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Portal Integration Kit Installation and Deployment Guide for SAP iView

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1 Document history

The following table provides an overview of the document changes.

Version	Date	Description
SAP BusinessObjects Business Intelligence platform 4.3	June, 2020	Initial release

2 Overview of Business Intelligence platform Portal Integration Kit for iView

This guide provides information about installing and configuring the SAP BusinessObjects Business Intelligence (BI) platform Portal Integration Kit for iView.

An iView (integrated view) is a logical portal content building block that represents a visual application (or part of one). iViews extend the reach of your portal to any available information resource, regardless of where the resource is stored. Users must have the appropriate access rights for each iView and for the system and application on which the iView is based.

The Portal Integration Kit for iView uses portlets to integrate the document viewing, editing, and scheduling features of BI platform in SAP NetWeaver Enterprise Portal.

The installation includes two main steps:

1. Importing BI content to SAP NetWeaver technology platform
2. Adding BI platform to the Enterprise Portal system landscape

For more information about BI platform architecture, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

3 Installation prerequisites

Several requirements must be met before installing the Portal Integration Kit for iView.

Area	Requirement
Administrator knowledge	<ul style="list-style-type: none">Working knowledge of the Enterprise Portal serverWorking knowledge of the BI platform system
Domain	<p>The following systems must be installed on the same domain:</p> <ul style="list-style-type: none">Business Intelligence (BI) platformSAP Business Warehouse (BW)—previously called "SAP Business Intelligence (BI)" or "SAP Business Information Warehouse (BIW)"Enterprise Portal—previously called "SAP Enterprise Portal (EP)"
Host machine	<p>The following systems must be installed on the same host machine:</p> <ul style="list-style-type: none">BI platformBWEnterprise Portal <div><p>Note</p><p>If BI platform is installed on a different host machine, you must install BI platform web-tier components on the BW and Enterprise Portal host machine.</p></div>
BI platform	SAP NetWeaver technology platform must be configured as an entitlement system in BI platform.
Single Sign-On (SSO)	SSO must be configured for both SAP NetWeaver technology platform and BI platform.
Portal environment	<ul style="list-style-type: none">The web session timeout for the Enterprise Portal server must equal the timeout set for the NetWeaver Web Application Server (WAS).Both the Enterprise Portal server and the SAP NetWeaver WAS must be configured with Secure Sockets Layer (SSL). Configuring SSL on only one of the servers is not supported.

For more information about BI platform, search for "authentication" and "managing applications" in the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

4 Accessing BI platform content in iViews

Before you can access Business Intelligence (BI) platform content in iViews, you must upload the BI platform .par file to the Enterprise Portal server, where it is converted to an .ear file that you can deploy to Enterprise Portal.

By default, the file is located at `\\<InstallDir>\SAP BusinessObjects Enterprise XI 4.0\warfiles\portlet\iviews\com.sap.businessobjects.iviews.par` in BI platform.

Note

SAP NetWeaver Enterprise Portal 7.3 and later does not support the .par file format. You must use the PAR Migration Tool in SAP NetWeaver technology platform to automatically convert BI platform .par files to the .ear file format.

4.1 To upload .par files to the SAP NetWeaver Enterprise Portal 7.0 server

When upgrading portal applications from SAP NetWeaver Enterprise Portal 7.0, you must upload the .par file from Business Intelligence (BI) platform to the SAP NetWeaver Enterprise Portal server.

The `com.sap.businessobjects.iviews.par` file contains content from the BI platform repository. Once the file is uploaded to SAP NetWeaver Enterprise Portal, it is converted to a .war file (packaged in an .ear file).

1. In SAP NetWeaver Enterprise Portal, select ► [System Administration](#) ► [Support](#) .
2. Select ► [Portal Runtime](#) ► [Administration Console](#) .
3. In the [Archive Uploader](#) area, locate and select the `\\<InstallDir>\SAP BusinessObjects Enterprise XI 4.0\warfiles\portlet\iviews\com.sap.businessobjects.iviews.par` file, and click [Upload](#).

A message appears, indicating the `com.sap.businessobjects.iviews.par` file was successfully uploaded.

Use the PAR Migration Tool to convert the uploaded .par file to a .war file that's packaged in an .ear file.

4.2 SAP NetWeaver Enterprise Portal (7.3 and above) and the .par file

When upgrading portal applications from SAP NetWeaver Enterprise Portal 7.3, use the PAR Migration Tool to convert Business Intelligence (BI) platform .par files to .war files.

