SAP BusinessObjects

Business Intelligence Launch Pad User Guide

- SAP BusinessObjects Business Intelligence Platform 4.1

2013-05-06

SAP

Copyright

© 2013 SAP AG or an SAP affiliate company. All rights reserved. No part of this publication may be reproduced or transmitted in any form or for any purpose without the express permission of SAP AG. The information contained herein may be changed without prior notice. Some software products marketed by SAP AG and its distributors contain proprietary software components of other software vendors. National product specifications may vary. These materials are provided by SAP AG and its affiliated companies ("SAP Group") for informational purposes only, without representation or warranty of any kind, and SAP Group shall not be liable for errors or omissions with respect to the materials. The only warranties for SAP Group products and services are those that are set forth in the express warranty statements accompanying such products and services, if any. Nothing herein should be construed as constituting an additional warranty. SAP and other SAP products and services mentioned herein as well as their respective logos are trademarks or registered trademarks of SAP AG in Germany and other countries. Please see http://www.sap.com/corporate-en/legal/copyright/index.epx#trademark for additional trademark information and notices.

2013-05-06

Contents

Chapter 1 Document history....9

Chapter 2 Getting started....11

2.1 About this documentation....11
2.2 Who should use this documentation?....11
2.3 What is BI launch pad....11
2.4 What's new in BI launch pad....12
2.5 Licensing....13
2.6 Key concepts....13
2.7 Key tasks....14

Chapter 3 BI launch pad basics....15

3.1 User interface....15
3.1.1 Tabs....15
3.1.2 Home tab....15
3.1.3 Documents tab....16
3.1.4 Header panel....21
3.2 To log on to BI launch pad....21

Chapter 4 Setting preferences....23

4.1 Setting preferences....23
4.1.1 To set general preferences....23
4.1.2 To change your password....24
4.1.3 Preferred viewing locales....25
4.1.4 To set Crystal report viewing preferences....25
4.1.5 To set BI workspaces preferences....26
4.1.6 To set Analysis edition for OLAP preferences....27
4.1.7 Web Intelligence preferences....27

Chapter 5 Viewing objects....33

5.1 Viewing objects....33

5.1.1 To view an object....33
5.1.2 To refresh an object....34
5.1.3 To view an older instance....34
5.1.4 To pin a tab for future viewing....34
5.1.5 To open a report in a larger viewing area....35
5.2 Viewing Crystal reports....35
5.2.1 Crystal report viewers....35
5.2.2 SAP Crystal Reports viewer 2011....40
5.2.3 To drill down on Crystal report data....42
5.2.4 To view alerts in Crystal reports....42
5.2.5 To view and edit parameters of Crystal reports in the web viewer....42
5.2.6 To print Crystal reports....43
5.2.7 To export Crystal reports....44
5.2.8 To sort data interactively....45
5.3 Viewing Web Intelligence documents....46
5.3.1 Web Intelligence viewer toolbar....46
5.3.2 To display the navigation map....48
5.3.3 To display user prompts....48
5.3.4 To find text....49
5.3.5 To drill on document data....49

Chapter 6 Working with objects....51

6.1 Managing objects....51
6.2 Creating and adding new objects....51
6.3 To add a document from your computer to BI launch pad....52
6.4 To replace third-party source documents....52
6.5 Sorting and filtering objects....53
6.5.1 To sort or filter objects in the repository....53
6.5.2 To remove a filter....54
6.6 To set the object properties....54
6.7 To copy an object....54
6.8 To move an object....55
6.9 To create a shortcut to an object....55
6.10 To send an object or an instance to a destination....55
6.11 To create an OpenDocument link to an object....56
6.12 To delete an object....56
6.13 To create a hyperlink....57
6.14 How the search works....57
6.15 What the search looks for....59
6.16 Search techniques....61
6.17 To perform a search in BI launch pad....63

6.18 Folders and categories....64
6.18.1 To create a folder or category....65
6.18.2 To set the properties of a folder or category....65
6.18.3 Adding objects to a folder....66
6.18.4 To assign an object to a category....66

Chapter 7 Scheduling objects....67

7.1 Scheduling objects....67
7.2 To schedule an object....67
7.2.1 To label a scheduled instance....68
7.2.2 To select a recurrence pattern....68
7.2.3 To specify database logon information....71
7.2.4 To select an instance format....71
7.2.5 To select a destination....79
7.2.6 To apply a record selection formula....93
7.2.7 To select print settings for a Crystal report....94
7.2.8 To schedule an object with parameters (prompts)....95
7.2.9 To schedule an object with events....95
7.2.10 To select the scheduling server group for an object....96
7.2.11 To select a cache format for Web Intelligence documents....96
7.2.12 To select languages for Crystal report instances....97
7.3 Pausing or resuming an instance....97
7.3.1 To pause an instance....97
7.3.2 To resume a paused instance....98
7.4 Scheduling an object package....98
7.4.1 To schedule an object package....99
7.5 Working with instances....99
7.5.1 To view the latest instance of an object....99
7.5.2 Viewing historical instances....100

Chapter 8 Working with collaboration....103

8.1 Collaboration column....103
8.1.1 Icons in the Collaboration column....104
8.1.2 To show the Collaboration column....104
8.1.3 To hide the Collaboration column....105
8.2 Feed panel....105
8.2.1 Collaboration drawer features....105
8.2.2 To open the feed panel....106
8.2.3 To resize the feed panel....106
8.3 To display an SAP StreamWork custom home page....107

8.4 Access rights required for collaboration....107
8.5 Document feeds....108
8.5.1 To refresh a feed....108
8.5.2 To view collaboration comments for an instance on a new tab....108
8.5.3 To view collaboration comments via an OpenDocument link....109
8.5.4 To follow a feed....110
8.5.5 To post a comment to a feed....110
8.5.6 To stop following a feed....111
8.6 To schedule content to SAP StreamWork....111
8.7 To send content to SAP StreamWork....112

Chapter 9 Publishing....115

9.1 About publishing....115
9.2 What is a publication?....115
9.3 Publishing concepts....115
9.3.1 Report bursting....116
9.3.2 Delivery rules....117
9.3.3 Dynamic recipients....119
9.3.4 Publication delivery destinations....120
9.3.5 Personalized placeholders for publication source document names....127
9.3.6 Personalized placeholders for email fields....127
9.3.7 Formats....128
9.3.8 Personalization....131
9.3.9 Publication extensions....132
9.3.10 Subscriptions....132
9.3.11 PDF-file merging for Crystal reports....133
9.4 Access rights required for publishing....133
9.4.1 Publishers and recipients: Who has rights to view what?....137

Chapter 10 Working with publications....139

10.1 Designing publications....139
10.1.1 Designing publications for Live Office....139
10.1.2 Designing publications for SAP recipients....139
10.1.3 To create a new publication in the CMC....140
10.1.4 To create a new publication in BI launch pad....140
10.1.5 To open a publication....141
10.1.6 To define general properties for a publication....141
10.1.7 To select source documents....141
10.1.8 To select Enterprise recipients....142
10.1.9 To select dynamic recipients....143

10.1.10 To select a destination for a publication....144
10.1.11 To select a recurrence pattern....146
10.1.12 To select personalized placeholders for publication source documents....148
10.1.13 To embed content from a dynamic source document in an email....149
10.1.14 Crystal report design tasks....150
10.1.15 Web Intelligence document design tasks....164
10.1.16 Optional publication features....167
10.2 Post-design publication tasks....171
10.2.1 Finalizing a publication....171
10.2.2 To test a publication....171
10.2.3 To subscribe to or unsubscribe from a publication....172
10.2.4 To schedule a publication to run....172
10.2.5 Viewing publication results....173
10.2.6 To redistribute a publication instance....176
10.2.7 To retry a failed publication....176
10.3 Improving publication performance....177
10.3.1 Recommendations for adding source documents....179
10.3.2 Recommendations for using dynamic recipient sources....180
10.3.3 Recommendations for sending and receiving email publication instances....181

Chapter 11 Working with alerting....183

11.1 Alerting....183
11.1.1 Alert sources....184
11.1.2 Differences between alerting and Crystal report alert notifications....184
11.1.3 Alerting workflow....185
11.1.4 Access rights required for alerting....186
11.1.5 Locating alert source objects in BI launch pad....188
11.1.6 Viewing alert notifications....189
11.2 Alerting tasks....189
11.2.1 To subscribe to an alert....190
11.2.2 To unsubscribe from an alert....190
11.2.3 To subscribe other users to an alert....190
11.2.4 To exclude users from an alert....191
11.2.5 To manage custom alerting settings for an alert source....192

Chapter 12 Working with applications....193

12.1 Working with applications in BI launch pad....193
12.2 To start an application in BI launch pad....193
12.3 BEx web applications in BI launch pad....193
12.3.1 To access BEx web applications in BI launch pad....194

12.3.2 To save BEx web applications as bookmarks....194

Chapter 13 Using discussions....197

13.1 Working with discussions....197
13.1.1 To open the Discussions drawer....197
13.1.2 To add a note....197
13.1.3 To edit a note....198
13.1.4 To reply to a note....198
13.1.5 To delete a note....198

Appendix A More Information....201

Index 203

Document history

The following table provides an overview of the most important document changes.

Version	Date	Description
SAP BusinessObjects Business Intelligence Platform 4.1	May, 2013	Support for SAP Jam was added. When integrated, SAP Jam adds social media and collaboration features to BI launch pad. Additional collaboration access rights were added for users and groups. The collaboration feed panel includes a drop-down list of instances and times and a button for following or unfollowing a feed. Automatically follow all related instances when you follow a template document in SAP Jam or SAP StreamWork. Comments on instances are posted only for the instance. You can open OpenDocument links to documents and instances on a tab or via the link. When viewing a document or instance via an OpenDocument link, open the SAP StreamWork feed panel to monitor or reply to a document feed. An **Add File Extension** check box was added to the "Destinations" dialog box.

Getting started

2.1 About this documentation

This documentation provides information and procedures for using SAP BusinessObjects Business Intelligence (BI) platform and BI launch pad.

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

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

2.2 Who should use this documentation?

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

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

2.3 What is BI launch pad

SAP BusinessObjects Business Intelligence (BI) platform includes BI launch pad, a web application that acts as a window to business information about your company. You can use BI launch pad to perform the following tasks:

- Access and organize Crystal reports, Web Intelligence documents, and other objects

- View information in a web browser, export it to other business applications (such as Microsoft Excel or SAP Jam), and save it to a specified location
- Use analytic tools to explore business information in detail

Features of BI launch pad vary by content type, and the applications available in BI launch pad depend on your access rights. For information about the features of your BI platform deployment, contact your system administrator.

2.4 What's new in BI launch pad

SAP Jam

SAP Jam was added as a collaboration option in Business Intelligence (BI) launch pad. When integrated, SAP Jam adds social media and collaboration features to BI launch pad.

Collaboration improvements

With the addition of SAP Jam, BI launch pad supports two collaboration options. Your administrator must configure your collaboration application in the Central Management Console (CMC) before you can use it.

The following enhancements are supported by both collaboration applications:

- New viewer options
- Improved integration with BI launch pad
- New access rights
- Add comments to a feed when opening a document or instance via an OpenDocument link

Open the details panel in any viewer

You can open the details panel from anywhere in BI launch pad—and in a viewer when using an OpenDocument link.

Automatically add file extensions when scheduling

When selected, the **Add File Extension** check box in the "Destinations" dialog box automatically adds the file extension to a file name when scheduling reports and publications. The check box is selected by default.

You can also add a file-extension placeholder when scheduling to the following destination locations:

- BI Inbox
- Email
- FTP server
- File system

Caution:
If you do not add a file extension to a file name, you may be unable to open the document.

2.5 Licensing

BI platform supports the following types of user licenses:

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

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

2.6 Key concepts

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

Objects

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

Categories

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

Scheduling

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

Events

An event is an object that represents an occurrence in the BI platform system. Events can be used for the following purposes:

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

Calendars

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

Instances

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

Publishing

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

Profiles

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

Alerting

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

2.7 Key tasks

This section describes the following key tasks in BI launch pad:

- Viewing objects in BI launch pad
- Adding objects to BI launch pad
- Changing and managing the objects you add
- Distributing content to users
- Collaborating on content with SAP Jam or SAP StreamWork
- Setting personal preferences

Related Topics

- Viewing objects
- Managing objects
- Scheduling objects

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

- About publishing
- Alerting
- Working with collaboration

  Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

- Setting preferences

BI launch pad basics

3.1 User interface

3.1.1 Tabs

BI launch pad tabs enable the display of multiple pages and documents in one window. When you open an object or an application, it appears on a tab.

Note:
If your document viewing preferences are set to open objects in windows (instead of on tabs), objects and applications open in a window.

BI launch pad has two default tabs—**Home** and **Documents**. Your system administrator can configure additional, custom home tabs as needed (for example, for SAP Jam).

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

3.1.2 Home tab

You use the **Home** tab to manage documents and BI launch pad features. The default **Home** tab includes the following areas:

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

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

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

- **Unread Alerts** shows the last 10 unread alert notifications.

  To view all alert notifications, click **See More** in the lower-right corner of the module.

- **My Applications** provides quick access to the applications in BI launch pad.

Custom home tabs

System administrators can create custom home tabs for users and groups that include objects such as a customized dashboard, a frequently used Crystal report, a web site, or the SAP Jam module. If you have the appropriate access rights, you can select a custom home tab in your BI launch pad preferences.

SAP Jam or SAP StreamWork custom home tab

If you have the appropriate access rights, you can select a SAP Jam or SAP StreamWork custom home tab in your BI launch pad general preferences.

Related Topics

- Setting preferences
- To display an SAP StreamWork custom home page

  You can monitor updates to the feeds you follow on an SAP StreamWork custom home page in BI launch pad.

3.1.3 Documents tab

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

3.1.3.1 Toolbar

You use the toolbar buttons to view and to manage objects.

Option	Description
View menu	Use to view objects, the latest instance of an object, and object properties.
New menu	Use to upload documents and create the following types of new objects: • Local documents • Publications • Hyperlinks • Folders • Categories
Organize menu	Use to manage object shortcuts, to cut, copy, paste, and delete objects (for example, messages), and to replace static documents (for example, Microsoft Word, Adobe PDF, and Microsoft Excel files) with a new version of the document.
Send menu	Use to send a document or instance to a destination. The available destinations depend on your BI launch pad configuration.
More Actions menu	Use to perform the following tasks: • Schedule objects • View the history of an object • Add objects to categories • View categories that objects belong to • Create OpenDocument links to objects • Follow documents (if collaboration is enabled in the CMC) The available actions vary, depending on the object type and on your access rights.
Details button	Use to show or hide the details panel for a document. **Tip:** Alternately, you can click **<** on the left edge of the details panel to expand it. The button changes to **>** when the panel is expanded. Click **>** to minimize the details panel. **Note:** If BI launch pad is integrated with SAP Jam or with SAP StreamWork, the panel is called the feed panel.

Related Topics

- Details panel

  The details panel contains drawers that display summary information about an object. You click a drawer to access the information in the drawer.

- Feed panel

  The **Collaboration** drawer provides access to the feed panel, where you can see and post comments about documents for which you have view or comment access rights.

3.1.3.2 Navigation panel

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

Related Topics

- Drawers

  Drawers are expandable panes on the navigation panel and on the details panel.

3.1.3.3 Drawers

Drawers are expandable panes on the navigation panel and on the details panel.

You click a drawer to expand or to minimize it. Depending on your access rights, you may be unable to view some objects in drawers.

The following drawers are available on the navigation panel:

- **My Documents** contains the user's `My Favorites` folder, BI Inbox, `My Alerts` folder, `Subscribed Alerts` folder, and personal categories.
- **Folders** displays a folder view of the repository.
- **Categories** displays a category view of the repository.
- **Search** displays search options and results.

The following drawers are available on the details panel:

- **Summary** displays information about the selected object (owner, description, document type, number of instances, and when the last instance ran).
- **Collaboration**, if BI launch pad is configured for collaboration with SAP Jam or SAP StreamWork
- **Discussions**, if discussions are enabled for BI launch pad

Related Topics

- Navigation panel
- Details panel

  The details panel contains drawers that display summary information about an object. You click a drawer to access the information in the drawer.

- Working with collaboration

  Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

- Working with discussions

3.1.3.4 List panel

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

3.1.3.5 Details panel

The details panel contains drawers that display summary information about an object. You click a drawer to access the information in the drawer.

The **Summary** drawer on the details panel displays the following information about an object:

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

If SAP Jam or SAP StreamWork is integrated with BI launch pad, the panel is called the feed panel and includes a **Collaboration** drawer. Click the drawer to view feeds for a document.

If discussions are enabled for BI launch pad and view rights are assigned to objects and associated notes, the **Discussions** drawer is available on the details panel. Click the **Discussions** drawer to show posted comments about a document.

Note:
By default, discussions are disabled. To enable discussions, contact your system administrator.

Related Topics

- Working with collaboration

  Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

- Working with discussions

3.1.3.5.1 To open the details panel

You can open the details panel from anywhere in BI launch pad or when viewing a document via an OpenDocument link.

Note:
If collaboration with SAP Jam or SAP StreamWork is enabled in the CMC, the details panel is called the feed panel.

- Click **<** on the left edge of the details panel.

  Note:
  You can also click **Details** on the toolbar in BI launch pad.

  The details panel appears, with the **Summary** drawer open. You can click a document or instance to display its summary information.

