target.

**Prerequisites**

- Before being able to use a profile to personalize data for Enterprise recipients, the profile must be configured in the BI Platform. If a profile isn’t configured in the platform, personalization will fail.
- Before personalizing a document, make sure that the profile has a global profile target. For more information on how to create a profile, refer to Creating a profile in the Central Management Console Help Guide.

**Procedure**

1. In the BI Launch Pad, click the Folders tile and browse to the folder containing your publication.
2. Click next to a publication’s name, then click Schedule.
3. Click the Report Features tab.
4. Scroll down to the Personalization section, and select a global profile in the dedicated drop down. This profile maps the document to the universe field that’s filtered for Enterprise recipients.
5. Click OK.

1.4.9 To personalize a document by filtering fields

**Prerequisites**

Before being able to use a profile to personalize data for Enterprise recipients, the profile must be configured in the BI Platform. If a profile isn’t configured in the platform, personalization will fail.

**Context**

Static-value profiles can filter only string fields in source documents. To filter other types of fields, use expression profile values. If you map an incorrect type of field to the profile, personalization will fail. If you need profiles added to the platform, contact your system administrator.
Scheduling and publishing a document to .WID format generates a .WID file. Filters in .WID files can be removed by any recipient with appropriate security rights. When sending the .WID file to recipients or destinations, use filters carefully. For example, if you filter a document to limit the information that recipients can see and then send the published .wid file to recipients, any recipient with security rights to edit the document can remove or update the filter and access data that should not be visible.

**Procedure**

1. In the BI Launch Pad, click the **Folders** tile and browse to the folder containing your publication.

2. Click **●●●** next to a publication's name, then click **Schedule**.

3. Click the **Report Features** tab.

4. Scroll down to the **Personalization** section, and select a local profile in the dedicated drop down.
   *This profile maps the report field to profile values for Enterprise recipients.*

5. Under **Local Profiles**, for each profile listed in the **Title** column, select a profile from the list in the **Report Field** column.
   *This profile maps the report field to profile values for Enterprise recipients.*

6. Under **Local Profiles**, in the **Enterprise Recipient Mapping** column, select a profile.
   *This profile maps the document to the universe field (global profile target) that is filtered for Enterprise recipients.*

7. In the **Dynamic Recipient Mapping** column, select a profile.
   *The field in the source document is mapped to the column that contains corresponding values in the dynamic recipient source.*

8. Repeat steps 3 to 5 for each field to filter.

9. Click **OK**.

**1.5 Managing publications and instances**

After you’ve saved a publication, you can view a summary of its properties, such as the publication’s title, location, description, source documents, the number of recipients who will receive the publication (sorted by recipient type, Enterprise or dynamic), how the publication is personalized, the distribution format, and the destination.

Find the publication in the folders browser, and click **●●●** > **Properties** > **Summary**.
1.5.1 To test a publication

Use the test mode in the BI Launch Pad to send a publication to yourself before sending it to recipients.

Context

When testing a publication, you receive the exact same contact your recipients will receive. Destinations are automatically updated so that your BI Inbox or your email address is used instead of publication recipients’ BI Inbox or email address. If necessary, you can exclude selected recipients from the original group of recipients in test mode.

Procedure

1. In the BI Launch Pad, click the Folders tile and browse to the folder containing your publication.
2. Click next to a publication’s name, then click Test Mode.
3. Optional: Click Select in the Enterprise Recipients section to add Enterprise recipients.
4. Optional: Click Browse in the Dynamic Recipients section to add dynamic recipients:
   a. Fill in the fields.
   b. To add specific recipients, click Select recipients from list Select Recipients and select the recipients, then click OK.
5. Click Test.

Results

The publication runs in test mode and, once done, is sent to intended “test” recipients.

1.5.2 To view the progress or history of a publication

Context
**Procedure**

1. On the home page, click the **Instances** tile. The application displays a list with all jobs and basic information about each of them and shows their status (Success, Failed, or Running) in the **Status** column.

2. To view the log file of a job, click **Details**, and click **Download Log**.

**1.5.3 To subscribe to or unsubscribe from a publication**

To subscribe to a publication after it is scheduled, subscribe to its recurring instance or reschedule the publication.

**Prerequisites**

You must have appropriate access rights to a publication before you can subscribe to it.

**Context**

A subscription enables users who aren’t recipients of a publication, to view the latest instance. Enterprise recipients can unsubscribe from a publication at any time. Dynamic recipients can neither subscribe to nor unsubscribe from a publication. Users with the appropriate access rights can subscribe and unsubscribe other users. To subscribe to or unsubscribe from a publication, the following are required:

- A BI platform account
- Access to the BI Launch Pad in the platform
- View rights to the publication
- Subscriber rights for the user account (Enterprise recipients)

**Procedure**

1. In the **Folders** drawer on the **Documents** tab, locate and select the publication to subscribe to or unsubscribe from.