Because SAP NetWeaver Enterprise Portal 7.3 and later does not support the .par file format, .par files must be converted to .ear file format.

Note

For more details, refer following SAP Note: [1694773](#)

4.2.1 To upload the .par file to SAP NetWeaver Enterprise Portal 7.3 and above

You must upload the .par file to SAP NetWeaver Enterprise Portal 7.3, and then you can deploy the converted .ear file on Enterprise Portal.

1. In SAP NetWeaver Enterprise Portal, go to ► [System Administration](#) ► [Support](#) ►.
2. Click [PAR Migration Tool](#).
The PAR Migration Tool wizard appears.
3. Add files to the [Available Files](#) list in one of the following ways:
 - Upload files from imported transport packages
 - Browse for and upload individual .par files
 - Specify the path of a local folder from which to upload the files
4. Select the files to migrate and move them to the [Selected Files](#) list.
5. Click [Next](#).
The files are migrated and appear in the [Migrated Files](#) list.
6. Select the files to download, and click either [Download](#) or [Download All](#).
The files are downloaded and can be deployed on SAP NetWeaver Enterprise Portal.

After deploying the files, you can run iView applications.

4.2.2 To deploy the .ear file to SAP NetWeaver Enterprise Portal 7.3

Use a deployment script in Enterprise Portal to deploy the `com.sap.businessobjects.iviews.ear` file.

To locate the required P4 port of Enterprise Portal, perform one of the following actions:

- Add **4** to the port number of the portal application server. For example, use "50204" if the portal application server port number is "50200."

- Access the [SAP System Information](#) page at `http://<PortalHostName>:<port>/sap/monitoring/SystemInfo`
1. On a command line, go to the `\\<InstallDir>/usr/sap/<SID>/<InstanceNumber>/j2ee/deployment/scripts` directory.
 2. Execute the following command:

```
deploy <user>:<password>@<host>:<P4Port> <ArchivePath> [-no_start]
```

Argument	Description
user	The user executing the command. This user must have administrative privileges.
password	The password associated with the user executing the command
host	The target AS Java host
P4 port	The target P4 port number
archive	The path to the archive
no_start	Indicates whether to start modules after they are deployed

Example

```
deploy J2EE_ADMIN:pass123@myhost:50204 com.sap.businessobjects.iviews.ear
-no_start
```

4.2.3 To add BI platform to the SAP NetWeaver Enterprise Portal system landscape

After uploading the `.par` file to the SAP NetWeaver Enterprise Portal server, you must add Business Intelligence (BI) platform to the SAP NetWeaver Enterprise Portal system landscape.

1. Navigate to [System Administration](#) [System Landscape](#) [System Landscape](#).
2. Expand the [Portal Content](#) tree structure.
3. Right-click and select [New](#) [Folder](#).
4. Enter the [Folder Name](#), [Folder ID](#) and [Folder ID Prefix](#).
5. Click [Finish](#) and click [Close](#).
6. Right-click on the created folder and select [New](#) [System](#).

7. Select *SAP BusinessObjects System Template* and click *Next*.
8. Enter *System Name* and click *Next*.
9. In the *Defined Aliases* page, enter the alias for the system.
10. Click *Add* and *Next*.
11. Clear the check box for *Run connection test after clicking Next* and click *Finish*.
12. Right-click on the created system and select *Properties*. Enable *All* instead of *Basic*.
13. Click on *Modify Properties* and set the following properties by selecting the category in *Show Properties* drop-down.

a. *SAP BusinessObjects*

1. Enter the *Web Application Server URL*

Example: <http://vanpgvmwin048.product.businessobjects.com:8080/BOE> ➡

📘 Note

Input the fully qualified BOE URL including protocol server, port and path to web bundles.

2. Enter the *Embed Secret*.

📘 Note

An embedded password (Secret1) needs to be shared between NW and BI. The Embed Secret should be set to the same value as in Tomcat. Follow the below steps to configure Embed Secret in Tomcat.