  If SAP Jam or SAP StreamWork is integrated with BI launch pad, a **Collaboration** drawer appears instead.

  If discussions are enabled, a **Discussions** drawer appears instead.

Related Topics

- Working with collaboration

  Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

- Working with discussions

3.1.3.5.2 To resize the details panel

You can resize the details panel from anywhere in BI launch pad.

Note:
When BI launch pad is configured for SAP Jam or for SAP StreamWork, this panel is called the feed panel.

- To resize the details panel, click the left edge of the panel, and drag it to the width you want.

Related Topics

- Feed panel

The **Collaboration** drawer provides access to the feed panel, where you can see and post comments about documents for which you have view or comment access rights.

3.1.3.5.3 To close the details panel

You can close the details panel from anywhere in BI launch pad or when viewing a document via an OpenDocument link.

- Click **>** on the left edge of the details panel.

  Note:
  You can also click **Details** on the toolbar in BI launch pad.

3.1.4 Header panel

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

- **Applications**, which provides access to plug-in applications for BI launch pad (such as BI workspaces). The applications available depend on your access rights.
- **Preferences**, which you use to configure how information appears in BI launch pad
- **Help Menu**, which provides access to the BI Launch Pad Help and the "About" dialog box that contains product information

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

Related Topics

- Documents tab

3.2 To log on to BI launch pad

Before you can log on to BI launch pad, you must have Microsoft Internet Explorer, Firefox, or Safari (for Macintosh users) installed on your computer.

1. In a web browser, type the URL for BI launch pad: http://*<WebServer>*:*<PortNumber>*/BOE/BI/

   Replace *<WebServer>* with the name of the web server and *<PortNumber>* with the port number for BI platform.

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

Tip:
If you have BI platform client tools installed on Windows, click **Start** > **Programs** > **SAP Business Intelligence** > **SAP BusinessObjects BI platform 4** > **SAP BusinessObjects BI platform Java BI Launch Pad**.

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

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

   By default, you are not asked to choose an authentication type. However, some Enterprise systems may require it.
4. If prompted, in the **Authentication** list, select an authentication type.

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

   BI launch opens with the default **Home** tab displayed.

Related Topics

- Setting preferences

Setting preferences

4.1 Setting preferences

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

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

4.1.1 To set general preferences

BI launch pad general preferences determine what appears in the default view of the software.

Your system administrator configures the initial (default) preferences at installation. You can keep the default settings or set your own preferences.

Note:
If the administrator updates your user group, the preferences you set will revert to the default setting.

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

   The "Preferences" dialog box appears, showing general preference options.
2. In the "Preferences" dialog box, click **General**.
3. Clear the **Use Default Settings (Administrator defined)** check box.

   The options are editable and contain default values, until you change them.

   Tip:
   To return the BI launch pad view to the default preferences set by your administrator (including any updates implemented after you customized the view), select **Use Default Settings (Administrator defined)**. The options on the "Preferences" dialog box update to show the inherited values, and the values become read only.
4. Choose the view that appears when BI launch pad starts:
   a. To display the **Home** tab, select **Home tab**, and choose one of the following options:

- To choose the default view that your administrator configured, select **Default Home tab**. If your administrator did not configure a default BI launch pad view, the BI platform **Home** tab is used.
- To choose a custom view, select **Select Home tab**, click **Browse Home tab**, choose a tab in the "Select a Custom Home tab" dialog box, and click **Open**.

  If a BI workspaces view was created for SAP Jam or SAP StreamWork, it is listed in the "Select a Custom Home tab" dialog box.

b. To display the **Documents** tab, select **Documents tab**, and select the drawer and folder to open by default.

   You can select the **My Documents**, **Folders**, or **Categories** drawer. For example, if you want the **My Documents** drawer to open to your BI Inbox when you log on, select **My Documents** and **My Inbox**.

5. Under **Choose columns displayed in Documents tab**, select which column headings to display in the summary information, for each object.

   For example, to display a column for SAP Jam or SAP StreamWork collaboration, select the **Collaboration / Discussion Status** check box.
6. Under **Set document viewing location**, choose whether to open documents on a new tab or a new browser window.
7. In the **Set the maximum number of items per page** box, type the maximum number of objects to display per page when you view a list of objects.
8. Click **Save & Close**.

Related Topics

- To log on to BI launch pad

4.1.2 To change your password

Depending on your access rights, you may be unable to perform this task. If you cannot change your password, contact your system administrator.

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

4.1.3 Preferred viewing locales

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

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

   BI platform may use a default fallback locale, but it is typically a variation of the user's PVL. For example, if the PVL is French (Canada) and the object does not have a translated name and description in Canadian French, BI platform will use French (France).
2. If no PVL is set, BI platform displays the name and description in the same language as the product locale.
3. If option 1 or 2 is not feasible, BI platform displays the name and description in the object's source language.

4.1.3.1 To set locale and time zone preferences

Before scheduling objects to run, check the time zone selected for BI launch pad. The default time zone is local to the web server that is running BI platform, not to the Central Management Server (CMS) computer to which you connect. Properly setting the time zone ensures that scheduled objects are processed in the time zone in which you are working.

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Locales and Time Zone**.
3. In the **Product Locale** list, select the language that you want BI launch pad to use.
4. In the **Preferred Viewing Locale** list, select a locale that uses the formatting conventions for dates, numbers, and time that you want to use when viewing objects.

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

4.1.4 To set Crystal report viewing preferences

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

2. In the "Preferences" dialog box, click **Crystal Reports** in the navigation list.
3. Under **Select a default view format**, select a viewer for displaying Crystal reports:
   - **Web (no downloading required)**

     This viewer does not download files and will work without Java or ActiveX. You must use this viewer to view reports created in Crystal Reports.
   - **Web ActiveX (ActiveX required)**

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

     Use this viewer for web browsers that support the Java Virtual Machine.
4. If you selected the **Web (no downloading required)** viewer, under **Select printing control (for Web)**, perform one of the following actions:
   - Click **PDF one-click printing (Adobe Acrobat required)** to export reports to PDF so that you can print PDF files. If a report has Flash objects that you want to print, you must print to a PDF file.
   - Click **ActiveX one-click printing (ActiveX required)** to print reports from the viewer. You must install a small ActiveX component.
5. If you selected the **Web (no downloading required)** viewer, under **Select a rendering resolution (for Web)**, choose a viewing resolution.
6. Under **Select a default measuring unit**, select **Inches** or **Millimeters**.
7. Select the **Show SAP Variable Technical Name (SAP Crystal Reports 2011 only)** check box if you want to see the technical names of SAP variables when you work with reports in SAP Crystal Reports 2011 format.
8. Click **Save & Close**.

4.1.5 To set BI workspaces preferences

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **BI workspaces**.
3. Under **BI workspaces**, in the **Default style style sheet to use when creating a new workspace** list, select a page format to apply to new BI workspaces.
4. Under **Backgrounds for style sheets**, select a style sheet for new BI workspaces in the **Select a style sheet** list.
5. To select a background image, select the **Image** check box, click **Change Image**, and locate and select the image.

   Image files must be smaller than 2 MB. Image formats can be JPG, GIF, or PNG.
6. To select a background color, select the **Color** check box, and enter the color information.

7. Repeat steps 3 to 6 for each style sheet that you will use to create new BI workspaces.
8. Click **Save & Close**.

Before you can edit a BI workspace, you must open the workspace as a tab in BI launch pad.

4.1.6 To set Analysis edition for OLAP preferences

1. Log on to BI launch pad.
2. On the header panel, click **Preferences**.
3. In the "Preferences" dialog box, click **Analysis edition for OLAP** in the navigation list.
4. Select the **Accessibility Mode** check box to use a screen reader with Analysis edition for OLAP.
5. Click **Save & Close**.

   The "Preferences Changed" dialog box appears, indicating that some changes will take place after the page reloads.
6. Click **OK**.

The next time you use Analysis edition for OLAP, it will use a screen reader.

4.1.7 Web Intelligence preferences

4.1.7.1 To select a reading interface for Web Intelligence documents

All reading interfaces, except PDF, have view and design modes. Use the view mode to perform basic viewing tasks and the design mode to modify a document. The only difference between reading interfaces is that two of them require you to download components.

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **View**, choose a reading interface for viewing Web Intelligence documents:
   - Select **HTML (no download required)** to view documents over the Internet, without downloading components..
   - Select **Applet (download required)** to download a Java applet that you use to view documents.
   - When you plan to work offline occasionally, select **Desktop (Rich Client, Windows only, installation required) (installation required)** to download a desktop application that you use to view documents.
   - Select **PDF** to view documents in PDF.

4. Click **Save & Close**.

4.1.7.2 To select a modification interface for Web Intelligence documents

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

All modification interfaces have similar features and capabilities. The only difference between the interfaces is that two of them require you to download components.

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **Modify (creating, editing and analyzing documents)**, select a modification interface:
   - Select **HTML (no download required)** to create and modify documents online, without downloading anything.
   - Select **Applet (download required)** to download a Java applet required for viewing documents.
   - Select **Desktop (Rich Client, Windows only, installation required) (installation required)** to download a desktop application for viewing documents.

     Tip:
     Select this option if you plan to work offline occasionally.
4. Click **Save & Close**.

4.1.7.3 To select a default universe

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

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **Select a default Universe**, click **Browse**, and select a universe.
4. Click **OK**, and click **Save & Close**.

4.1.7.4 To select a formatting locale for Web Intelligence documents

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

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

2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **When viewing a document**, choose a locale:
   - Select **Use the document locale to format the data** to maintain the locale used when a document was created.
   - Select **Use my preferred viewing locale to format the data** to use your PVL.
4. Click **Save & Close**.

4.1.7.5 Drill options for data

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

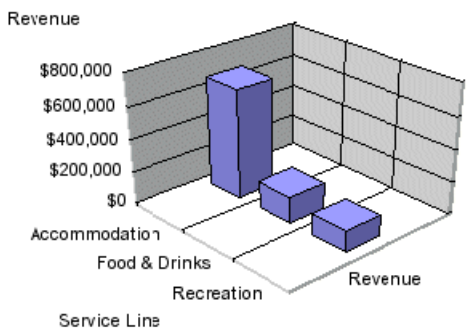
When you start drill mode, the drill toolbar automatically appears at the top of a report and displays the value(s) on which you drilled. The values filter the results that appear on the drilled report.

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

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

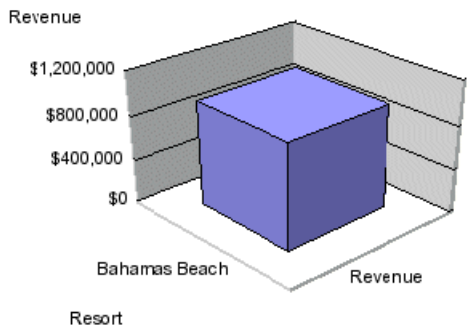
The following examples show how each option affects a report when you drill down on a table to analyze detailed results per service line. In the first example, **Synchronize drill on report blocks** is selected and both the table and the chart display the drilled values:

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



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

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



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

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

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

4.1.7.5.1 To set the drill options

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **View**, select either the **HTML (no download required)** or **Desktop (Rich Internet, Windows only, installation required) (installation required)** reading interface.
4. Under **Drill options**, choose general options to apply to drill sessions:
   a. To be prompted when a drill action requires a new query to add data to a document, select **Prompt when drill requires additional data**.

      When prompted, you may be able to apply filters to the extra dimensions in the new query. The filters restrict the size of a query to the data necessary for your analysis.
   b. To synchronize drilling on all report blocks, select **Synchronize drill on report blocks**.
   c. To hide the "drill" toolbar when you switch to drill mode, select **Hide Drill toolbar on startup**.

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

      A duplicate of the original report is created. When you quit drill mode, both the original report and the drilled report remain in the document for viewing.

b. To drill on the current report so that it is modified by your drill actions, select **On existing report**. When you end drill mode, the report displays the drilled values.

6. Click **Save & Close**.

4.1.7.6 To select an Excel format

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

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **Web Intelligence**.
3. Under **Select a priority for saving to MS Excel**, select an option:
   - To display data in a format that is similar to Web Intelligence, click **Prioritize the formatting of the documents**.
   - To display data in a text format, click **Prioritize easy data processing in Excel**.
4. Click **Save & Close**.

Viewing objects

5.1 Viewing objects

The **Documents** tab is where you open objects that you want to view or edit. When you double-click an object, it opens on a new tab. From there, you can open it in a window if necessary.

When you view a Crystal report or a Web Intelligence document, your access rights and the default settings configured by your administrator determine which data you see. You can view report data from the source, in the latest instance of an object, or in a report's saved data. Depending on your access rights, you may be able to refresh a report or a document with new data from its source.

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

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

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

5.1.1 To view an object

- On the **Documents** tab, locate the object you want to view, and double-click the object.

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

5.1.2 To refresh an object

Before you can refresh data in an object, you must have refresh rights for the object, and the server must contain the data source information.

Refreshing an object enables you to view data on demand. However, refreshing may use a considerable amount of system resources.

Tip:
As a rule, refresh objects only when it is likely that data has changed.

- Click on the toolbar in the object viewer.

5.1.3 To view an older instance

1. Right-click the object for which you want to view an instance and select **History**.
2. In the "History" dialog box, double-click the instance that you want to view.

The instance you selected opens on a new tab.

5.1.4 To pin a tab for future viewing

Before you can pin a tab, your BI launch pad preferences must be configured to enable tabbed document viewing.

You can pin a document or instance that you frequently view to a tab in BI launch pad. The document or instance automatically opens on a tab the next time you log on to BI launch pad.

Note:
To unpin a tab, click in the upper-right corner of the tab. When not pinned, the icon on the button points sideways.

1. Perform one of the following actions:
   - To open an object, right-click an object or instance and select **View**.
   - To open the latest instance of an object, right-click an object or instance and select **View Latest Instance**.

   Tip:
   To open an older instance, right-click the object and select **History**, and then select the instance in the "History" dialog box.

The object or instance opens on a new tab.

2. Click in the upper-right corner of the tab.

The icon on the button points down, indicating that the tab is pinned.

5.1.5 To open a report in a larger viewing area

To view more detail in reports, you can open them on a new tab or in a new window in BI launch pad. For example, if you need a larger viewing area for a report, open the report in a new window.

- Right-click a report and select **Open in a new window**.

5.2 Viewing Crystal reports

When you click a Crystal report, the report appears in a viewer. The type of viewer you have determines which tasks you can perform.

5.2.1 Crystal report viewers

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

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

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

Related Topics

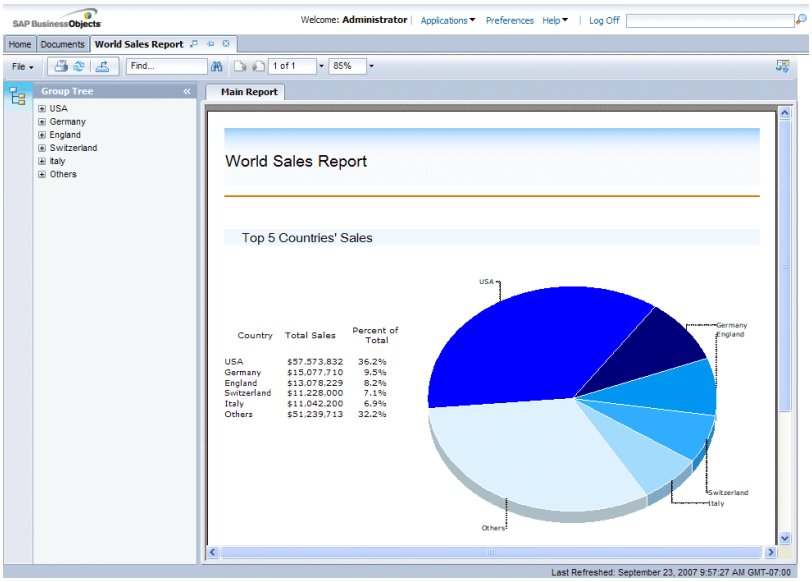
- To set Crystal report viewing preferences
- SAP Crystal Reports viewer 2011

5.2.1.1 Web viewer

Choose this viewer to view, refresh, and print reports, edit parameters, and export reports to a variety of formats. Select **File > Open** to open Crystal reports stored in the repository.

You can access the web viewer in a browser, without downloading a plug-in.

Note:
The web viewer is the only Crystal report viewer that can access the "parameter panel" and that displays SAP Crystal Reports for Enterprise reports.



Related Topics

- SAP Crystal Reports viewer 2011

5.2.1.1.1 Web viewer toolbar options

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

Option	Description
File menu	From this menu, you can select **Open**, **Send To**, **Create Shortcut In My Favorites**, **Schedule**, or **History**. Select **File > Open** to open a Crystal report from the repository. Other options function the same as BI launch pad **File** menu options.
and	Click to move back one page or to move forward one page in a report.
	Click to print a report.
	Click to refresh a report to the most current data from a report's data source.
	Click to export a Crystal report to your computer or to a location on a network.
1	• Click to go to the previous page or to go to the next page in a report. • Select **Go to First Page** and **Go to Last Page** in the list to go to the first or last page in a report.
100%	Select **400%**, **300%**, **200%**, **150%**, **125%**, **100%**, **75%**, **50%**, or **25%** in the list to view text in a report by that percentage of zoom or reduction.
	Click to open the "group tree."