2. Do one of the following:
   - In the BI Launch Pad, right-click the publication and select **Subscribe or Unsubscribe**.
   - In the Central Management Console (CMC), select **Actions** ➤ **Subscribe** ➤ **Unsubscribe**.
1.5.4 To subscribe to or unsubscribe from a publication instance

After a recurring publication has been scheduled, Enterprise recipients can subscribe to its first recurring instance. For example, when a publication is scheduled to run twice a week, you can subscribe to the first publication instance but not the second one.

Prerequisites

You must have appropriate access rights to a publication before you can subscribe to its instances.

Context

Procedure

1. Do one of the following:
   ○ In the BI Launch Pad, right-click the instance and select History.
   ○ In the Central Management Console (CMC), select Actions History.
2. Do one of the following:
   ○ In the BI Launch Pad, right-click the instance and select Subscribe or Unsubscribe.
   ○ In the Central Management Console (CMC), select Actions Subscribe or Unsubscribe.

1.5.5 To view publications sent to the Default Enterprise Location

As a recipient, you can view only your own personalized publication instances in the BI platform.

Context
Procedure

1. In the CMC, go to the Folders area, right-click a publication, and select History.
2. Click the link in the Instance Time column.
3. Double-click the instance to view.

1.5.6 To view publications sent to a BI Inbox

Dynamic recipients can view publications sent to a BI Inbox. They cannot log on to the BI launch pad to view publication results.

Context

Procedure

1. In the BI launch pad home screen, click My Inbox.
2. Double-click the instance to view.

1.5.7 To redistribute a publication instance

When you want to resend an instance to a recipient but do not want to rerun an entire publication, you can redistribute successful publication instances to all or some of the original recipients.

Context

Only recipients specified when the publication was originally run can receive redistributed instances.

Procedure

1. Do one of the following:
   ○ In the BI launch pad, right-click a publication and select History.
In the Central Management Console (CMC), right-click a publication and select Actions > History.

2. Select a successful publication instance.

3. Do one of the following:
   - In the BI launch pad, right-click a publication and select More Actions > Reschedule.
   - In the Central Management Console (CMC), right-click a publication and select Actions > Reschedule.

4. Choose which recipients will receive redistributed instances:
   - To redistribute an instance to Enterprise recipients, click Enterprise Recipients, and click > to move recipients from the Available list to the Selected list.
   - To redistribute an instance to dynamic recipients:
     1. Click Dynamic Recipients, and confirm that columns mapped to recipient IDs, full names, and email addresses are correct.
     2. Select Use entire list to redistribute the publication to all dynamic recipients or click > to move recipients from the Available list to the Selected list to select from a restricted list of dynamic recipients.

5. Click Distribute.

Results

The publication history appears, and the redistributed instance has a status of Running. The date in the Instance Time column is updated to reflect the redistribution time.

1.5.8 To retry a failed publication

Prerequisites

Before retrying a failed publication, view the log file for the publication instance, address any errors, and reschedule the publication.

Context

Using the option to “Retry” failed instances of a publication, you can:

- overwrite the failed instance (Run Now and Reschedule create new instances whereas Retry uses the failed instance).
- process only the failed recipients, in case of a partial failure.
run the full job without creating a new instance, in case of a complete failure.

**Note**

You can also perform auto-retry by setting the *Number of retries allowed* and the *Retry interval in seconds* options under the *Recurrence* property of the publication. In case of a failure, it attempts to run the publication again.

**Procedure**

1. Select the failed publication instance.
2. Do one of the following:
   - In the BI launch pad, select > More Actions > History >.
   - In the CMC, select > Actions > History >.
3. Right-click on the failed instance and click *Retry*. The instance status changes to *Running*. Wait until the status changes to *Success*.

### 1.6 Best practices for publications

You can improve publication performance by modifying the Adaptive Processing Server, the Publishing Service, and the Publishing Post Processing Service.

**Adaptive Processing Server**

<table>
<thead>
<tr>
<th>Area</th>
<th>Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>CPU and memory</td>
<td>Move the Adaptive Processing Server to a faster machine that has more available CPUs and BI platform Feature Pack 3 or later installed. The server will automatically scale to use more CPUs.</td>
</tr>
<tr>
<td></td>
<td>Isolate the Publishing Service and the Publication Post Processing Service on dedicated Adaptive Processing Servers and remove unused services hosted on those servers. Each service will consume more shared resources (requests to thread pool, memory, and CPU consumption) on an Adaptive Processing Server, and publishing performance may improve.</td>
</tr>
</tbody>
</table>
**Publishing Service**

Because publishing is a hard-drive-intensive process, the Publishing Service should be installed on a machine with fast I/O or SAN disks for the FRS.