1. In the BI server (Tomcat), go to `<InstallDir>\tomcat\webapps\BOE\WEB-INF\conf\default` and copy the files `global.properties` and `OpenDocument.properties` and paste them in `<InstallDir>\tomcat\webapps\BOE\WEB-INF\conf\custom`
2. Edit the files copied in the custom folder with the following values as explained below:
 - Open `OpenDocument.properties` in `<InstallDir>\tomcat\webapps\BOE\WEB-INF\conf\custom` and set `logon.allowInsecureEmbedding=true` and save the file.
 - Open `global.properties` in `<InstallDir>\tomcat\webapps\BOE\WEB-INF\conf\custom` and set a value for `logon.embed.secret` and save the file.
Example: `logon.embed.secret=Secret1`
 - Clear Tomcat cache and restart Tomcat.

📘 Note

Leaving the value blank in both the iView properties and Tomcat doesn't constitute a valid secret and leads to an error.

3. Click *Save* and *Close*.

📘 Note

The user is logged on to the SAP NetWeaver Enterprise Portal and wants to access BI Launchpad iView's without being prompted for login credentials again. Below properties must be configured in the system.

1. Connector

- *Application Host* Example: NW73
 - *Gateway Host* Example: product.businessobjects.com
 - *Gateway Service* (optional). Example: sapgw00
 - *Logical System Name* Example: R37CLNT800
 - *SAP Client* Example: 800
 - *SAP System ID (SID)* Example: R37
 - *SAP System Number* Example: 00
 - *System Type* Example: SAP_BW
2. User Management
- Logon Method - SAPLOGINTICKET

5 Deploying portlets

iViews are generally built from portal components called portlets. Portlets are pieces of code that make an iView functional and give it the ability to retrieve and to display content.

By default, you can deploy two types of portlets on your portal server—Document Viewer and Document List. However, before you can deploy a portlet, you must import iView templates to Enterprise Portal.

Document Viewer portlet

Document Viewer is the simplest type of portlet to create. It displays one default report that the portal page designer or administrator configured at deployment.

Users view the default report on the iView portal page and can navigate the report normally. They cannot navigate to other reports, unless the default report contains links to the reports.

Document List portlet

Features of the Document List portlet are similar to BI platform features. Based on access rights assigned, users can view and navigate reports, view personal folders, browse categories, edit reports, schedule report refreshes, manually refresh reports, search Business Intelligence (BI) content, and set user preferences.

5.1 To import iView templates to your portal server

1. In Enterprise Portal, go to ► [System Administration](#) ► [Transport](#) ► [Import](#) ►.
2. In the [Source for Package Files](#) list, select [Client](#).
3. Locate and select the \\<InstallDir>\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\warfiles\portlet\iviews\com.sap.businessobjects.iviews.templates.epa file, and click [Upload](#).
4. Click [Import](#).
The import may take some time. A message appears, indicating the com.sap.businessobjects.iviews.templates.epa file was successfully imported.

5.2 To deploy the Document Viewer portlet

Use the SAP BusinessObjects Document Viewer template to deploy the Document Viewer portlet.

1. In Enterprise Portal, select ► *Content Administration* ► *Portal Content* ▾, and select the desired folder for which you want to create the iViews.
 2. Right-click *New* and select *iView*.
 3. Select *iView template*, and click *Next*.
 4. Select *SAP BusinessObjects Document Viewer Template*, and click *Next*.
 5. Enter values for the *iView name*, *ID*, and *Prefix* options.
 6. Click *Next*.
 7. Enter values for the *System Alias*, *OpenDocument Path* (`OpenDocument / opendoc / openDocument / jsp`), and *Document ID Type* options.
 8. Click *Next*.
 9. Perform one of the following actions:
 - If *Document ID (CUID)* is selected, locate and select a BI platform document to display.
 - If *Document ID (CUID)* is not selected, enter the SAP Business Warehouse ID (`bw_id`) to display.
 10. On the *Summary* page, select *Open for editing when wizard completes*, and click *Finish*.
 11. Click *Preview*.
- Once deployed, the report appears in a separate window.

5.3 To deploy the Document List portlet

Use the SAP BusinessObjects Document List template to deploy the Document List portlet.

1. In Enterprise Portal, select ► *Content Administration* ► *Portal Content* ▾
 2. Expand the *Portal Content* tree structure.
 3. Right-click *New* and select *iView*.
 4. Select *iView template*, and click *Next*.
 5. Select *SAP BusinessObjects Document List Template*, and click *Next*.
 6. Enter values for the *iView name*, *ID*, and *Prefix* options.
 7. Click *Next* and *Finish*.
 8. Open the object for editing.
 9. Click *Modify* and select *All* instead of *Basic*.
 10. Select *SAP BusinessObjects* category in the *Show Properties* drop-down.
 11. Enter values for the *System Alias*.
 12. Click the iView created and *Preview*.
- Once deployed, the report appears in a separate window.