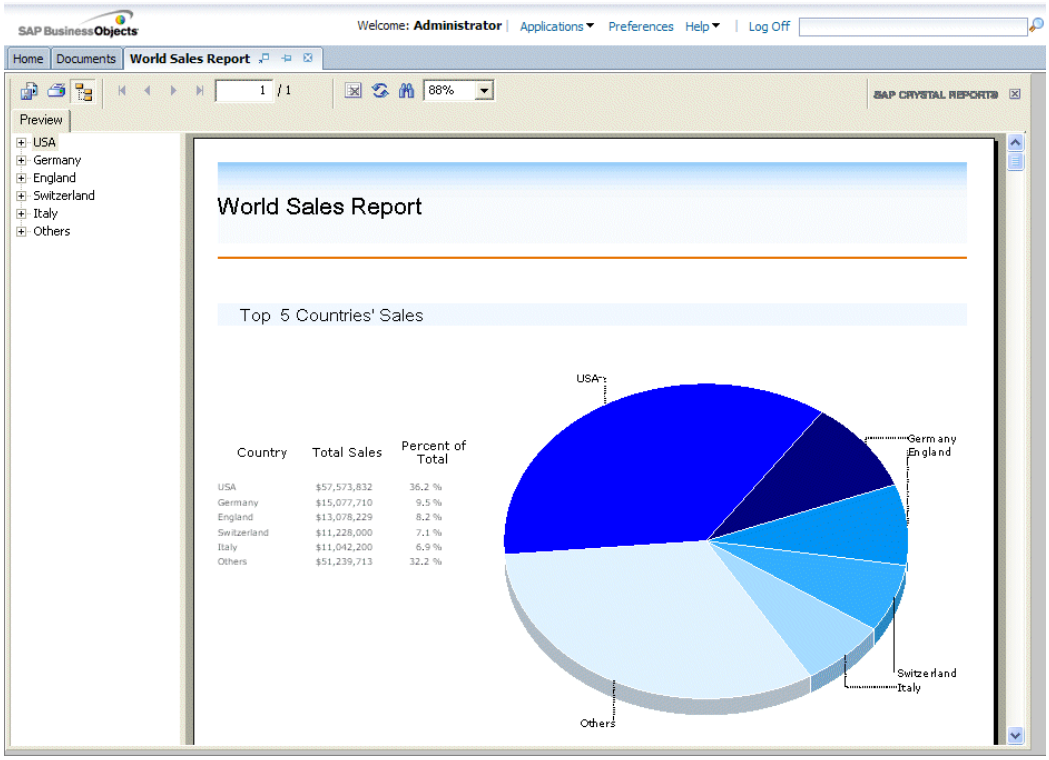
5.2.1.1.2 To open the group tree

- Click on the left side of the web viewer.

5.2.1.2 Web ActiveX viewer

Choose this viewer to view, refresh, and print reports and to export reports to various formats.

The web ActiveX viewer can be used with Microsoft Internet Explorer versions that support ActiveX controls. You must download and install the ActiveX component. If ActiveX is not installed, you cannot use the web ActiveX viewer. For assistance, download ActiveX or contact your system administrator.



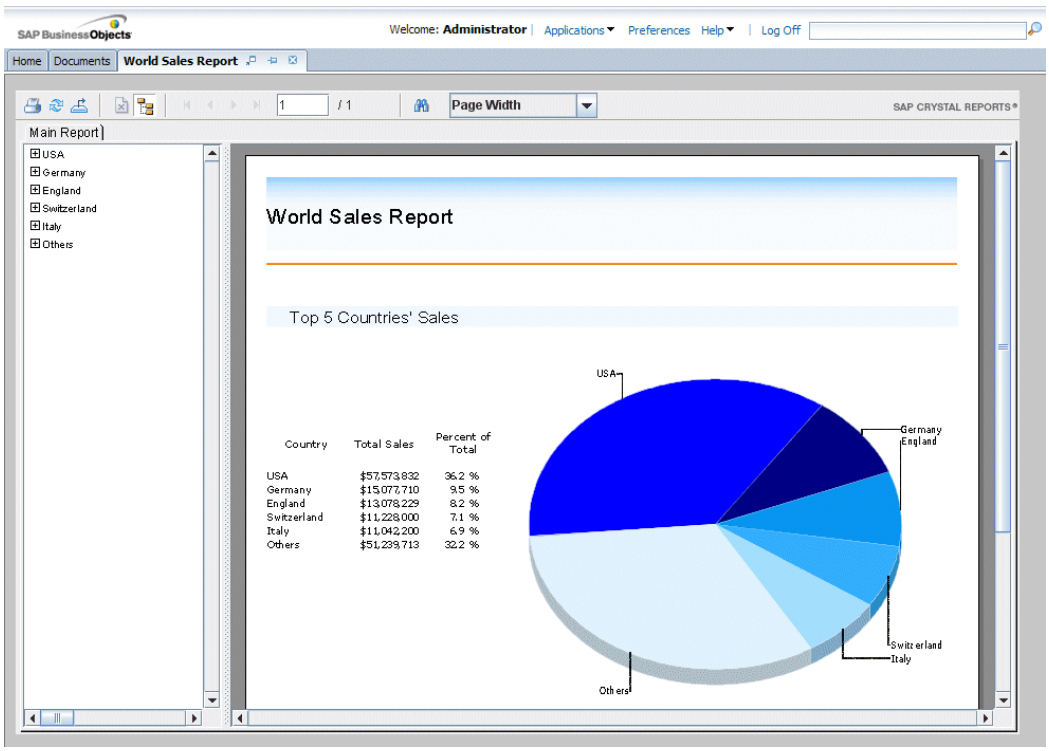
Tip:
After drilling down on data in a report, you can use the report tabs to navigate the report.

Related Topics

- Viewing Crystal reports

5.2.1.3 Web Java viewer

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



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

Related Topics

- Viewing Crystal reports

5.2.1.3.1 Web Java viewer toolbar options

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

Option	Description
	Click to print a report.
	Click to refresh a report to the most current data from the report's data source.
	Click to export a Crystal report to your computer or to a location on a network.
	Click to stop report processing.
	Click to show or hide the "group tree", which you use to navigate through data in a report.
	Click a button to go to a page in a report: • Click to go to the first page. • Click to go to the previous page. • Click to go to the next page. • Click to go to the last page.
1 / 1	Shows a report's page range. Type the page number you want to go to in the text box.
	Click to search for text in a report.
100%	Select **400%**, **300%**, **200%**, **150%**, **100%**, **75%**, **50%**, or **25%** in the list to view text in a report by that percentage of zoom or reduction.

5.2.2 SAP Crystal Reports viewer 2011

SAP Crystal Reports viewer 2011 is installed on your computer so you can view downloaded Crystal reports without connecting to BI platform. Use SAP Crystal Reports viewer 2011 to perform the following tasks:

- Print or export reports
- Save reports
- Select data to view
- Drill down on data in reports
- View multiple reports

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

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

5.2.2.1 To install SAP Crystal Reports viewer 2011

When you install the Crystal Reports viewer 2011, it resides as a client-software viewer on your computer.

Note:
This task applies only to the English-language version of the www.sap.com web site.

1. In a browser, go to http://www.sap.com/solutions.
2. In the **Search** box on the web page, search for “Crystal Reports Viewer”.
   The search results appear.
3. Click the first result called *SAP Crystal Reports Viewer*.
   The SAP Crystal Reports viewer web page appears, with a **Download Now** link on the right side of the page.
4. Download and run the SAP Crystal Reports Viewer 2011 installation program.
5. Follow the onscreen instructions, accepting the default values when possible.
6. Click **Finish**.

5.2.2.2 Opening SAP Crystal Reports viewer 2011

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

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

5.2.3 To drill down on Crystal report data

You can drill down a report to see the data under charts and summarized groups.

- In a Crystal reports viewer, double-click a link in a report.

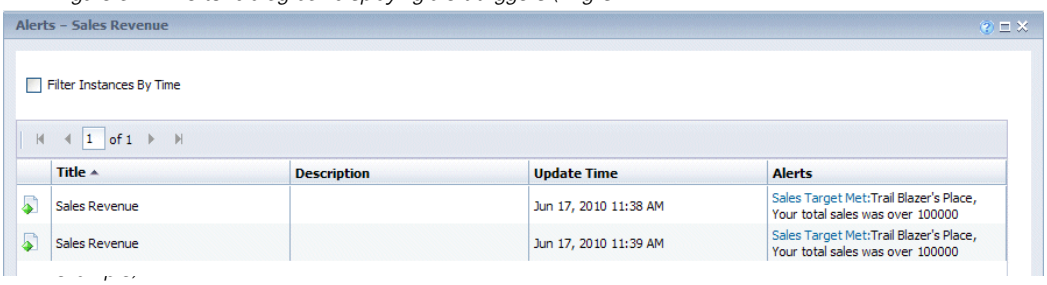
5.2.4 To view alerts in Crystal reports

BI platform tracks report instances that trigger alerts. You can view the alerts for reports created in SAP Crystal Reports.

1. In the CMC, select the **Folders** area.
2. Locate the folder or category that contains the Crystal report you want to view, and select the object.
3. Select **More Actions** > **Alerts**.

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

   Figure 5-1: "Alerts" *dialog box displaying alert triggers (English*



4. Double-click a title to open the report instance.

5.2.5 To view and edit parameters of Crystal reports in the web viewer

1. Locate and select the Crystal report that you want to view.
2. Select **View** > **View**.
3. If prompted to enter report values, enter the values.

   You must enter report values before you can view the report.
4. Select the data you want to view, and click **OK**.
5. To identify which parameters you can access in the report, click .

The parameter panel displays the report parameters.

6. Select a parameter.
7. To edit the parameter value, perform either of the following actions:
   - On the "parameter" panel, type a new value.
   - Click **>** to open an editing dialog box, type a new value, and click **OK**.
8. Edit the remaining parameters as needed.
9. To view the report with the new parameter values, click **Apply**.

5.2.6 To print Crystal reports

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

Note:

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

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

   The "Print" dialog box appears.
3. Under **Print range**, select **All** or type the page range to print.
4. Under **Copies**, type the number of copies to print.

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

5.2.7 To export Crystal reports

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

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

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

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

5.2.7.1 Export format options

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

You can export reports to the following file formats:

File format	Description
Crystal Reports	You cannot export to this `.rpt` format from a drilled-down view.
Crystal Reports (RPTR)	This read-only `.rptr` format attempts to preserve the appearance of the original report.
Microsoft Excel (97-2003)	`.xls` format
Microsoft Excel (97-2003) (Data Only)	Data-only `.xls` format
Microsoft Word (97-2003)	`.doc` format

File format	Description
PDF	`.pdf` format
Rich Text Format (RTF)	This `.rtf` format is only available from a web viewer.
Microsoft Word - Editable (RTF)	This `.doc` format preserves less formatting than the **Microsoft Word (97-2003)** format. Text appears in lines, and images are placed inline with text.
Separated Values (CSV)	`.csv` format
XML	`.xml` format

Note:
Flash objects only appear if you export to a Crystal report format (`.rpt` or `.rptr`) or to Adobe PDF (`.pdf`). Fallback images appear when exporting to all other formats.

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

Related Topics

- Crystal report instance formatting options

5.2.8 To sort data interactively

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

5.3 Viewing Web Intelligence documents

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

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

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

5.3.1 Web Intelligence viewer toolbar

Toolbar option	Description
Web Intelligence menu	Use this menu to show or hide the following parts of the BI launch pad user interface. Select one of the following options: • **Filter Bar** • **Outline** • **Side Panel** menu options: **Normal**, **Minimized**, or **Off** • **Report Tabs** • **Status Bar**
	Click to create a new Web Intelligence document.
	Click to open a Web Intelligence document for viewing.
	Use this menu to save changes to a document to various file formats, with a new name, and locally on your computer. Select one of the following options: • **Save** • **Save As**
	Click to create a PDF version of a document for printing.
	Click to search for text in a document.

Toolbar option	Description
	Click to show the dates of document instances.
	Use this menu to export a document, the current report, or data to your computer in the format you choose. Select one of the following options: • **Export Document As** menu options: **PDF**, **Excel**, **Excel 2007**, or **Text** • **Export Current Report As** menu options: **PDF**, **Excel**, **Excel 2007**, or **Text** • **Export Data to CSV**
	Use this menu to send a document to a destination. The available destinations vary, depending on how BI launch pad is configured. Select one of the following options: • **Send to Mail** to send the document to an email address • **Send to User** to send the document to a particular user • **Send to Ftp** to send the document to an FTP server
	Click to undo the previous action.
	Click to redo the previous action.
	Use this menu to refresh content. Select one of the following options: • **Refresh Query** to refresh the current tab • **Refresh All** to refresh the entire document
Track menu	Use this menu to track changes in a document. Select one of the following options: • **Track** to track changes • **Show Changes** to show tracked changes • **Display Options** to set tracking options
Drill menu	Use this menu to drill up or down on document data. The options available depend on whether drilling is in progress. Select one of the following options: • **Start Drill Mode** to start drilling on data • **Stop Drill Mode** to stop drilling on data • **Snapshot** to capture a level of analysis revealed during data drilling. A copy of the report is created and opened on a new tab.
Filter Bar	Click to show or hide the **Report Filter** toolbar

Toolbar option	Description
Outline	Click to show or hide the document outline.
Reading menu	Use this menu to read a document in a different format. Select one of the following options: • **HTML** • **PDF**
Design menu	Use this menu to modify the design of a document. Select one of the following options: • **With Data** to modify the data in the document • **Structure only** to modify only the document's structure

5.3.2 To display the navigation map

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

1. Open the Web Intelligence document in which you want to locate reports.
2. On the viewer toolbar, select **Web Intelligence** > **Side Panel** > **Normal**.
3. On the side panel, click .

The "navigation map" appears in the side panel.

5.3.3 To display user prompts

For Web Intelligence documents, the information that prompts gather from users may determine which data appears in a document. Use the **user prompt input** icon ( ) to gather information from users.

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

1. Open the Web Intelligence document you want to view.
2. On the viewer toolbar, click **Web Intelligence** > **Side Panel** > **Normal**.
3. On the side panel, click .
   The **User Prompt Input** pane appears in the side panel.

5.3.4 To find text

1. Open the Web Intelligence document that you want to view.
2. On the viewer toolbar, click .

   The **Search Bar** panel appears under the document.
3. In the search box, type the text to locate.
4. Click the arrow in the icon, and select **Ignore case** or **Match case**.
5. Click beside the search box.
6. (Optional) Click **Find Previous** to search for the previous occurrence or **Find Next** to search for the next occurrence.

5.3.5 To drill on document data

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

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

Working with objects

6.1 Managing objects

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

Folders and categories can be either public (that is, corporate) or personal. BI launch pad users with appropriate access rights can view public folders and categories and add and edit objects in public folders and categories.

Personal categories and your `My Favorites` folders are for your use; you can create new folders and categories and arrange objects in them as needed. Personal categories and your `My Favorites` folders are private and cannot be viewed or altered by other BI launch pad users, but your administrator can edit them.

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

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

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

6.2 Creating and adding new objects

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

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

You must have the appropriate access rights before you can add objects to BI launch pad.

For example, a business analyst creates a report on how a recent merger affected sales and needs to share it with the rest of the company. The business analyst can add the report to BI platform so that everyone in the company with appropriate access rights can view it.

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

   The folder's contents appear.
2. Select **New** > **Local Document**.

   The "New Local Document in" dialog box appears.
3. Beside the **File Name** box, click **Browse** to locate the document to add, and select the document.

   The file name of the document appears in the **Title** box.
4. (Optional) Type a description and keywords for the document.
5. If the document is a Crystal report:
   a. To retain the report summary information, click **Use description from report**.
   b. To retain the report's saved data, click **Keep saved data**.
6. (Optional) In the **MIME** box, type the MIME type of the file.
7. (Optional) Under **Select one or more categories to add the object to**, choose a category to assign the document to.

   You can add a document to more than one category or to no category at all. Depending on your access rights, you may be unable to add the document to some categories.
8. Click **Add**.

6.4 To replace third-party source documents

Before you can replace a third-party source document, you must have Edit access rights for the document.

A third-party (also called "agnostic") source document does not originate in BI launch pad. For example, it may be a Microsoft Word, Adobe PDF, or Microsoft Excel file.

Although you cannot update the content of third-party documents, you can replace a third-party document with a more recent version of it. This enables you to view the latest source information in documents that originate outside of BI launch pad.

1. Right-click a third-party document and select **Organize** > **Replace File**.

Note:
If the **Replace File** menu option is unavailable for a third-party document, you do not have Edit rights for the document.

2. In the "Replace File" dialog box, click **Browse**, and select a more recent version of the source document file on your computer.

   Note:
   If a message appears, stating that the file does not match the source document's file format, you have chosen a file in a different format than the original source document. Click **OK** to close the message, and then click **Browse**, and select the correct source document.

3. Click **Replace**.
4. In the confirmation message, click **OK** to update the third-party document.

6.5 Sorting and filtering objects

By default, objects are sorted alphabetically by title, but you can sort or filter objects by other criteria.

To sort objects in ascending order by a particular column, click the column heading. Click the column heading again to sort the objects in descending order.

To filter objects by data you choose, point to the column heading on which to base the filter. A (**funnel** icon) appears in the column heading. Click to configure the filter options, which vary for each column.