<table>
<thead>
<tr>
<th><strong>Area</strong></th>
<th><strong>Consideration</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Many publication instances that execute concurrently</td>
<td>If the underlying CMS, FRS, Adaptive Job Server, and report processing servers have been scaled appropriately, horizontally scale out the Publishing Service across multiple Adaptive Processing Servers, on one or more machines, to concurrently process more publication instances. A single publication job (for example, with one million 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.</td>
</tr>
<tr>
<td>Publications with many recipients</td>
<td>Vertically scale the Adaptive Processing Server on machines with more CPUs and RAM to concurrently process more recipients and to generate more jobs on the Adaptive Processing Server. You may need to scale the Adaptive Job Server and report processing servers accordingly to increase throughput. You may need to increase the Adaptive Processing Server’s heap size (that is, set <code>-Xmx</code> to 2 GB or more) when the server runs on a machine with more than eight CPU cores. The larger number of CPU cores enables the Adaptive Processing Server to spawn more threads and increase throughput. Note that more threads require more RAM.</td>
</tr>
<tr>
<td>Publishing cleanup option</td>
<td>For a large publication that does not need redistribution or to view artifacts in the report, do not select the default destination.</td>
</tr>
</tbody>
</table>
| 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 the database query into multiple, smaller queries, add the following command line option to speed disk delivery to all Adaptive Processing Servers that host the Publishing Service:  

```
-Dcom.businessobjects.publisher.scopebatch.max.recipients=<integer>
```
### Area
- Large publications with slow disk delivery to a single folder on Windows
- Large publications with slow disk delivery to a single folder that contains more than 300,000 files on Windows

### Consideration
- Search for "disable short file name generation" (article ID 210638) or for "NtfsDisable8dot3NameCreation" on Microsoft TechNet at [http://technet.microsoft.com](http://technet.microsoft.com) and follow the instructions.
- Search for "how NTFS works" at [http://technet.microsoft.com](http://technet.microsoft.com) and follow the instructions.

### Publishing Post Processing Service

The Publishing Post Processing Service is called when the Package as ZIP File checkbox (in the Schedule dialog box) and/or the Merge Exported PDF checkbox (in the Destinations dialog box) is selected or when custom post-processing plugins are enabled on a publication.

<table>
<thead>
<tr>
<th>Area</th>
<th>Consideration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Publications with both Package as ZIP File and Merge Exported PDF selected</td>
<td>Horizontally scale out the Publishing Post Processing Service to spread the ZIP and PDF merging workloads across multiple Publishing Post Processing Services hosted on different Adaptive Processing Servers.</td>
</tr>
</tbody>
</table>

### 1.6.1 Best practices for adding source documents

Below are best practices to help you add dynamic content documents to publications.

**Use publication log files to troubleshoot errors in failed publications**

When you schedule publications to run, log files are generated to record errors that may occur when the publications are processed. To view all log files for a publication instance, select More Actions ➔ History ➔ History dialog box, click the link for the instance in the Instance Time column. The instance details appear in a new window.

**View and schedule individual dynamic content documents before adding 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, confirm that the data source connection settings are correct. To do so:

1. In the CMC, select a document and click **Manage > Default Settings**.
2. In the **Default Settings** dialog box, click **Report universes** on the navigation panel.

In some cases, you may have to open a dynamic content document in the designer to configure the data source connection and to re-export the file to the CMS repository and overwrite the previous copy. For more information about configuring data source connections for dynamic content documents, see the designer documentation.

### Avoid unnecessary data refreshes

If a data refresh is unnecessary for a dynamic content document, in the **Source Documents** section, uncheck **Refresh At Runtime** for that document to improve overall publication performance.

### 1.6.2 Best practices for using dynamic recipient sources

Make sure to sort your dynamic recipients according to the **Recipient ID** column

In general, you should sort dynamic recipient sources by the **Recipient ID** column. This is especially important when you are running a high-volume publication because it can reduce the number of deliveries to recipients with multiple personalization values.

### 1.6.3 Best practices for sending and receiving email publication instances

**If possible, view embedded-content email-publication instances in Outlook 2003**

View embedded content in email publication instances in Outlook 2003 whenever possible. 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.
Contact your administrator to confirm that the email settings are configured properly for the Destination Job Server

Make sure that email settings are properly configured for the Destination Job Server. Publications intended for email destinations may fail because email has not been configured properly as a destination for the Adaptive Job Server. For more information, refer to the SAP BusinessObjects Business Intelligence Platform Administrator Guide.
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