5.4 To configure SAP NetWeaver Enterprise Portal Server 7.3 for IE 10 and IE 11

By default, Internet Explorer 10 and Internet Explorer 11 displays Business Intelligence (BI) launch pad iViews in compatibility mode, but BI launch pad features are available only in standard mode.

For SAP NetWeaver Enterprise Portal Server version 7.3, you must configure IE 10 and IE 11 for standard mode, before BI launch pad can be viewed properly.

1. Create a new portal page.
2. In SAP NetWeaver Enterprise Portal, select ► *Content Administration* ► *Portal Content* ► *Content Provided by SAP* ► *Admin Interfaces* ► *Admin iView Templates* ► *Browser Document Mode* ►, and add the `Browser Document Mode` property to the portal page.
3. Change the `Browser Document Mode` property to `IE=edge,requiresActiveX=true`.

Internet Explorer 10 and Internet Explorer 11 displays BI launch pad iViews in standard mode (instead of compatibility mode).

6 Configuring the BI platform repository for knowledge management and collaboration

SAP NetWeaver Enterprise Portal provides knowledge management and collaboration capabilities via SAP NetWeaver Enterprise Portal. SAP NetWeaver Enterprise Portal uses the BI platform repository.

This section describes how to install, configure, and maintain the BI platform repository in SAP NetWeaver Enterprise Portal. This information is intended for the SAP NetWeaver Enterprise Portal administrator who is responsible for configuring repository managers.

6.1 Overview of BI platform configuration for SAP Enterprise Portal

These general steps are required when configuring the BI platform repository for SAP NetWeaver Enterprise Portal.

Administrators must be experienced with Enterprise Portal and BI platform before configuring BI platform for knowledge management and collaboration.

1. From the Administration Console in Portal Runtime, upload the `BusinessObjectsKM.par` file to Enterprise Portal.
2. In the Repository Manager, create a new instance.
To save time, duplicate an instance:
 - a. Make sure *Property Search Manager* is not selected.
This is because the `Property Search Manager` class in some Enterprise Portal deployments may prevent the `BusinessObjectsKM.par` file from starting properly.
 - b. Select the service "layout."
 - c. Enter the host and port of the Central Management Server (CMS) in BI platform to connect to.
 - d. In the OpenDocument URL and the web service URL, replace `WEB_SERVER_AND_PORT` with the host name and port number of the web server.

Note

Confirm that the specified SAP system ID and the Enterprise Portal certificate were imported to the CMS. For more information, search for "supplementary configuration for ERP environments" in the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

3. On the *KM Content* page, right-click the repository and select ► *Details* ► *Settings* ► *Presentation* ►.
4. Click *Select profile*, select the *BOBJELayout* layout, and select the *Apply settings to all subfolders* check box.

6.2 To install the BI platform repository

1. Log on to Enterprise Portal with administrator rights.
2. In the Administration Console, select ► [System Administration](#) ► [Support](#) ► [Portal Runtime](#) ►.
3. Locate and select the `BusinessObjectsKM.par` file, and click [Upload](#).

The installed `businessObjectsKM.par` file is located at `<InstallDir>\SAP BusinessObjects Enterprise XI 4.0\warfiles\KMC\`.

6.2.1 To undeploy the BI platform repository from SAP Enterprise Portal

In the Administration Console, select the `BusinessObjectsKM.par` file, and click [Clean](#).

6.3 Configuring the BI platform repository

To configure the Business Intelligence (BI) platform repository, you must configure options in SAP Enterprise Portal and BI platform and a SAP Business Warehouse(BW) system.

For example, the following actions occur between SAP NetWeaver Enterprise Portal, BI platform, and BW:

1. When a user logs on to SAP NetWeaver Enterprise Portal, the portal issues a logon ticket.
2. When the user opens the BI platform repository, the logon ticket—and configured `SAP_System_ID` and `SAP_Client` values—are passed to BI platform.
3. The logon ticket is validated against the BW system specified by the `SAP_System_ID` value.

6.3.1 To configure SAP BW for the BI platform repository

1. Confirm that the SAP BW system and Enterprise Portal have the same domain.
For example, the domain names might be `server1.domain.com` and `server2.domain.com`.
2. Confirm that the user has the same name on the BW system and the Enterprise Portal system.