6.5.1 To sort or filter objects in the repository

By default, when you view the contents of a folder or a category, BI launch pad displays all objects that you have access rights to view. To fine-tune the information you see, you can filter objects by one or more column headings.

1. On the **Documents** tab, point to the column heading on which you want to filter, and click in the heading.

   The filter options for that column appear.

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

- To filter by the object creator, in the **Created By** column, select **Everyone** or **Me**, and click **OK**.
- To filter by the time when the object was created, in the **Created On** column, select the start time and the end time, and click **OK**.

Only the filtered objects appear.

6.5.2 To remove a filter

- Click on the column heading on which your view is filtered, select the **Clear Filter** check box, and click **OK**.

  For example, if your view is filtered by object type, click on the **Type** column, select the **All Types** check box, and click **OK**.

6.6 To set the object properties

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

1. On the **Documents** tab, expand the **Folders** drawer, and select the object.
2. Right-click the object and select **View** > **Properties**.

   The "Properties" dialog box appears.
3. (Optional) Edit the folder's description and keywords for the object.
4. Click **Save & Close**.
5. (Optional) Right-click the object and select **Categories**.
6. In the "Categories" dialog box, choose one or more categories to assign the object to, and click **OK**.

6.7 To copy an object

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

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

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

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

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

6.8 To move an object

1. On the **Documents** tab, expand the **Folders** drawer, and select the object you want to move.
2. Select **Organize** > **Cut**.
   The object is copied to the clipboard. It is not deleted until you paste it.
3. Locate and select the folder where you want to put the object.
4. Select **Organize** > **Paste**.

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

6.9 To create a shortcut to an object

Tip:
You can create shortcuts to frequently viewed objects in your `My Favorites` folder. Right-click an object and select **Organize** > **Create Shortcut In My Favorites**.

1. On the **Documents** tab, expand the **Folders** drawer.
2. Right-click the object you want to create a shortcut to and select **Organize** > **Copy Shortcut**.
3. Right-click the folder where you want to put the shortcut and select **Organize** > **Paste Shortcut**.

6.10 To send an object or an instance to a destination

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

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

1. On the **Documents** tab, locate the object or the instance that you want to send.
2. Select the object or instance:
   - To send an object, right-click the object and select **Send**, click a destination location, and set the destination options.
   - To send an instance, select the object that contains the instance, right-click the object and select **History**, select one or more instances in the "History" dialog box, and click **Send**.

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

   You can send instances with a status of Success or Failed. Instances with a status of Recurring or Pending are scheduled but do not contain data.
3. Click **Send**.

Related Topics

- Destinations
- Destination options

6.11 To create an OpenDocument link to an object

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

1. On the **Documents** tab, right-click the document you want to send and select **Document Link**.

   The "Document Link" dialog box appears.
2. Select the entire OpenDocument link in the **Link** box, right-click and select **Copy**.
3. Click **OK**.
4. Position the cursor where you want to paste the link (for example, in the body of an email), right-click and select **Paste**.

   The link is pasted.

6.12 To delete an object

You must have appropriate access rights before you can delete objects.

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

6.13 To create a hyperlink

Tip:
To save time, create hyperlinks to frequently viewed documents in the `My Favorites` folder, on the **My Documents** drawer.

1. On the **Documents** tab, expand the **Folders** drawer.
2. Right-click the folder where you want to create a hyperlink and select **New** > **Hyperlink**.
   The "Hyperlink" dialog box appears.
3. Click **General Properties**.
4. Type a title, a description, and keywords for the hyperlink.
5. Click **URL**, and type the URL of the web page that you want to create a hyperlink to.
   For example, type http://www.sap.com
6. (Optional) Click **Categories**, and choose one or more categories to assign the hyperlink to.
7. Click **OK**.

6.14 How the search works

Search string recognition as you type

You can search for a user or group by typing part or all of a user name, full name, or email address. As you type, the search looks for results that match the words in your search.

For example, when scheduling to the **BI Inbox** destination, you can type a user's full name in the **Find title** box to quickly locate the user in the **Available Recipients** list.

Matches to search text are based on an object's keyword, title, description, owner information, and content. Search results appear in the **Search** drawer, and you can view them at any time.

Suggestions for alternate spelling

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

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

Suggested query

BI platform automatically suggests documents based on your search input. When running a search, if no result documents contain the information you wanted to find or if no results were found, BI platform suggests documents that may be able to answer your question.

BI platform selects documents to suggest by interpreting your search input and comparing it to the structure of universes and data in existing documents. For example, if you search for "Mexico sales 2006," the search may see that "sales" is a measure in a universe that houses sales data for your company; that the field "country" is equal to "Mexico" in another document; or that "2006" is a predefined filter—and use the information to filter data. BI platform then creates a document using data from the universe and filters it identified. You can then view and edit the new document.

Click the **Run Query** link to view and save the generated document. Clicking **Edit Query** opens the document for editing so you can further refine the query as needed.

Note:
Suggested new documents will be in the format of an Web Intelligence document only.

Matched word highlighting

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

Facets and search result grouping

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

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

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

Each facet is assigned objects that appear in search results. For example, the public category facet might include three objects: HR reports, legal documents, and sales reports. You can search for "2006 sales by employee" and then click the sales reports object in the search results to see only results for sales reports in the public category facet.

Facets are generated from metadata and document content. Content-based facets are based on fields or variables in documents. For example, if the "product" variable is used in many sale reports, the search creates a facet for it. You can refine the search by product name to see only results related to that product.

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

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

Search result ranking

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

Related Topics

- What the search looks for
- Search techniques

6.15 What the search looks for

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

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

Object type	Searchable content
• Agnostic object • Analysis view • BI workspaces • Dashboard and Xcelsius object • Discussion • Event • Flash object • Hyperlink • Lifecycle management console job • Metadata (from Information Designer) • Module • Object package • Profile • Program object • Publication • Query (from Query As a Web Service) • Universe • Widget • Workspace (created in SAP BusinessObjects Analysis edition for OLAP)	Metadata **Note:** An agnostic object is a non-BusinessObjects object that BI launch pad can access. The data in an agnostic object does not change, and the object cannot be scheduled.

6.16 Search techniques

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

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

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

6.17 To perform a search in BI launch pad

You can search any object in BI launch pad that is not excluded from searches.

1. On the **Documents** tab, type the search text in the **search** box.

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

2. Click on the toolbar.

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

   - **Location**
   - **Type**
   - **Refresh Time**
   - **Author**
   - **Data Source**

Facets appear based on the results content. If a search generated more than five facets, click **More** to view the remaining facets.

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

   When you double-click a Web Intelligence document or a Crystal report, a viewer opens and goes to the first match of the search text in the report.

   Note:

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

6.18 Folders and categories

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

BI platform supports two types of folders:

- `My Favorites` personal folder

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

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

- Public folders

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

BI platform supports two types of categories:

- Personal categories

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

- Corporate categories

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

6.18.1 To create a folder or category

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

6.18.2 To set the properties of a folder or category

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

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

   The "Properties" dialog box appears.
3. (Optional) Edit the folder name, description, and keywords.
4. Click **OK**.

6.18.3 Adding objects to a folder

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

6.18.4 To assign an object to a category

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

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

Scheduling objects

7.1 Scheduling objects

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

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

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

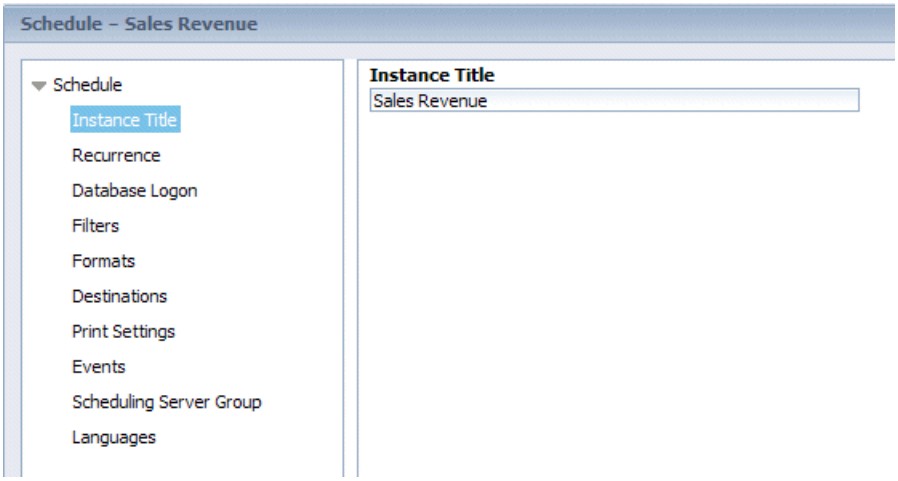
Related Topics

- Setting preferences

7.2 To schedule an object

For object options with a default setting, you can keep the default or change the setting when scheduling an object.

1. On the **Documents** tab, right-click the object to schedule and select **Schedule**.



2. In the "Schedule" dialog box, click a category in the navigation list, and then set options in that category for the object.

   Repeat this step for each category that you want to set scheduling options for.

3. Click **Schedule**.

   The "History" dialog box appears, displaying your scheduled job as an instance with a status of Running.

7.2.1 To label a scheduled instance

1. On the **Documents** tab, right-click the object whose scheduled instance you want to assign a name to and select **Schedule**.
2. In the "Schedule" dialog box, click **Instance Title**.
3. Type a name for the instance in the **Instance Title** box, and click **Schedule**.

7.2.2 To select a recurrence pattern

The recurrence pattern you choose determines when BI platform runs an object.

1. Right-click an object and select **Schedule**.

   The "Schedule" dialog box appears.

2. Click **Recurrence**.
3. In the **Run object** list, select a recurrence pattern.
4. Click **Schedule**.

7.2.2.1 Recurrence patterns

Option	Description
Now	Runs the object one time, starting immediately
Once	Runs the object once, at the specified start time. If you schedule an object with events, the object will run once, if the event is triggered between the start and end times. Select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Hourly	Creates an instance every hour, at the specified time. The first instance will be created at the specified start time, and instances will be created hourly at that time, until the object stops running at the specified end time. Select the frequency at which to run the object in the **Hour(N)** and **Minute(X)** lists, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Daily	Runs the object once daily, at the specified start time. The first instance will be created at the specified start time, and instances will be created daily at that time, until the object stops running at the specified end time. Enter the interval at which to run the object in the **Days(N)** box, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.

Option	Description
Weekly	Runs the object each week on the selected days, at the specified start time. 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 object stops running at the specified end time. Select a check box for each day that you want to run the object, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Monthly	Runs the object on the specified date, at the specified start time, and at the specified monthly intervals. The first instance will be created at the specified start time, and instances will be created in monthly intervals at that time, until the object stops running at the specified end time. Select the interval at which to run the object in the **Month(N)** box, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Nth Day of 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 object stops running at the specified end time. Enter the time to start and to stop running the object and the day of the month on which to run the object.
1st Monday of Month	Creates an instance on the first Monday of each month, at the specified start time. Enter the time to start and to stop running the object.

Option	Description
Last Day of Month	Creates an instance on the last day of each month, at the specified start time. Enter the time to start and to stop running the object.
X Day of Nth Week of the Month	Creates an instance each month on the specified day and week, at the specified start time. Enter the time to start and to stop running the object, the day of the week, and the week in the month to run the object.
Calendar	Creates an instance on each calendar date you specify, at the specified start time. Enter the time to start and to stop running the object, and select the calendar dates when you want to run the object.

7.2.3 To specify database logon information

Before you can specify database logon information, you must have access rights to an object's data source.

1. On the **Documents** tab, right-click the object for which to specify database logon information and select **Schedule**.
2. In the "Schedule" dialog box, click **Database Logon**.
3. Change the logon information for the object's data source as needed, and click **Schedule**.

7.2.4 To select an instance format

Depending on the type of object you are scheduling, you can select the format in which to save the object instance when BI platform generates it.

1. On the **Documents** tab, right-click the object for which to select an instance format and select **Schedule**.
2. In the "Schedule" dialog box, click **Formats**, and perform one of the following actions to select an output format:
   - For a Crystal report instance, select a format in the **Output Format** list.
   - For a Web Intelligence document instance, select a format in the **Format Options for Selected Document** list.
3. Set the remaining formatting options as needed.

   You may need to specify additional options for some Crystal report instance formats.
4. Set the remaining scheduling options as needed, and click **Schedule**.

7.2.4.1 Output file formats for instances

Crystal report file formats

You can send or schedule objects to different formats for each type of instance. For information about require options for scheduling a Crystal report to a specific format, see the exporting information in the *SAP Crystal Reports 2011 User's Guide*.

The Crystal Reports option preserves the most formatting of all options. When you select any other option, BI platform preserves as much formatting as the format allows. However, reports may lose some or all formatting.

Note:
If you choose to print a report when it is scheduled, the report instance is automatically sent to the printer in Crystal Reports format. This file format does not conflict with the file format you select when scheduling the report.

Format	Description
Crystal Reports	This `.rpt` format preserves the most formatting of all output format options. It produces a normal, editable report.
Crystal Reports (RPTR)	This `.rptr` format produces a read-only Crystal report.
Microsoft Excel (97-2003)	This `.xls` format attempts to preserve the look and feel of the original report. It preserves data and does not merge cells. You must specify some formatting properties for the report.

Format	Description
Microsoft Excel (97-2003) (Data Only)	This `.xls` format saves only data, and each cell represents a field.
Microsoft Excel Workbook Data-only	
Microsoft Word (97-2003)	This `.doc` format preserves as much formatting as possible, including graphics. Each object appears in an individual text field.
PDF	`.pdf` format
Rich Text Format (RTF)	This `.rtf` format preserves as much formatting as possible, including graphics. Each object appears in an individual text field. This option is available only from a web viewer.
Microsoft Word - Editable (RTF)	This `.doc` format preserves less formatting than the Microsoft Word (97-2003) option. Text appears in lines, and images are placed inline with text.
Plain Text	
Paginated Text	You must specify some formatting properties for the report.
Tab Separated Text (TTX)	This format places a tab character between values. You must specify some formatting properties for the report.
Separated Values (CSV)	This `.csv` format places a specified character between values. You must specify some formatting properties for the report. For example, if you select this option, you must enter characters for the separator and delimiter.
XML	`.xml` format

Web Intelligence file formats

Format	Notes
Web Intelligence	
Microsoft Excel	
Adobe Acrobat	`.pdf` format
Comma Separated Values (CSV)	`.csv` format

7.2.4.2 Crystal report instance formatting options

When you schedule a Crystal report instance to some output formats, you may need to set additional options.

Table 7-4: Microsoft Excel (97-2003) format

Option	Description
Page Range	• To include all pages in a report, select **All**. • To include a page range, select **Pages from**, type the first page number to include, and type the last page number to include in the **to** box.
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
Set Column Width	• To set the width of Excel columns based on objects in a report, select **Column width based on objects in the**, and choose a report area from which to take the column width in the list. • To set a constant column width, select **Constant column width (in points)**, and type the width in the box.
Export page header and page footer	• To choose when to export page headers and footers in an instance, select **Once Per Report** or **On Each Page**. • To exclude page headers and footers from an instance, select **None**.

Option	Description
Create page breaks for each page	Select this check box to create a page break after each page in a report
Convert date values to strings	Select this check box to export date values in a report as text strings
Show gridlines	Select this check box to view gridlines in exported documents

Table 7-5: Microsoft Excel (97-2003) (Data Only) and Microsoft Excel Workbook Data-only formats

Option	Description
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
Set Column Width	• To set the width of Excel columns based on objects in a report, select **Column width based on objects in the**, and choose a report area from which to take the column width in the list. • To set a constant column width, select **Constant column width (in points)**, and type the width in the box.
Export object formatting	Select this check box to preserve the object formatting.
Export images	Select this check box to export the images in a report.
Use worksheet functions for summaries	Select this check box to use summaries in a report to create worksheet functions in Excel.
Maintain relative object position	Select this check box to maintain the position of objects, relative to one another.
Maintain column alignment	Select this check box to preserve the alignment of text in columns in a report.

Option	Description
Export page header and page footer	Select this check box to include the header and footer in an instance.
Simplify page headers	Select this check box to use simple page headers.
Show group outlines	Select this check box to show group outlines.

Table 7-6: Microsoft Word (97-2003) format

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

Table 7-7: PDF format

Option	Description
Page Range	• To include all pages in a report, select **All**. • To include a page range, select **Pages from**, type the first page number to include, and type the last page number to include in the **to** box.
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
Create bookmarks from group tree	Select this check box to create bookmarks in a PDF file based on the tree structure of a report. This makes reports easier to navigate.

Table 7-8: Rich Text Format (RTF) format

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

Table 7-9: Microsoft Word—Editable (RTF) format

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

Table 7-10: Plain Text format

Option	Description
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
Number of Characters per Inch	Type a value between 8 and 16 to indicate the number of characters to include per inch. This setting determines how text files appear and are formatted.

Table 7-11: Paginated Text format

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

Table 7-12: Separated Values (CSV) format

Option	Description
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
Delimiter	Type the character to use as the delimiter.
Separator	Type the character to use to separate values, or select the **Tab** check box.
Mode	Select **Standard Mode** or **Legacy Mode**. When you select **Standard Mode**, you can choose report, page, and group sections to include in an instance. When you select **Legacy Mode** mode, you cannot choose report, page, or group section options.
Report and page sections	If you chose **Standard Mode**, select **Export** or **Do not export** to indicate whether to export report and page sections. If you selected **Export**, select the **Isolate report/page sections** check box if you want to isolate the report and page sections.

Option	Description
Group sections	If you chose **Standard Mode**, select **Export** or **Do not export** to indicate whether to export group sections. If you selected **Export**, select the **Isolate group sections** check box if you want to isolate the group sections.

Table 7-13: XML

Option	Description
Use the export options defined in the report	Select this check box to use the export options defined in a report. You cannot set any other formatting options.
XML Exporting Formats	Choose an XML export format, such as **Crystal Reports XML**.

7.2.5 To select a destination

You can schedule an object instance to be sent to a destination on your computer, on a network, at a default file location, in email, on a FTP server, or in SAP Jam or SAP StreamWork (if available).

The destinations available depend on which destinations your system administrator 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.

1. On the **Documents** tab, right-click the object for which to select a destination and select **Schedule**.
2. In the "Schedule" dialog box, click **Destinations**.

   The "Destinations" dialog box appears. The options available depend on which destination you chose.
3. Select a destination in the **Destination** list.
4. To save a copy of the instance, select the **Keep an instance in the history** check box.
5. To use the default settings for the destination, select the **Use default settings** check box.
6. Set the remaining destination options as needed.
7. Click **Schedule**.

7.2.5.1 Destinations

The following destinations are available:

- Default Enterprise Location
- BI Inbox
- Email
- FTP Server
- File System
- SAP StreamWork (if enabled and configured)

Table 7-14: Default Enterprise Location destination

Description	Instance is saved to
The publication is accessible from the folder it was created in. You can perform the following actions: • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file If you send a publication to this location, choose a folder that is accessible to all recipients.	Output File Repository Server Historical instances are saved to the default Enterprise server but not to any other destination.

Table 7-15: BI Inbox destination

Description	Instance is saved to
The publication is sent to each recipient's BI Inbox. You can perform the following actions: • Use the default settings for the destination • Deliver objects to individual users **Note:** To quickly locate a user, you can search for a recipient's user name, full name, or email address in the **Find title** box. • Use the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the *`File Extension`* placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Send the publication as a shortcut or a copy. If you send a publication to a recipient's BI Inbox shortcut, choose a folder that is accessible to all recipients. To send a publication shortcut to a BI Inbox, select both **BI Inbox** and **Default Enterprise Location** as the destination. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Specified BI Inboxes

Table 7-16: Email destination

Description	Instance is saved to
	• Output File Repository Server • Specified email recipients Before you can schedule or send a report instance to this destination, you must enable and configure the email (SMTP) destination on the Adaptive Job Server.

Description	Instance is saved to
Note: Before you select this destination, confirm that your email settings are configured properly on the Adaptive Job Server. The publication is sent to recipients in an email. You can perform the following actions: • Use the default settings for the destination • Deliver objects to individual users • (Required) Enter your email address in the **From** box. If you do not enter your email address, BI platform uses the email address associated with the publisher's account. If the publisher's account has no email address, BI platform uses the email address for the Adaptive Job Server. **Caution:** If there is no email address in the **From** box, the publisher's account, or the Adaptive Job Server, the publication will fail. • Enter recipient email addresses or add the `Email Address` placeholder to the **To** box • Enter recipient email addresses or add the `Email Address` placeholder to the **Cc** box • Enter recipient email addresses or add the `Email Address` placeholder to the **Bcc** box • Enter a subject or add placeholders to the **Subject** box • Enter information to deliver with the publication or add placeholders and embed a dynamic content document in the body of the email in the **Message** box • Attach source document instances to an email • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, enter a file extension or add the `File Extension` placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the docu-	

Description	Instance is saved to
ment. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	

Table 7-17: FTP Server destination

Description	Instance is saved to
The publication is sent to an FTP server. You must enter the FTP server location in the **Host** box. (If you do not, BI platform uses the FTP server configured for the Adaptive Job Server.) You can perform the following actions: • Use the default settings for the destination • Type the port number, user name and password, and account • Type a directory name • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the *`File Extension`* placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Selected FTP server

Table 7-18: File System destination

Description	Instance is saved to
The publication is sent to a directory on a file system. You must enter the directory for the publication. You can perform the following actions: • Use the default settings for the destination • Type a user name and password to access the file location • Deliver objects to individual users • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the `File Extension` placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Selected file location

Table 7-19: SAP StreamWork destination

Description	Instance is saved to
The publication is sent for collaboration with other users. **Note:** This destination is available if SAP StreamWork is configured and enabled in BI platform.	SAP StreamWork

The **Deliver objects to each user** check box is selected by default for all destinations. However, in some cases, you may not want to deliver objects to each user. For example, three recipients have identical personalization values so they receive the same data in publication instances. If you clear the **Deliver objects to each user** check box, one publication instance is generated and delivered to all

three recipients. If you select the **Deliver objects to each user** check box, the same publication instance is delivered three times (once for each recipient).

If you are sending the publication to the **FTP Server** or **File System** destination and some recipients share identical personalization values, you can clear the **Deliver objects to each user** check box to decrease overall processing time. When you clear **Deliver objects to each user**, placeholders used when configuring destinations will contain the publisher's (not the recipient's) information.

7.2.5.2 Destination options

Note:
You can change the default Adaptive Job Server settings in the **Servers** area of the CMC. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Table 7-20: Default Enterprise Location destination

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

Table 7-21: BI Inbox destination

Option	Description
Destination	**BI Inbox**
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. Clear this check box if you want BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server.

Option	Description
Use default settings	Select this check box to use the default Adaptive Job Server values for BI Inboxes. If you do not want to use the default Adaptive Job Server values, clear this check box, 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)	Type 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 type a name or select variables for the file name from the **Add placeholder** list. The available variables are `Title`, `ID`, `Owner`, `DateTime`, (your) `Email Address`, (your) `User Full Name`, and `File Extension`. Select the **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 may be unable to open the document.
Send As	• To send a shortcut to the instance to recipients, select **Shortcut**. • To send a copy of the instance to recipients, select **Copy**.

Table 7-22: Email destination

Option	Description
Destination	**Email**

Option	Description
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. Clear this check box if you want BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server.
Use default settings	Select this check box to use the default Adaptive Job Server values for email. If you do not want to use the default Adaptive Job Server values, clear this check box, and set the destination recipient options that appear.
From	Type a return email address, or select variables for the email address from the **Add placeholder** list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*. Click a variable to add it. Separate email addresses with a semicolon (;). **Note:** This option may be unavailable, depending on your system configuration.
To	Type each email address that you want to send the instance to, or select variables for the email address from the **Add placeholder** list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*. Click a variable to add it. Separate email addresses with a semicolon (;).
Cc	Type 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. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*. Click a variable to add it. Separate email addresses with a semicolon (;).
Bcc	Type the email address of each undisclosed recipient, or select variables for the email address from the **Add placeholder** list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*. Click a variable to add it. Separate email addresses with a semicolon (;).
Subject	Type the subject of the email, or select variables for the subject from the **Add placeholder** list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*. Click a variable to add it.

Option	Description
Message	Type the message for the body of the email, or select variables for the message from the **Add placeholder** list. The available variables are `Title`, `ID`, `Owner`, `DateTime`, (your) `Email Address`, (your) `User Full Name`, `Viewer`, and `Document Name`. Click a variable to add it.
Add Attachment	Select this check box if you want to add an attachment to the email message containing the instance.
File Name	• To use a system-generated file name for the instance, select **Use Automatically Generated Name**. • To choose the file name for the instance, select **Use Specific Name**, and type a name or select variables for the file name from the **Add placeholder** list. The available variables are `Title`, `ID`, `Owner`, `DateTime`, (your) `Email Address`, (your) `User Full Name`, and `File Extension`. Select the **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 may be unable to open the document.

Table 7-23: FTP Server destination

Option	Description
Destination	**FTP Server**
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. Clear this check box if you want BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server.

Option	Description
Use default settings	Select this check box to use the default Adaptive Job Server values for FTP servers. If you do not want to use the default Adaptive Job Server values, clear this check box, and set the destination recipient options that appear. You can change the values in the **Servers** area of the CMC. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.
Host	Type the IP address of the FTP server host computer where you want to send the instance.
Port	Type the port of the FTP server where you want to send the instance. The default is 21.
User Name	Type a user name with access rights to upload the object to the FTP server.
Password	Type the password required to access the FTP server.
Account	Type the account required to access the FTP server. **Note:** Account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.
Directory	Type the path to the FTP directory where you want to send the instance.
File Name	• To use a system-generated file name for the instance, select **Use Automatically Generated Name**. • To choose the file name for the instance, select **Use Specific Name**, and type a name or select variables for the file name from the **Add placeholder** list. The available variables are `Title`, `ID`, `Owner`, `DateTime`, (your) `Email Address`, (your) `User Full Name`, `Document Name`, and `File Extension`. Select the **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 may be unable to open the document.

Table 7-24: File System destination

Option	Description
Destination	**File System**
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. Clear this check box if you want BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server. **Note:** Instances are required for auditing events. This check box is overruled if auditing is enabled for a scheduled object.
Use default settings	Select this check box to use the default Adaptive Job Server values for the file system. If you do not want to use the default Adaptive Job Server values, clear this check box, and set the destination recipient options that appear.
User Name	Type a user name with access rights to save files to the destination directory. **Note:** You can specify a user name and password only for servers on Windows.
Password	Type the user password that is required to access the destination directory. **Note:** You can specify a user name and password only for servers on Windows.
Directory	Type 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.

Option	Description
File Name	• To use a system-generated file name for the instance, select **Use Automatically Generated Name**. • To choose the file name for the instance, select **Use Specific Name**, and type a name or select variables for the file name from the **Add placeholder** list. The available variables are `Title`, `ID`, `Owner`, `DateTime`, (your) `Email Address`, (your) `User Full Name`, `Document Name`, and `File Extension`. Select the **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 may be unable to open the document.

The **SAP StreamWork** destination is available if SAP StreamWork is enabled and configured in BI platform.

Table 7-25: SAP StreamWork destination

Option	Description
Destination	**SAP StreamWork**
Keep an instance in the history	Select this check box to retain a copy of this instance in the object's history. This check box is selected by default. Clear this check box if you want BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server.
Use default settings	Select this check box to use the default Adaptive Job Server values for SAP StreamWork. If you do not want to use the default Adaptive Job Server values, clear this check box, and set the destination options that appear.
File	This box displays the file name. You cannot change the name here.
Select Destination	Select an existing or new activity as the destination of the report. Use the first list to filter activities by worklist.

Option	Description
Select Worklist	Type the name of the worklist, or select it in the list.
Select Activity	Type the name of the activity, or select it in the list.
Activity Name	If the object will publish to a new activity, this box displays the name of the activity.
Activity Objectives	This box displays the activity's objectives, if available.
Item Description	(Optional) Type a description of the object's content to help participants understand what the object is and how to use it.
Select Activity Type	(Optional) Select the type of activity you are scheduling.
Add Participants	(Optional) If you are creating a new SAP StreamWork activity, type the email address of each participant (user) to invite to the activity. Separate email addresses with a comma.

7.2.6 To apply a record selection formula

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

1. On the **Documents** tab, right-click the object for which to apply a record or group selection formula and select **Schedule**.
2. In the "Schedule" dialog box, click **Filters**.
3. Change the record or group selection formula as needed.
4. Click **Schedule**.

7.2.7 To select print settings for a Crystal report

When you schedule a Crystal report, you can print the object instance after it is generated.

1. On the **Documents** tab, right-click the object for which to select print settings for a Crystal report and select **Schedule**.
2. In the "Schedule" dialog box, click **Print Settings**.
3. Select a print mode for the web viewer:
   - If you want to print the report in PDF, select **Always print to PDF (Preview)**.
   - If you want to use the report's default print settings, select **Follow Crystal Reports preference setting**.
4. If you want to print the report after it runs, select the **Print Crystal reports when scheduling** check box, and perform the following actions:
   a. Under **You can use the default printer or specify a printer**, select **Default printer** to use your default printer, or select **Specify the printer** and select a printer in the list.
   b. In the **Number of Copies** box, type the number of copies you want to print.
   c. Under **Page Range**, select **All** if you want to print every page in the report, or select **Pages** and type the first page number to print in the **from** box and the last page number to print in the **to** box.
   d. In the **Set collate option to** list, select **Collate**, **Do not collate**, or **Use printer defaults** to indicate whether to collate printed copies of the instance.
   e. In the **Page Scaling** list, select **Scale to fit**, **Only shrink to fit**, or **Do not scale**.
   f. To center each page, select the **Center the page** check box.
   g. To force horizontal pages to fit the paper, select the **Fit horizontal pages into one page** check box.
5. (Optional) Under **Specify page layout**, beside **Set layout to**, choose the page layout:
   - To use the report's page layout, select **Report file default**.
   - To use the printer's page layout, select **Specify printer settings**, and select **Default printer** or **Specify the printer**.

     If you chose **Specify the printer**, select a printer in the list.
   - If you want to choose the page layout, select **Custom settings**, and select **Use standard layout settings** or **Use custom layout settings**.

     If you chose **Use custom layout settings**, select **Portrait** or **Landscape** orientation, and select the paper size in the **Paper Size** list.
6. Click **Schedule**.

7.2.8 To schedule an object with parameters (prompts)

Parameters ask you to enter information. In report objects, the information you enter may determine which data appears in a report. In Web Intelligence documents, parameters are called prompts.

For example, in a report used by sales, a parameter may ask users to choose a region. When a user chooses a region, the report displays only results for that region.

Note:
If the object to schedule does not contain parameters, the **Prompts** option is not available.

1. On the **Documents** tab, right-click the object for which to schedule parameters and select **Schedule**.
2. In the "Schedule" dialog box, click **Prompts**.

   The way that parameter options appear may differ from object to object, depending on how your system administrator configured the parameter field. For example, program objects may appear in an **Argument** box.
3. In the "Prompts" dialog box, change the parameter values as needed:
   - For Crystal reports, click **Edit Values** to edit a parameter value.
   - For Web Intelligence documents, click **Modify** to edit a prompt value.
4. Click **Schedule**.

7.2.9 To schedule an object with events

Event-based scheduling provides additional control when you schedule objects. You can configure BI platform so that objects run after a specified event occurs. Working with events consists of two steps—creating an event and scheduling an object. After you create an event, you can select it as a dependency when you schedule an object. The scheduled job is then processed when that event occurs.

You create events in the Central Management Console (CMC), and then select the events in BI launch pad when you schedule objects. For more information about scheduling objects with events, see the *SAP BusinessObjects Business Intelligence Platform User Guide*.

1. On the **Documents** tab, right-click the object for which you want to schedule events and select **Schedule**.
2. In the "Schedule" dialog box, click **Events**.
3. To specify an event that will trigger the scheduled object, select the event in the **Available Events** list, and click **>** to move the event to the **Events to wait for** list.
4. To specify an event that will be triggered by the completion of the scheduling job, select the scheduled event in the **Available Schedule Events** list, and click **>** to move the event to the **Events to trigger on completion** list.

5. Click **Schedule**.

7.2.10 To select the scheduling server group for an object

1. On the **Documents** tab, right-click the object for which you want to select a server group and select **Schedule**.
2. In the "Schedule" dialog box, click **Scheduling Server Group**.
3. Perform one of the following actions:
   - (Default) Select **Use the first available server** to run the object on the server with the most resources free at the time of scheduling.
   - Select **Give preference to servers belonging to the selected group** to attempt to run the object on servers in the server group you choose, and then select a server group in the list. If no servers in the server group are available, the object is run on the next available server.
   - Select **Only use servers belonging to the selected group** to run the object only on servers in the server group you choose, and then select a server group in the list. If the specified servers in the server group are not available, the object is not processed.
4. If your deployment of BI platform uses federation and you want to run the object at the site where it is located, select the **Run at origin site** check box.
5. Click **Schedule**.

7.2.11 To select a cache format for Web Intelligence documents

Before selecting a cache option, confirm that Web Intelligence is selected as the output format for the object. If a different output format is selected, cache options will have no effect.

When BI platform runs a scheduled Web Intelligence document, an instance is generated and stored on the Output File Repository Server. You can select a cache format for the document to cache the report on the appropriate report server. If you do not select a cache format, BI platform will not cache the document.

1. On the **Documents** tab, right-click the object for which to select a cache format and select **Schedule**.
2. In the "Schedule" dialog box, click **Caching**.
3. Under **Select the formats to pre-load the cache with when scheduling**, select one or more check boxes.

   You can select more than one format to cache.
4. Under **Available locales**, select one or more locales for the cache, and click **>** to move the locale(s) to the **Selected locales** list.

When you schedule the document, BI platform preloads the format and locales you selected and generates cached versions of the document in the locale(s) you specified.

5. Click **Schedule**.

7.2.12 To select languages for Crystal report instances

1. On the **Documents** tab, right-click the object for which to select languages for report instances and select **Schedule**.
2. In the "Schedule" dialog box, click **Languages**.
3. Perform one of the following actions:
   - To schedule the report according to the preferred viewing locale set in your preferences and create instances using only that locale, select **Schedule the report in Preferred Viewing Locale**.
   - To schedule the report in multiple languages, select **Schedule the report in Multiple Locales**, select one or more locales in the **All Locales** list, and click **>** to move the locale(s) to the **Selected Instance Locales** list.
4. Click **Schedule**.