Note

If a Enterprise Portal user doesn't exist in the BW system, create the user in BW.

3. Confirm that the Enterprise Portal certificate was imported to the BW system:
 - a. In BW, select ► [System Administration](#) ► [System Configuration](#) ► [Keystore Administration](#) ►.
 - b. Select the `SAPLogonTicketKeypair-cert` file, click [Download verify.der File to local machine](#), and then uncompress the `verify.der.zip` file on your local machine.

- c. In the SAP system in which to authenticate the Enterprise Portal user, start transaction STRUSTSSO2.
- d. Select *Import Certificate* for the system PSE.
- e. Locate the downloaded `verify.der` file, and set encoding to binary for the file.
- f. Click *Add to PSE* and *Add to ACL*.
In the dialog box that appears, the system ID is the portal's system ID (generally the same as CN) and the client is 000.

After a successful logon to Enterprise Portal, the MYSAPSSO2 cookie appears and can be verified by the SAP system.

6.3.2 To configure BI platform for SAP NetWeaver Enterprise Portal

Enterprise Portal and the BI platform web application server must be in the same domain.

1. Confirm that the SAP BW system and role were imported for the Enterprise Portal user:
 - a. Add the BW system as an entitled system in BI platform.
 - b. Import the corresponding role to BI platform.
 - c. In the BI platform repository configuration, specify the names of the Central Management Server (CMS) in BI platform and the BW system ID.
2. To enable single sign-on when viewing a report, set `opendoc.sessioncookie.enabled` to `false` in the `web.xml` file for the OpenDocument web application.
3. If you want users to be able to log on to BI platform web applications via HTTPS:
 - a. Download the certificate of the BI platform web service.
 - b. Enter the following command to import the certificate to a keystore:

```
%java_home%\bin\keytool -import -v -trustcacerts -alias tomcat -file
server.cer -keystore client.keystore -keypass password -storepass password
```

- c. Put the keystore file on the Enterprise Portal server.
- d. In the BI platform configuration in the Repository Manager, specify the location and password of the keystore file.

6.3.3 To configure the client machine

On all client-machine browsers, enable cookies.

6.3.4 To configure SAP NetWeaver Enterprise Portal for the BI platform repository

- The Central Management Server (CMS) in BI platform, web service URL, OpenDoc URL, and dispatch URL can be on different machines.

- Changes to the CMS, SAP_System_ID, SAP_Client, and starting folder ID settings take effect when the user logs off and logs back on.
1. Select **System Administration > System Configuration > Knowledge Management > Content Management > Repository Managers**, and select the BI platform repository.
 2. In the **CMS** box, enter the name of the CMS to connect to.
One BI platform repository maps to one BI platform CMS.

→ Tip

To view objects for multiple CMSs, create multiple BI platform repository instances. For example, enter **<cms_host_name>:<port>**

3. In the **Prefix** box, enter the prefix of one instance, which will be displayed in the KM Content iView.
For example, enter **/BOERM**
4. In the **Starting folder SID** box, enter the SI_ID of the object in BI platform to use as the starting folder in KM.
For example, enter 23
5. In the **Authtype of User for index** box, enter the type of authentication to be used when accessing the BusinessObjects Repository.
6. In the **Authtype of User for subscription** enter the type of authentication to be used when accessing the BusinessObjects Repository.
7. In the **EP user to do index** enter the ID of your BusinessObjects Administrator account.
8. In the **EP user to do subscription** enter the ID of your BusinessObjects Administrator account.
9. In the **SAP Client** box, enter the 3-digit client number of the BW system used for single sign-on (SSO).
10. In the **SAP System ID** box, enter the 3-digit system ID of the BW system used for SSO.
11. In the **Web Service URL** box, enter the URL of the web service provider used to log a SAP NetWeaver Enterprise Portal user on to BI platform.
For example, enter **http://<WebServer>:<port>/dswsboobje/services/**
12. In the **User password for index** enter the password for the BusinessObjects Administrator account.
13. In the **User password for subscription** enter the password for the BusinessObjects Administrator account.
14. In the **OpenDoc URL** box, enter the BI platform URL for an object or its latest instance.