7.3 Pausing or resuming an instance

For objects with a status of Pending or Recurring, you can pause and then resume an object's scheduled instances.

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

7.3.1 To pause an instance

1. Right-click the object instance and select **History**.
2. In the "History" dialog box, select the scheduled instance that you want to pause.
3. Click **Pause**.

7.3.2 To resume a paused instance

1. Right-click the object instance and select **History**.
2. In the "History" dialog box, select the paused instance that you want to resume.
3. Click **Resume**.

7.4 Scheduling an object package

An object package is an object that acts as a container for other objects (also called components). You can put any object type that can be scheduled in an object package. You create and edit object packages in the Central Management Console (CMC).

To add objects to an object package, in the CMC, a user with appropriate access rights copies the object and pastes it in the object package. Components of an object package are separate from the object they were copied from; the objects are now components of the object package.

When you schedule an object package, instances are created for each component so that you can simultaneously schedule several objects. You cannot schedule one component in an object package without scheduling all components in the package. Scheduling an object package is slightly different from scheduling an individual object. You set the following scheduling options at an object-package level:

- Recurrence
- Destinations
- Events
- Server group settings

You set the following scheduling options for each component in the object package:

- Notification
- Database logon settings
- Filters (if applicable)
- Format
- Print settings
- Parameters or prompts
- Arguments (if applicable)

7.4.1 To schedule an object package

1. In IOMS-Content Explorer, locate and select the object package to schedule.
2. On the IOMS-Content Explorer toolbar, click **Actions**, and select **Schedule** in the list that appears.
3. In the "Schedule" dialog box, type a title for the instance in the **Instance Title** box.
4. Click **Recurrence**, and select a recurrence pattern in the **Run object** list for the object package.
5. Click **Events**, and select one or more events for the object package.
6. Click **Scheduling Server Group**, and select the server group for running the object package.
7. Click **Destinations**, and select the destination for the object package.
8. Click **Components**, click the name of a component, set the notification, database logon, filter, format, print, cache, and parameters or prompts for the component, and click **OK**.
9. Repeat step 8 for each component in the object package.
10. Click **Schedule**.

    The object package will run at the scheduled time, based on the options you selected.

7.5 Working with instances

An instance is a single publication of a report.

You can view discussions for an instance in the "History" dialog box or in the **Collaboration** drawer of the feed panel, if BI launch pad is integrated with SAP Jam or SAP StreamWork.

Related Topics

- Working with collaboration

  Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

7.5.1 To view the latest instance of an object

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

- Right-click the object and select **View**.

Tip:

If you have the necessary access rights, click on the viewer toolbar to refresh the report or document with the latest information from the data source.

The latest instance of the object appears in the viewer configured for the object.

7.5.2 Viewing historical instances

BI platform saves a history of object instances to the default Enterprise server for scheduled objects that run.

The "History" dialog box chronologically lists the object instances, with the most recent instances at the top of the list. Depending on the type of object you are viewing, the following historical information may be available:

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

7.5.2.1 To view the history of an object

1. Right-click the object and select **History**.
2. In the "History" dialog box, double-click a link in the **Instance Time** column to view the historical instance.

   Tip:

   Click beside the **Instance Time**, **Title**, **Status**, or **Created By** column heading to sort and display all instances by that column's information. The icon appears when you point at a column heading.

7.5.2.2 To empty your BI Inbox

You can delete all instances from your BI Inbox.

1. On the **Documents** tab, expand the **My Documents** drawer, and click **Inbox**.

The contents of your BI Inbox appear.

2. Click **Organize** > **Delete All Messages**.
3. When prompted, click **OK** to confirm the deletion.

Working with collaboration

Hosted on the web, SAP Jam or SAP StreamWork adds collaborative decision-making and social media to BI launch pad.

Before you can use collaboration, BI platform must be configured for collaboration. If no collaboration application is available in BI launch pad, contact your system administrator.

You can use collaboration to perform the following tasks:

- Send or schedule Crystal reports and Web Intelligence documents to SAP StreamWork activities
- Monitor SAP StreamWork feeds
- Post comments on documents and instances and view comments posted by other SAP Jam or SAP StreamWork users about public documents

You view and post comments for feeds on the feed panel.

8.1 Collaboration column

Collaboration features and options appear on the **Documents** tab in BI launch pad.

When someone makes a comment on a document or an instance, tooltips in the **Collaboration** column on the tab describe the status of feeds, and icons indicate whether a document has comments and whether you are following a feed.

Feature	Description
feed panel	Displays comments posted by other users for documents or instances that you have view or comment rights to. This is where you participate in discussions.
Collaboration drawer on the feed panel	Click the drawer to open or close the feed panel.
Collaboration column on the list panel	Contains icons that indicate the status of feeds and of your participation in them

Feature	Description
Follow and **Unfollow** right-click menu items	Enable you to follow or to stop following a feed. For convenience, the menu items are also available on the **More Actions** menu.
Collaboration destination (**Send** and **Schedule** menus)	Choose this destination to send or to schedule documents to SAP StreamWork for collaboration.

8.1.1 Icons in the Collaboration column

Icon	Indicates
	You are following the feed for this document or instance.
	Comments are posted for this document or its instances.
	No comments are posted for this document or its instances.

8.1.2 To show the Collaboration column

The **Collaboration** column appears by default if you administrator enabled it in the Central Management Console (CMC). If it is not enabled, you can display the column.

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **General**.
3. Under **Choose columns displayed in Documents tab**, select the **Collaboration / Discussion Status** check box.
4. Click **Save & Close**.

   The **Collaboration** column appears on the **Documents** tab.

8.1.3 To hide the Collaboration column

1. On the header panel, click **Preferences**.
2. In the "Preferences" dialog box, click **General**.
3. Under **Choose columns displayed in Documents tab**, clear the **Collaboration / Discussion Status** check box.
4. Click **Save & Close**.

   The **Collaboration** column no longer appears on the **Documents** tab.

8.2 Feed panel

The **Collaboration** drawer provides access to the feed panel, where you can see and post comments about documents for which you have view or comment access rights.

You can perform the following tasks in the feed panel:

- Follow or unfollow a feed
- Monitor comments about the feeds you follow
- Reply to posted comments
- Post news or start a discussion thread

When a document has multiple instances, the feed panel lists the instance names and run times. You select an instance in the list to display its feed. If the feed has comments, the comments appear on the feed panel.

8.2.1 Collaboration drawer features

Feature	Description
Drop-down list of instance names and run times	Chronologically lists instance names and run times, with the most recent instance at the top. Select an instance to view its feed.

Feature	Description
Say something box	Type a comment about a feed.
button	Click to refresh a feed to view the latest comments.
Post button	After typing a comment in the **Say something** box, click this button to add the comment to the feed.
button	Click to follow a feed.
button	Click to stop following a feed.

8.2.2 To open the feed panel

You can open the feed panel from anywhere in BI launch pad—for example, on a new tab or when viewing a document via an OpenDocument link.

1. Select a document, and click **<** on the details panel.

   The details panel opens, with the **Summary** drawer open.

2. Click the **Collaboration** drawer at the bottom of the panel.

   The **Collaboration** drawer opens, showing the feed panel.

   If you are using SAP Jam, you are automatically logged on to Jam.

3. If you are using SAP StreamWork and this is the first time you are accessing the feed, log on to SAP StreamWork.

After you are logged on, comments on documents and instances appear in the feed panel in BI launch pad.

To be notified about new comments on the document, you must follow the feed.

8.2.3 To resize the feed panel

Resize the feed panel when you need more reading space.

- Click the left edge of the panel and drag it to the width you want.

8.3 To display an SAP StreamWork custom home page

You can monitor updates to the feeds you follow on an SAP StreamWork custom home page in BI launch pad.

Before you can display an SAP StreamWork custom home page, you must have the appropriate access rights.

When you add a module to a BI workspace in BI launch pad and select the SAP StreamWork workspace, an **SAP StreamWork** custom home page appears by default beside the **Home** and **Documents** pages.

1. Select **Applications** > **BI workspace**.
2. Click **Module Library** to display all available modules, and click the BI launch pad modules icon to display a list of the modules you can add.
3. Drag the **SAP StreamWork Feed** module to the main pane of the window.

   An **SAP StreamWork** custom home page is added to BI launch pad.
4. Click **Exit Edit Mode** in the upper-right corner, and click **Yes** to exit.

   The "Save As" dialog box appears.
5. In the **Filename** box, type a title for the page.

   This text appears as the label on the **SAP StreamWork** page.
6. Beside **Assign Category**, select **Personal Categories** or **Corporate Categories**.
7. Click **Save**.

8.4 Access rights required for collaboration

To perform this task	You need this access right
Comment on a document or an instance	Comment on documents
Comment on a document or an instance that you own	Comment on documents the user owns
See a document or an instance	View comments on documents

To perform this task	You need this access right
See comments on a document or an instance that you own	View comments on documents the user owns

8.5 Document feeds

Document feeds enable you to monitor comments posted by other users and to participate in discussions.

You can monitor feeds on the **Documents** tab, on the feed panel, or on an **SAP StreamWork** tab (if available).

- For each document or instance for which you have the View comments on documents right and the View comments on documents the user owns right, you can view discussions on the feed panel.
- For each document or instance for which you have the Comment on documents right and the Comment on documents the user owns right, you can comment on discussions on the feed panel.

Note:
If you do not have the access right(s) needed for a document or an instance, contact your system administrator.

8.5.1 To refresh a feed

You can refresh a feed to see the latest comments on a document or instance, without refreshing the entire document.

For example, this is helpful when a report is pinned to a tab in BI launch pad and you want to refresh feeds for the report without refreshing the report.

- Click beside the **Post** button at the top of the feed panel.

8.5.2 To view collaboration comments for an instance on a new tab

1. On the **Documents** tab in BI launch pad, right-click an instance in a folder and select **History**.
2. In the "History" dialog box, right-click the instance and select **View Latest Instance**.

The instance opens on a new tab in the default viewer.

3. In the viewer, click **<** on the left side of the details panel to open the panel.
4. Click the **Collaboration** drawer to open it.

8.5.2.1 To follow a feed for an instance on a tab

When you follow a feed, you automatically follow all related instances of the document. When you follow a recurring instance, you follow each instance that results from the original instance.

- While viewing a document or instance on a tab, click at the top of the feed panel.

  The feed appears in the feed panel, you receive updates on the instance, and appears in the **Collaboration** column on the **Documents** tab in BI launch pad.

8.5.3 To view collaboration comments via an OpenDocument link

Once a document or instance is open, you can view comments for the document or instance by expanding the **Collaboration** drawer on the feed panel.

You can view an OpenDocument link on a tab or by clicking the link. For example, it can be helpful when you need to open several instances at the same time.

1. Right-click an OpenDocument link and select **Open in a new tab**.

   The document or instance opens on a new tab in the browser.
2. If the feed panel is closed, click **<** on the left side of the panel to open it.

   The feed panel opens on the tab beside the document or instance.
3. Click the **Collaboration** drawer to open it.

   The drawer opens, showing comments for the document or instance.

8.5.3.1 To follow a feed from an OpenDocument link

When you follow a feed, you automatically follow all related instances of the document. When you follow a recurring instance, you follow each instance that results from the original instance.

- While viewing a document or instance via an OpenDocument link, click at the top of the feed panel.

  The feed appears in the feed panel, you receive updates on the document or instance, and appears in the **Collaboration** column on the **Documents** tab in BI launch pad.

8.5.4 To follow a feed

If you want to be notified about new comments on the document, you must follow the feed.

Before you can follow a feed, you must have the following rights for the document or instance:

- View comments on documents
- View comments on documents the user owns

Existing comments on a document appear the first time you view the feed for a document or an instance. When you follow a feed on the feed panel, you automatically follow all related instances of the document. When you follow a recurring instance, you follow each instance that results from the original instance.

- On the **Documents** tab, right-click a document or instance and select **Follow**.

  Comments for the feed appear on the feed panel, and the **Collaboration** column displays the icon for the document or instance.

8.5.5 To post a comment to a feed

You can post comments to a feed about a document or an instance and view the discussion on the feed panel.

Before you can comment on a document or instance, you must have the following rights for it:

- Comment on documents
- Comment on documents the user owns

When you comment on an instance of a report, the comment is posted only for the instance (not the entire report) and a new discussion is started for that instance.

Caution:
Comments and replies are not private. Any BI launch pad user with the appropriate view rights to a document or instance can see your comments, and any user who with appropriate comment rights can reply to your comments.

1. In the **Collaboration** drawer on the feed panel, select an instance in the list.

2. Type a comment in the **Say something** box, and click **Post**.

   The comment appears on the feed panel, and appears in the **Collaboration** column to indicate this feed has a comment.

8.5.6 To stop following a feed

When you no longer want to follow comments for a document or instance, you can stop following its feed.

- On the **Documents** tab, right-click a document or instance and select **Unfollow**.

  You no longer receive updates on the document or its instances, and no longer appears in the **Collaboration** column.

8.5.6.1 To stop following a feed from an OpenDocument link

- While viewing a document or instance via an OpenDocument link, click at the top of the feed panel.

  You no longer receive updates on the document or its instances, and no longer appears in the **Collaboration** column on the **Documents** tab.

8.6 To schedule content to SAP StreamWork

You can schedule Crystal reports, Web Intelligence documents, and PDF files to SAP StreamWork.

1. On the **Documents** tab, right-click the document or the instance that you want to schedule and select **Schedule**.

   The "Schedule" dialog box appears.
2. Click **Destinations**, and then select **Collaboration** in the **Destination** list.

   The file name appears in the **File** box.
3. To save this instance in the "History" dialog box, select the **Keep an instance in the history** check box.
4. In the **Select Worklist** list, type the name of the worklist to schedule or select a name in the list.
5. In the **Select Activity** list, type the name of the activity to schedule or select a name in the list.

The activity name appears in the **Activity Name** box, and the activity objectives, if defined, appear in the **Activity Objectives** box.

6. (Optional) In the **Item Description** box, type a description of the content you are scheduling.
7. (Optional) In the **Select Activity Type** box, select the type of activity you are scheduling.
8. (Optional) In the **Add Participants** box, type each email address that you want to invite to the activity, separating the email addresses with a comma.

   SAP StreamWork sends an invitation to each email address you enter.
9. Click **Schedule**.

   The "History" dialog box appears, displaying the scheduled job as an instance with a status of Running.

8.7 To send content to SAP StreamWork

You can send Crystal reports, Web Intelligence documents, and PDF files to SAP StreamWork, where you can choose an existing activity or create one. The activity determines where a document appears in SAP StreamWork.

Tip:
To save the instance in the "History" dialog box, select **Keep an instance in the history**.

1. On the **Documents** tab, right-click the document or the instance that you want to send and select **Send > Collaboration**.

   The first time you choose this option, the SAP StreamWork logon window appears. The next time you choose it, SAP StreamWork opens in BI launch pad and displays your recent activities.
2. If necessary, log on to SAP StreamWork.

   Your account is authenticated.
3. In the **Select Worklist** list, type the name of the worklist to send or select a name in the list.
4. In the **Select Activity** list, type the name of the activity to send or select a name in the list.

   The activity appears in the **Activity Name** box, and the activity objectives, if defined, appear in the **Activity Objectives** box.
5. (Optional) In the **Item Description** box, type a description of the content you are sending.
6. (Optional) In the **Select Activity Type** box, select the type of activity you are sending.
7. (Optional) In the **Add Participants** box, type each email address that you want to invite to the activity, separating the email addresses with a comma.

   SAP StreamWork sends an invitation to each email address you enter.
8. Click **Send**.

   A summary dialog box appears, showing which activity was created, which file was included, which participants were invited to join, and a link to the activity in SAP StreamWork.
9. Click the link to go to the activity.

SAP StreamWork opens in a new browser window. New activities may take several minutes to appear, depending on the server load. The window displays a document icon for the activity. To open the document, you may need a viewer. To return to BI launch pad, click the OpenDocument link.

Publishing

9.1 About publishing

Publishing makes documents (such as Crystal reports and Web Intelligence documents) automatically available via email or FTP server, saved to disk, and managed through BI platform (for web viewing, archiving, retrieval, and scheduling).

In BI launch pad or the CMC, you can tailor documents to different users or recipients, schedule documents to run at intervals, and send the documents to multiple destinations, including BI Inboxes and email addresses.

9.2 What is a publication?

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

Publications can help send information through your organization more efficiently. For example:

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

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

9.3 Publishing concepts

9.3.1 Report bursting

During publishing, data in documents is refreshed against data sources and personalized before a publication is delivered to recipients—this combined 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.

  Note:
  This option is secure for most Crystal reports, regardless of whether reports are delivered in their original format.

- **One database fetch for each batch of recipients**: A publication is refreshed, personalized, and delivered to recipients in batches, based on the personalization values specified for the recipients. The batch size depends on the specified personalization value and is non-configurable. This report bursting method uses the data source logon credentials of the publisher to refresh data.

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

  Note:
  This option is not available for Web Intelligence documents.

- **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 to maximize security for delivered publications.

  For Crystal reports based on universes or on Business Views support, select this option to maximize security.

Related Topics

- To select a report bursting method

9.3.2 Delivery rules

Note:
This feature is not available for Web Intelligence documents.

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

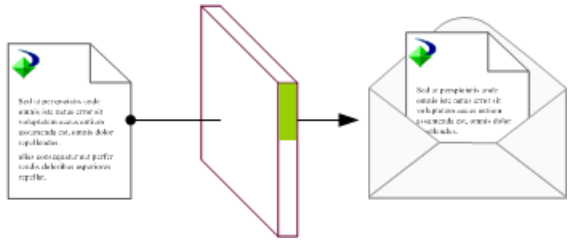
Delivery rule	Description
Global delivery rule	If the data in a designated document meets the delivery rule, the publication is delivered to all recipients. The designated document for a global delivery rule can be different from the document or documents used in a publication. For example, you can set a global delivery rule on a document that is used as a dynamic recipient source, instead of on a document in the publication.
Recipient delivery rule	If the data in the recipient's instance meets the delivery rule, the instance is delivered to all recipients.

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

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

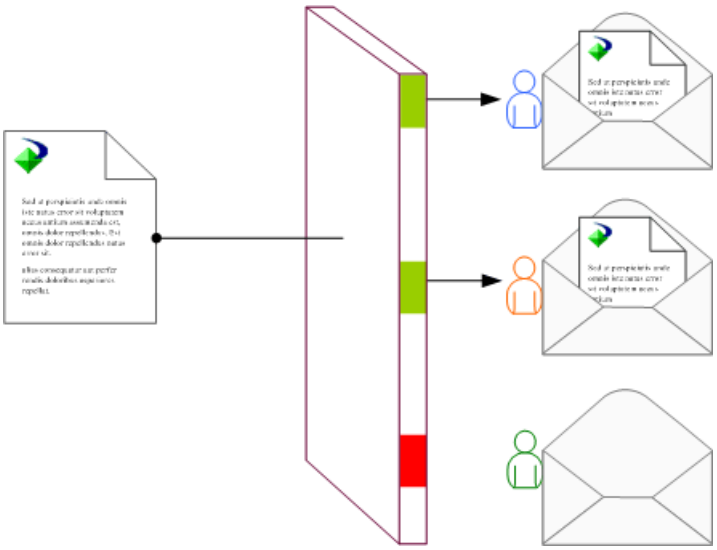
The following diagram illustrates how an alert-based global delivery rule works. The global delivery rule is set on a document in the publication. The Crystal report has a Revenue alert for values greater than 100,000. The publisher creates a global delivery rule based on the Revenue alert. The Crystal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

Figure 9-1: Global delivery rule is met



The following diagram illustrates how a recipient delivery rule works. The publisher creates a recipient delivery rule in which a Crystal report will be delivered only to recipients for whom the report contains data. When the report is personalized for each recipient, Green Recipient has no data in the Crystal report and does not receive the publication. Blue Recipient and Orange Recipient have data in the report and, therefore, receive the publication.

Figure 9-2: Recipient delivery rule is not met



In publications that contain multiple documents and objects, each document can have its own recipient delivery rule. The following options are available for processing and delivery:

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

Delivery rules are useful because they more efficiently process and distribute publications intended for many recipients. For example, a publisher at an insurance company creates a publication for its clients that contains the following objects:

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

In the insurance bill, there is an Amount Due alert for values greater than zero. The publisher creates an Amount Due recipient delivery rule for the insurance bill in which the insurance bill is published and

distributed only if a client owes a payment. The publisher also specifies that the entire publication should not publish if the insurance bill fails to meet the delivery rule; he does not want clients to receive a monthly statement and a brochure when they do not owe a payment. When the publication runs, the publication is processed and distributed only to clients who owe payments.

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

Related Topics

- (Optional) To set a global delivery rule on a Crystal report
- (Optional) To set a recipient delivery rule on a Crystal report

9.3.3 Dynamic recipients

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

To distribute a publication to dynamic recipients, use a dynamic recipient source—a document or custom data provider that provides information about publication recipients outside of BI platform. You can use one dynamic recipient source per publication to link directly to an external data source and retrieve the latest data for dynamic recipients. Dynamic recipient sources decrease administrative costs because you do not have to create BI platform user accounts for dynamic recipients before distributing publications to them.

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

You can perform the following actions with a dynamic recipient source:

- Simultaneously deliver a single publication to dynamic recipients and to BI platform users

  Note:
  Dynamic recipients cannot unsubscribe themselves automatically from a publication.

- Preview dynamic recipients list when you create a publication
- Specify whether to deliver a publication to all dynamic recipients or to exclude some dynamic recipients
- Deliver publications to external destinations, such as email or an FTP server

Note:
BI Inbox is not a valid destination for dynamic recipients because they do not have a user account in BI platform.

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

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

The **Recipient ID** column determines the number of dynamic recipients who will receive the publication. Sort dynamic recipient sources by recipient ID.

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

9.3.4 Publication delivery destinations

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

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

If you publish a publication as a compressed (`.zip`) file, you can compress or extract instances on a per-destination basis. For example, you can compress instances for email recipients and extract instances for BI Inboxes.

9.3.4.1 Destinations

The following destinations are available:

- Default Enterprise Location
- BI Inbox
- Email
- FTP Server
- File System
- SAP StreamWork (if enabled and configured)

Table 9-2: Default Enterprise Location destination

Description	Instance is saved to
The publication is accessible from the folder it was created in. You can perform the following actions: • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file If you send a publication to this location, choose a folder that is accessible to all recipients.	Output File Repository Server Historical instances are saved to the default Enterprise server but not to any other destination.

Table 9-3: BI Inbox destination

Description	Instance is saved to
The publication is sent to each recipient's BI Inbox. You can perform the following actions: • Use the default settings for the destination • Deliver objects to individual users **Note:** To quickly locate a user, you can search for a recipient's user name, full name, or email address in the **Find title** box. • Use the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the `File Extension` placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Send the publication as a shortcut or a copy. If you send a publication to a recipient's BI Inbox shortcut, choose a folder that is accessible to all recipients. To send a publication shortcut to a BI Inbox, select both **BI Inbox** and **Default Enterprise Location** as the destination. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Specified BI Inboxes

Table 9-4: Email destination

Description	Instance is saved to
	• Output File Repository Server • Specified email recipients Before you can schedule or send a report instance to this destination, you must enable and configure the email (SMTP) destination on the Adaptive Job Server.

Description	Instance is saved to
Note: Before you select this destination, confirm that your email settings are configured properly on the Adaptive Job Server. The publication is sent to recipients in an email. You can perform the following actions: • Use the default settings for the destination • Deliver objects to individual users • (Required) Enter your email address in the **From** box. If you do not enter your email address, BI platform uses the email address associated with the publisher's account. If the publisher's account has no email address, BI platform uses the email address for the Adaptive Job Server. **Caution:** If there is no email address in the **From** box, the publisher's account, or the Adaptive Job Server, the publication will fail. • Enter recipient email addresses or add the *`Email Address`* placeholder to the **To** box • Enter recipient email addresses or add the *`Email Address`* placeholder to the **Cc** box • Enter recipient email addresses or add the *`Email Address`* placeholder to the **Bcc** box • Enter a subject or add placeholders to the **Subject** box • Enter information to deliver with the publication or add placeholders and embed a dynamic content document in the body of the email in the **Message** box • Attach source document instances to an email • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, enter a file extension or add the *`File Extension`* placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the docu-	

Description	Instance is saved to
ment. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	

Table 9-5: FTP Server destination

Description	Instance is saved to
The publication is sent to an FTP server. You must enter the FTP server location in the **Host** box. (If you do not, BI platform uses the FTP server configured for the Adaptive Job Server.) You can perform the following actions: • Use the default settings for the destination • Type the port number, user name and password, and account • Type a directory name • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the *`File Extension`* placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Selected FTP server

Table 9-6: File System destination

Description	Instance is saved to
The publication is sent to a directory on a file system. You must enter the directory for the publication. You can perform the following actions: • Use the default settings for the destination • Type a user name and password to access the file location • Deliver objects to individual users • Accept the default file name, enter a file name, or add placeholders. If you select **Use Specific Name**, type a file extension or add the `File Extension` placeholder to the box. • Automatically add the extension to file name **Caution:** If you do not add a file extension to a file name, you may be unable to open the document. • Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	• Output File Repository Server • Selected file location

Table 9-7: SAP StreamWork destination

Description	Instance is saved to
The publication is sent for collaboration with other users. **Note:** This destination is available if SAP StreamWork is configured and enabled in BI platform.	SAP StreamWork

The **Deliver objects to each user** check box is selected by default for all destinations. However, in some cases, you may not want to deliver objects to each user. For example, three recipients have identical personalization values so they receive the same data in publication instances. If you clear the **Deliver objects to each user** check box, one publication instance is generated and delivered to all

three recipients. If you select the **Deliver objects to each user** check box, the same publication instance is delivered three times (once for each recipient).

If you are sending the publication to the **FTP Server** or **File System** destination and some recipients share identical personalization values, you can clear the **Deliver objects to each user** check box to decrease overall processing time. When you clear **Deliver objects to each user**, placeholders used when configuring destinations will contain the publisher's (not the recipient's) information.

9.3.5 Personalized placeholders for publication source document names

A placeholder is a container for variable data. Incorporating personalized placeholders in file names helps recipients easily identify data that has been filtered. Recipients who belong to multiple user groups with different personalization values can distinguish between multiple versions of the same source document, without viewing its contents.

Note:
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.

For each filter used in a report, the following personalized placeholders appear:

- *%<field name>_VALUE%*

  For example, when you select 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 report. This placeholder is unique for each recipient.

- *%<field name>_NAME%*

  For example, when you select 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 Topics

- To select personalized placeholders for publication source documents

9.3.6 Personalized placeholders for email fields

For each filter used in a report 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 report. 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 you can use personalized placeholders in the **Subject** box and the **Message** box when emailing a publication, all source documents for the publication must be personalized 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).

9.3.7 Formats

A format defines the file type for a document in a publication. You can publish a single document in multiple formats; each format you choose will result in an instance of the document. Each instance can be delivered to multiple destinations. For publications with multiple documents, you can specify a different format for each document. For publications that contain Web Intelligence documents, you can publish a whole document or a report tab in a document to multiple formats.

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

Related Topics

- To specify publication formats for a Crystal report
- To specify publication formats for a Web Intelligence document

9.3.7.1 Publication format options

Document type	Format	Description
All document types	**mHTML**	This option publishes a document in mHTML format. You can embed the document's content as mHTML in an email. • For Crystal reports, you can embed the content of one report in an email. • For Web Intelligence documents, you can embed the content of one report tab in an email. Documents are output in the order that source documents are listed in the "New Publication" dialog box. For example, documents at the top of the dialog box appear at the top of the email.
	PDF	This option publishes a document as a static PDF file. When this option is used with PDF merging, documents are output in the order that source documents are listed in the "New Publication" dialog box. For example, documents at the top of the dialog box appear at the top of the merged PDF file.
	Microsoft Excel (97-2003)	This option publishes a document as a Microsoft Excel (`.xls`) file and preserves as much of the original formatting as possible.

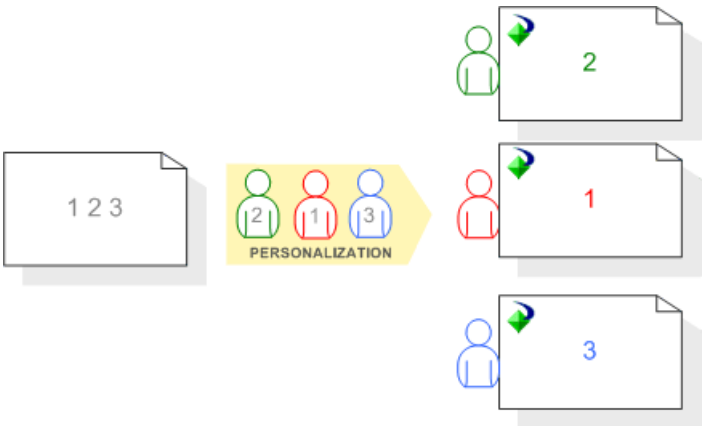
Document type	Format	Description
Crystal reports	**Microsoft Excel (97-2003) (Data Only)** **Microsoft Excel Workbook Data-only**	These options publish a Crystal report as an Excel (`.xls`) file that contains only data.
	XML	This option publishes a Crystal report in XML (`.xml`) format.
	Crystal Reports	This option publishes a Crystal report in its original (`.rpt`) format.
	Crystal Reports (RPTR)	This option publishes a Crystal report in read-only (`.rptr`) format.
	Microsoft Word (97-2003)	This option publishes a Crystal report as a Microsoft Word (`.doc`) file and preserves the original formatting of the Crystal report. Use this option when you expect recipients to view a publication without making changes to it.
	Microsoft Word - Editable (RTF)	This option publishes a Crystal report as a Word (`.rtf`) file that recipients can edit. Use this option when you expect recipients to view a publication and edit its content.
	Rich Text Format (RTF)	This option publishes a Crystal report in Rich Text Format (`.rtf`).
	Plain Text	This option publishes a Crystal report in plain text (`.txt`) format.
	Paginated Text	This option publishes a Crystal report in plain text (`.txt`) format and paginates the content of the publication.
	Tab Separated Text (TTX)	This option publishes a Crystal report in plain text (`.ttx`) format and separates the content in columns with tabs.

Document type	Format	Description
	Separated Values (CSV)	This option publishes a Crystal report as a character-separated values (`.csv`) file.
Web Intelligence documents	**Web Intelligence**	This option publishes a Web Intelligence document in its original (`.wid`) format.

9.3.8 Personalization

Personalization is the process of filtering data in source documents so that only relevant data appears to publication recipients. Personalization alters the view of data but does not change or secure the data being queried from the data source.

The following diagram illustrates how personalization works. For example, an unpersonalized report contains data types 1, 2, and 3. When personalization is applied to the report, users receive only data that is relevant to them. User 2 receives only data type 2, User 1 receives only data type 1, and User 3 receives only data type 3.



To personalize source documents:

- For Enterprise recipients, you must apply a profile when you design a publication. Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI platform. If you need profiles added to BI platform, contact your system administrator.
- 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.

Note:
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 Topics

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

9.3.9 Publication extensions

A publication extension is a library of code that applies business logic to publications. Use a publication extension when you need automated customization of publications after processing or delivery. You can use publication extensions to perform the following tasks after processing:

- 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 specify publication extensions in the Central Management Console (CMC).

Note:
You cannot use publication extensions if you are designing a publication in BI launch pad.

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

Related Topics

- To select publication extensions

9.3.10 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, you need a BI platform account and the following rights:

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

Related Topics

- To subscribe to or unsubscribe from a publication

9.3.11 PDF-file merging for Crystal reports

You can merge PDF instances of Crystal reports and static PDF documents into a single PDF file and then perform the following tasks on the merged PDF file:

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

All static PDF source documents are included in the merged PDF file. Static source documents that are not PDF files are excluded.

9.4 Access rights required for publishing

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

Role	Task	Rights required
Publisher	Schedule a publication	**Note:** Only the publisher should have Schedule a publication rights. • View rights, Schedule rights, Add rights, and Modify Security rights on the publication • Delete Instance rights on the publication • View rights on the users and the groups intended as recipients • View rights on the profile that is used for personalization • View rights and Schedule rights on documents on the publication • View rights and Refresh rights on the dynamic recipient source • View rights and Refresh rights on the document for which a delivery rule is set • Data Access rights on universes used by publication objects • Data Access rights on universe connections used • When scheduling to a BI Inbox, Add rights and View rights on each recipient's BI Inbox • On the folder containing the publication, Modify the rights users have to objects rights • Subscribe rights on recipients • When a publisher wants to print publication instances, Print rights on Crystal report source documents • If you selected **One database fetch per recipient**, Schedule on behalf of other users rights on Enterprise recipients

Role	Task	Rights required
Publisher	Retry a failed publication instance	• Edit rights on the publication instance • View rights, Subscribe rights, Add rights, and Modify Security rights on the publication • Delete Instance rights on the publication • View rights on the users and groups intended as recipients • View rights on the profile used for personalization • View rights and Schedule rights on documents in the publication • View rights and Refresh rights on the dynamic recipient source • View rights and Refresh rights on the document for which a delivery rule is set • Data Access rights on universes used by publication objects • Data Access rights on universe connections used • When scheduling to a BI Inbox, Add rights and View rights on each recipient's BI Inbox • On the folder containing the publication, Modify the rights users have to objects rights • Subscribe rights on recipients • When a publisher wants to print publication instances, Print rights on Crystal report source documents • If you selected **One database fetch per recipient**, Schedule on behalf of other users rights on Enterprise recipients

Role	Task	Rights required
Publisher	Redistribute a publication instance	• View rights, Schedule rights, Add rights, and Modify Security rights on the publication • Add rights and View rights on each recipient BI Inbox • View Instance rights and Edit rights on the publication instance
Recipient	View a publication	• View rights on the publication • View Instance rights on the publication These rights enable you to see a publication object in BI platform. You do not need these rights to see content sent to a BI Inbox.
Recipient	Subscribe to or unsubscribe from a publication	• View rights on the publication • Subscribe rights on Enterprise recipients

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

A publisher (the person who owns and schedules a publication) can view all publication instances for all recipients. Recipients can view only their own personalized publication instances. This setup ensures maximum security for publication data because only the publisher has rights to schedule publications and to view all publication instances.

Tip:
If you are a publisher and 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.

Working with publications

10.1 Designing publications

To design a new publication, use the publishing feature in BI platform. You can access publishing in the Central Management Console (CMC) or in BI launch pad, depending on your access rights and on your access to BI platform web-based applications.