Java example:

```
http://host/OpenDocument/opendoc/openDocument.jsp
```

.NET example:

```
http://host/OpenDocument/opendoc/openDocument.aspx
```

15. In the **Property Search Manager** box, enter the class name of the Property Search Manager.
This option cannot be set to **Not Set**.
16. For **Repository Services**, enable the required services:
 - To enable BI platform-specific commands, select **layout**.
 - To enable searching in the BI platform repository, select **properties**.
 - To enable collaboration on objects in the BI platform repository, select collaboration options.
For example, select **comment**, **discussion**, and **rating**.
 - To enable subscriptions to BI platform instances, select **subscription**.

17. In the [Keystorefile](#) box, enter the location of the keystore file for connecting to the CMS with the HTTPS web service.
18. In the [Keystorepwd](#) box, enter the password for the keystore.
19. To use HTTPS for logon to BI platform, perform the following actions:
 - a. Download the certificate of the BI platform web service.
 - b. Import the certificate to a keystore, using the following command:

```
%java_home%\bin\keytool -import -v -trustcacerts -alias tomcat
-fileserver.cer -keystore client.keystore
-keypass password -storepass password
```
 - c. Put the keystore file on the SAP NetWeaver Enterprise Portal server.
 - d. In the BI platform repository configuration, enter the location and password of the keystore.

6.3.5 To configure the BI platform layout

To make BI platform properties and commands appear properly, you must change layout settings for your configured BI platform repository to the BI platform layout.

1. Select [Content Administration](#) [KM Content](#), right-click the BI platform repository, and select [Details](#).
2. Select [Settings](#) [Presentation](#), click [Select Profile](#), and then select [BOBJELayout](#).
3. To apply the layout to all folders in the BI platform repository, select the [Apply settings to all subfolders](#) check box.
4. Click [Save](#).

6.3.6 Configuring collaboration

Collaboration enables users to discuss objects stored in the BI platform repository. Collaboration features include comments, feedback, personal notes, and ratings.

To enable collaboration for users, set options in the BI platform repository ([Content Management](#) [Repository Managers](#)).

6.3.7 Configuring subscriptions

A subscription to a folder or document notifies users (via email or SMS) about changes to it. Subscriptions can be set to send notifications at intervals or when triggered by events.

Requirements for subscriptions are:

- The Subscription Service must be enabled for the BI platform repository ([Content Management](#) [Repository Managers](#)).
- Users must choose to subscribe to the BI platform repository.

- Your mail server or SMS server must be configured to allow subscriptions.

6.4 To maintain BI platform repository instances

1. Select ► *System Administration* ► *System Configuration* ► *Knowledge Management* ► *Content Management* ► *Repository Managers* ►, and select the BI platform repository.

A predefined instance of the BI platform repository appears. You can modify the predefined instance or create a new one.

2. To create a new instance, perform the following actions:
 - a. Click *New*.
 - b. Set options as needed, and click *OK*.

Note

All changes, except to Repository Services options, take effect immediately. (Changes to Repository Services options require restarting the J2EE server before they take effect.)

3. To modify an existing instance:
 - a. Select an instance, and click *Edit*.
 - b. Modify options as needed, and click *OK*.

7 Knowledge management and collaboration on SAP NetWeaver Enterprise Portal

SAP NetWeaver Enterprise Portal provides knowledge management and collaboration capabilities via SAP NetWeaver Enterprise Portal—previously called "SAP NetWeaver Enterprise Portal (EP)."

SAP NetWeaver Enterprise Portal is no longer being developed (no new features or upgrades are planned). Current Enterprise Portal users should consider using instead the iView Document List portlet in Business Intelligence (BI) platform, which provides the same access to data through a portal interface and more flexibility and features.

7.1 To log on or log off the BI platform repository in SAP Enterprise Portal

If you do not log out of a Business Intelligence (BI) platform repository session, it is automatically terminated, based on timeout settings.

After the Enterprise Portal administrator has configured a BI platform repository, Enterprise Portal users can access the repository through knowledge management content or a knowledge-management iView portal, using single sign-on (SSO).

Perform one of the following actions:

- To log on, click [Logon](#) on the [View](#) menu or the [BusinessObjects](#) menu.
- To log off, click [Logoff](#) on the [View](#) menu or the [BusinessObjects](#) menu.

7.2 Navigating BI platform in SAP NetWeaver Enterprise Portal

You can use breadcrumbs at the top of the screen or the tree list to browse Central Management System (CMS) folders in the Business Intelligence (BI) platform repository.

After logging on to BI platform, the following default folders are visible:

- **Inbox:** Your personal inbox
- **My Favorites:** Your Favorites folder
- **<RootFolder>:** The root folder containing knowledge management content.

Note

You can define any subfolder as the root folder (for example, the `Public` folder) in an iView portal.

When the navigation view is set to *By Category* (instead of *By Folder*), the following default categories are visible:

- Personal
- Corporate

7.2.1 To toggle navigation between the folder view and the category view




By default, navigation is set to *By Folder*. When you change the navigation type, the new setting does not take affect until you log off the repository and log on again.

Before you can change the navigation method, you must be logged on to the Business Intelligence (BI) platform repository.

1. In the repository, select *View*, and then select *By Folder* or *By Category*.
The knowledge management content home page appears, with content displayed in the view you selected.
2. Log off BI platform and log on again.

7.3 Summary of BI platform tasks

This table provides quick instructions for common tasks in Business Intelligence (BI) platform.

Task	Description
<i>Refresh</i>	Select  <i>Folder</i>  to display the latest view of information in BI platform. If the folder you are browsing has changed, the changes appear after you click <i>Refresh</i> .
<i>View</i>	Right-click a document and select <i>View</i> to view the document on demand, in a new window.
<i>View latest instance</i>	If a document is scheduled and has at least one successful instance, select <i>View Latest Instance</i> to display the most recent successful instance, in a new window. <div> Note You can select <i>View Latest Instance</i> only for documents, not folders.</div>
<i>Schedule</i>	Right-click a document and select <i>Schedule</i> to schedule a new instance of an object.

Task	Description
	You must have the appropriate access rights to schedule documents.
History	<p>Right-click a document and select History to display the history of the document's scheduled instances.</p> <p>If History is not available in the context menu, the document does not have any instances.</p>
Create	Create new documents.
Copy or Move	Copy or move documents or folders from one BI platform repository to another repository.
Delete	Delete documents or folders in the BI platform repository.
Details	<p>Right-click an object and select Details to display detailed information about the object, including its name, description, the last date it ran, and its size.</p> <p>The details panel also displays collaboration information for the object when the Collaboration Service is enabled for BI platform.</p>
Download	To download a copy of a document to your local machine, right-click the document and select Download .

7.3.1 To upload a document to BI platform

You can upload documents (including Voyager, Interactive Analysis, Crystal report, text file, and Microsoft documents) to Business Intelligence (BI) platform.

1. To upload a document, select [Folder > Upload Local Document](#).
2. Locate the document to upload, and click [Upload](#).

7.3.2 To copy or move an object to BI platform





You can copy and move documents or folders from one Business Intelligence (BI) platform repository to another repository.

Before you can copy or move an object, you must have the appropriate access rights.

When a folder is copied or moved, the objects in the folder are copied or moved in the BI platform repository.

Note

For some Enterprise Portal repositories, the name of a source object cannot be passed. In this case, the CUID of the new object in BI platform is used as the name.

1. Select the check box beside each document or folder to copy or to move.
You can select multiple check boxes to copy or to move multiple documents or folders at the same time.
2. Select  [Selection](#) > [Copy](#)  or  [Selection](#) > [Move](#) .

7.3.3 To delete an object from BI platform

You can delete documents and folders from Business Intelligence (BI) platform. When you delete a folder, its contents are also deleted.

Before you can delete an object, you must have the appropriate access rights.

Note

To quickly delete a single object, right-click the object and select [Delete](#).

1. Select the check box beside each document to delete.

Note

Select multiple check boxes to delete multiple documents at the same time.

2. Select  [Selection](#) > [Delete](#) .

7.3.4 To search for a document in BI platform

You can perform a "fuzzy" search of content in Business Intelligence (BI) platform, based on the properties of documents.

The Search Service must be enabled in BI platform.

Note

This task may require additional administrative settings. Contact your administrator for more information.

1. Right-click a folder and select [Search from here](#).
2. In the window that appears, enter keywords to search for.

7.3.5 To subscribe to a document in BI platform

Subscribe to a document in Business Intelligence (BI) platform when you want to be notified that changes have occurred—for example, document creation, edits, or deletions.

The Subscription Service must be enabled in BI platform.

Note

This task may require additional administrative settings. Contact your administrator for more information.



1. In BI platform, right-click a document and select [Subscribe](#).
2. In the window that appears, configure the subscription options.

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