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

10.1.1 Designing publications for Live Office

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

- Dynamic content documents can consist only of Crystal reports or Web Intelligence documents in 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.

Related Topics

- Personalization

10.1.2 Designing publications for SAP recipients

A publication intended for SAP recipients works the same way as a publication intended for Enterprise or dynamic recipients. However, SAP recipients have the following differences in a publishing workflow:

- You do not use personalization to design source documents for SAP recipients. Each SAP recipient has a profile value mapped to a user account outside of BI platform, and the profile value serves as built-in personalization. You do not need to create profiles and profile values for SAP recipients in BI platform or to map profiles to source document fields.
- The only report bursting method that works for a publication intended for SAP recipients is **One database fetch per recipient**. It maximizes security and individually processes the database logon credentials of each publication recipient.

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

10.1.3 To create a new publication in the CMC

1. Under **Folders** in the CMC, click the group tree, and locate the folder where you want to create a publication.
2. Right-click the folder and select **New > Publication**.

   The "New Publication" dialog box appears, with general property options displayed.
3. (Required) In the **Title** box, type the title of the publication.
4. (Optional) In the **Description** box, type a description of the publication.
5. (Optional) In the **Keywords** box, type keywords that are associated with the publication's content.
6. Click **Source Documents** in the navigation list, and then click the **Add** button.
7. In the "Select Source Documents" dialog box, select one or more source documents to add to the publication, and click **OK**.

   The **Refresh At Runtime** check box is selected by default for each source document. It refreshes the document against its data source when the publication runs.
8. If you do not want to refresh a source document when the publication runs, clear the **Refresh At Runtime** check box for the document.
9. Click **Save & Close**.

10.1.4 To create a new publication in BI launch pad

1. On the **Documents** tab, expand the **Folders** drawer, and locate the folder where you want to create a publication.
2. Right-click the folder and select **New > Publication**.

   The "New Publication" dialog box appears, with general property options displayed.
3. (Required) In the **Title** box, type the title of the publication.
4. (Optional) In the **Description** box, type a description of the publication.
5. (Optional) In the **Keywords** box, type keywords that are associated with the publication's content.

6. Click **Source Documents** in the navigation list, and click the **Add** button.
7. In the "Select Source Documents" dialog box, select one or more source documents to add to the publication, and click **OK**.

   The **Refresh At Runtime** check box is selected by default for each source document. It refreshes the document against its data source when the publication runs.
8. If you do not want to refresh source documents at runtime, clear the **Refresh At Runtime** check box.
9. Click **Save & Close**.

You must specify other information required for the publication—recipients, delivery formats and destinations, and how documents are personalized.

10.1.5 To open a publication

1. Locate the publication:
   - In BI launch pad, on the **Documents** tab, expand the **Folders** drawer.
   - In the Central Management Console (CMC), go to the **Folders** management area.
2. Right-click the publication and select **View**.

   The publication opens in a new window.

10.1.6 To define general properties for a publication

1. Right-click the publication for which you want to enter general properties and select **Properties**.

   The "Properties" dialog box appears, displaying the publication's general properties and title.
2. (Optional) In the **Description** box, type a description of the publication.
3. (Optional) In the **Keywords** box, type keywords that are associated with the publication's content.
4. Click **Save & Close**.

10.1.7 To select source documents

When choosing which source documents to include in a publication, the dynamic content document type determines which options are available.

Tip:
When sending source documents as an attachment or a merged PDF file, you can set the order in which documents appear. In the "New Publication" dialog box, in the **Source Documents** area, select a document in the **Selected** list, and click **Move Up** or **Move Down** to move the document to a different place in the order.

1. Right-click a publication and select **Schedule**.

   The "Properties" dialog box appears, displaying the publication's general properties and title.
2. In the "New Publication" dialog box, click **Source Documents**.
3. Click **Add**.

   The "Select Source Documents" dialog box appears.
4. Locate and select dynamic content documents of the same document type to include in the publication, and click **OK**.

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

   The source documents you selected appear in the **Selected** list in the "New Publication" dialog box.

   The check box in the **Refresh At Runtime** column is selected by default for the source document. When this check box is selected, the document is refreshed against its data source when the publication runs.
5. If you do not want to refresh a source document against its data source when the publication runs, clear the check box for that document in the **Refresh At Runtime** column.

   Tip:
   To improve system performance, clear the check box in the **Refresh At Runtime** column for each document you do not need to refresh.
6. Click **Save & Close**.

10.1.8 To select Enterprise recipients

1. Right-click a publication and select **Schedule**.

   The "Schedule" dialog box appears.
2. Click **Destinations** in the navigation list, and click **Enterprise Recipients**.
3. Choose recipients for the publication:
   a. Under **Available**, click **User List** to display a list of all users in BI platform or **Group List** to display a list of all user groups in BI platform.
   b. Select users or user groups, and move the users or groups to the **Selected** list.

   Tip:
   Type 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.

Tip:

- Press **Shift** + **click** or **Ctrl** + **click** to select multiple users or groups.
- To exclude recipients, select a user or user group in the **Selected** list, and move the user or group to the **Excluded** list.

4. Click **OK**.

10.1.9 To select dynamic recipients

Before you can specify dynamic recipients, you must have a dynamic recipient source designed and ready for use.

Dynamic recipients are recipients who are not BI platform users. The dynamic recipient source contains recipient data; it can be a Crystal report, a Web Intelligence document, or a custom-coded data provider. For information about creating a custom-coded dynamic recipient source, see the *SAP BusinessObjects Business Intelligence Platform Java SDK Developer Guide*.

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

Tip:
To more efficiently process publications, use the **Recipient Identifier** list to sort recipient data by the recipient ID.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.

2. Click **Dynamic Recipients** in the navigation list.

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

3. Under **Choose the source for the dynamic recipients**, select either **Web Intelligence Report Dynamic Recipient Provider** or **Crystal Reports Dynamic Recipient Provider**.
4. Locate and select the object to use as a dynamic recipient source, and click **OK**.
5. If you chose a Web Intelligence document as a dynamic recipient source, in the **Select the datasource name for the document** list, select a query that appears in the document.
6. In the **Recipient Identifier (required)** list, select a field that contains the recipient identity values.
7. (Optional) In the **Full Name** list, select a field that contains the full names of recipients.
8. If you intend to deliver the publication to email addresses, in the **Email** list, select a field that contains the recipient email addresses.

9. Decide which recipients in the dynamic recipient source to distribute the publication to:
   - To send the publication to all dynamic recipients, select the **Use entire list** check box.
   - To send the publication to particular dynamic recipients, clear the **Use entire list** check box, and then, under **Available**, select the check box for a recipient, and move the recipient to the **Selected** list.

   Tip:
   Type 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.

   Tip:
   To exclude a recipient, select the check box for the recipient, and move the recipient to the **Excluded** list.

10. Click **OK**.

After specifying dynamic recipients for the publication, you can personalize the publication for dynamic recipients. To do this, map a field in the source document to a column in the dynamic recipient source.

10.1.10 To select a destination for a publication

Enterprise recipients must have "View" rights on a publication to view publication instances. Dynamic recipients do not have a BI account and cannot access the publication instance.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.

2. Click **Destinations**.
3. (Optional) To avoid storing publication instances on your system, clear the **Default Enterprise Location** check box under **Select Destinations**.
4. Set a low instance limit on the publication object.

   For instructions, see the *SAP BusinessObjects Business Intelligence Platform User Guide*.

5. Under **Select Destinations**, select the check box beside each destination that you want to send the publication to.

   If you want to create a shortcut to the publication, select both **BI Inbox** and **Default Enterprise Location** as destinations.

   If the publication will be sent to email recipients and you want to embed a link to the Enterprise location in the email body, select both **Email** and **Default Enterprise Location** as destinations.

   The destination you chose appears in the **Show options for selected destinations** list. If you selected multiple destinations, options appear for the last check box you selected.

6. If necessary, select a destination to configure in the **Show options for selected destinations** list.

   Options for the destination appear.

7. (Optional) To choose a name for the publication, select **Use Specific Name**, and type a name or select a placeholder in the **Add placeholder** list.

If you do not choose a name, a system-generated name is assigned to a publication.

When the publication runs, a value will be inserted in each placeholder.

8. (Optional) If you selected **Use Specific Name** and the publication contains multiple documents to which you want to assign individual names, select the **Specific Name per Document** check box, and type a name or select a placeholder in the **Add placeholder** list for each document.

   If you do not choose a name, the same system-generated name is assigned to each document.

9. (**Email** only) To embed a link to the Enterprise location in the email body, position the cursor in the **Message** box, and select `Viewer` in the **Add placeholder** list under the box.

   The placeholder `%SI_VIEWER_URL%` is inserted in the email body. It will be replaced by a link when the publication runs.

   Tip:
   If you are unable to embed a link, confirm that you selected both **Email** and **Default Enterprise Location** as the destination.

10. (**BI Inbox** only) Under **Send As**, click **Shortcut** to create a shortcut to the publication or **Copy** to create a copy of the publication.

    Tip:
    If you are unable to create a shortcut, confirm that you selected both **BI Inbox** and **Default Enterprise Location** as the destination.

11. If you selected multiple destinations, repeat steps 5 to 10 for each destination to select and configure the destination.
12. Click **OK**.

10.1.10.1 Publication delivery destinations

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

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

If you publish a publication as a compressed (`.zip`) file, you can compress or extract instances on a per-destination basis. For example, you can compress instances for email recipients and extract instances for BI Inboxes.

10.1.11 To select a recurrence pattern

The recurrence pattern determines how often a publication runs.

1. Right-click a publication and select **Schedule**.
2. In the "Schedule" dialog box, click **Recurrence**.
3. In the **Run object** list, select a recurrence pattern.
4.
5.
6. Click **Schedule**.

The publication runs at the scheduled times.

10.1.11.1 Recurrence patterns

Option	Description
Now	Runs the object one time, starting immediately
Once	Runs the object once, at the specified start time. If you schedule an object with events, the object will run once, if the event is triggered between the start and end times. Select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Hourly	Creates an instance every hour, at the specified time. The first instance will be created at the specified start time, and instances will be created hourly at that time, until the object stops running at the specified end time. Select the frequency at which to run the object in the **Hour(N)** and **Minute(X)** lists, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.

Option	Description
Daily	Runs the object once daily, at the specified start time. The first instance will be created at the specified start time, and instances will be created daily at that time, until the object stops running at the specified end time. Enter the interval at which to run the object in the **Days(N)** box, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Weekly	Runs the object each week on the selected days, at the specified start time. 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 object stops running at the specified end time. Select a check box for each day that you want to run the object, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.
Monthly	Runs the object on the specified date, at the specified start time, and at the specified monthly intervals. The first instance will be created at the specified start time, and instances will be created in monthly intervals at that time, until the object stops running at the specified end time. Select the interval at which to run the object in the **Month(N)** box, select when to start and to stop running the object in the **Start Date/Time** and **End Date/Time** lists, and enter the date of the start and the stop times.

Option	Description
Nth Day of 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 object stops running at the specified end time. Enter the time to start and to stop running the object and the day of the month on which to run the object.
1st Monday of Month	Creates an instance on the first Monday of each month, at the specified start time. Enter the time to start and to stop running the object.
Last Day of Month	Creates an instance on the last day of each month, at the specified start time. Enter the time to start and to stop running the object.
X Day of Nth Week of the Month	Creates an instance each month on the specified day and week, at the specified start time. Enter the time to start and to stop running the object, the day of the week, and the week in the month to run the object.
Calendar	Creates an instance on each calendar date you specify, at the specified start time. Enter the time to start and to stop running the object, and select the calendar dates when you want to run the object.

10.1.12 To select personalized placeholders for publication source documents

Before you can use personalized placeholders in publication instance names, you must have used personalization to filter data in source documents.

Tip:
You can combine text and placeholders—and use multiple placeholders—in a publication name.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Click **Destinations** in the navigation list.
3. Under **Show options for selected destinations**, select **Use Specific Name** and choose a placeholder for the publication name from the **Add placeholder** list.

   The placeholders you select appear in the **Specific Name** box for the document title.
4. To add individual documents:
   a. Under **Target Name**, select **Specific Name per Document**.
   b. For each document title, select a placeholder from the **Add placeholder** list.

   The placeholders you select appear in the **Specific Name** box for each document title.
5. Click **OK**.

After personalization is set up for a publication, personalized placeholders appear in the **Add placeholder** list in the "Destinations" dialog box.

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

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

1. Right-click a publication and select **Properties**.

   The "Properties" dialog box appears.
2. Click **Formats** in the navigation list.
3. Under **Documents**, select the dynamic content document that you want to embed in the email.
4. For Crystal reports, under **Format Options for Selected Document**, select the **mHTML** check box.
5. For Web Intelligence documents, choose whether to publish the entire document or one report tab in the document:
   a. Under **Output Format**, select the **mHTML** check box.
   b. Under **Output Format Details**, select **All reports** to publish the entire document or **Select one report** and choose a report tab in the list.
6. Click **Destinations** in the navigation list.
7. In the "Destinations" dialog box, under **Select Destinations**, select the **Email** check box.

   The email configuration options appear.

8. In the **From** box, type a name or email address or select *Email Address* from the **Add placeholder** list.

   For example, you can type Robert, Publisher, or publisher@sap.com. If you type a name, the name is appended to your email server—for example, Publisher@*emailserver*.

9. In the **Subject** box, type a subject or select a placeholder.

   If you personalized the report, personalized placeholders are available in the **Add placeholder** list.

10. In the **Message** box, type the message that you want to appear in the body of the mail.
11. To embed dynamic content in the **Message** box, position the cursor in the **Message** box where you want to embed content, and select *Report HTML Content* in the **Add placeholder** list.

    %SI_DOCUMENT_HTML_CONTENT% appears in the **Message** box. When the publication runs, the placeholder is replaced by personalized content from the dynamic content document.

12. If the publication contains other source documents, select the **Add Attachment** check box.

    Other source documents in the publication will be added to the email as attachments when the publication runs.

13. Click **OK**.

10.1.14 Crystal report design tasks

10.1.14.1 Personalizing Crystal reports with parameter values

You can personalize a Crystal report for recipients based on predefined parameter values for each recipient. Personalization that is based on parameter values may be overridden by other personalization methods.

For example, if a profile is mapped to a parameter and the profile value for an Enterprise recipient conflicts with the parameter value, the profile value will override the parameter value when the publication runs. Similarly, if a personalization value in the dynamic recipient source conflicts with a parameter value for a dynamic recipient, the parameter value will be overridden when the publication runs.

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

10.1.14.2 To personalize a Crystal report using parameter values

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

1. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Click **Personalization** in the navigation list.
3. Review the parameter values under **Parameters** and note any values that need to be changed.
4. To change a default value, click the **Edit Values** button beside the default parameter value, select or type the parameter value, and click **OK**.
5. Perform one of the following actions:
   - To override the default parameter personalization with Enterprise-recipient profile values, in the **Enterprise Recipient Mapping** column, select a profile in the list.

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

   - If you are using only default parameter values to personalize a report, select **Default value for all recipients** in the **Enterprise Recipient Mapping** column.

   Note:
   The **Enterprise Recipient Mapping** column appears only if the publication is intended for Enterprise recipients.
6. To override the default parameter personalization with dynamic recipient personalization values, in the **Dynamic Recipient Mapping** column, select a dynamic recipient source in the list.

   Note:
   The **Dynamic Recipient Mapping** column appears only if the publication is intended for dynamic recipients.

   If you are using default parameter values to personalize a report, select **Not Specified** in the **Dynamic Recipient Mapping** column.
7. Click **OK**.

10.1.14.3 To personalize a Crystal report by filtering fields

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

You can filter multiple fields in Crystal reports. When you use filters, a ViewTime selection formula is added to a report to filter data. The formula is applied when the publication runs; it is not saved in the report.

Note:

- Static-value profiles can filter only string fields in Crystal reports. To filter other types of fields, use expression profile values. If you map the incorrect type of field to the profile, personalization will fail.
- This feature is not available for Crystal reports in `.rptr` format.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.

2. Click **Personalization** in the navigation list.
3. Under **Local Profiles**, in the **Report Field** column, select a Crystal report field in the list.

   The list of available fields includes all database fields and recurring formulas in the main report and in not-on-demand subreports.

4. In the **Enterprise Recipient Mapping** column, select a profile in the list.

   This profile maps the report Central Management Console (CMC). field to profile values defined for Enterprise recipients. If the profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.

   Note:
   The **Enterprise Recipient Mapping** column appears only for publications intended for Enterprise recipients.

5. In the **Dynamic Recipient Mapping** column, select a dynamic recipient source in the list.

   The report field is mapped to a column in the dynamic recipient source that contains corresponding values.

   Note:
   The **Dynamic Recipient Mapping** column appears only for publications intended for dynamic recipients.

6. Repeat steps 2 to 5 for each report field you want to filter.
7. Click **OK**.

10.1.14.4 To specify publication formats for a Crystal report

You can select and configure more than one publication format for a Crystal report. When you select a format, the available formatting options appear. For some options, such as **Crystal Reports** and **Crystal Reports (RPTR)**, no formatting options appear and the default source document formatting is applied.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.

2. Click **Formats** in the navigation list.
3. Under **Format Options for Selected Document**, select a format to publish the Crystal report in.

   The options for the selected format appear.
4. Configure the formatting options as needed.
5. When the **Use the export options defined in the report** check box is available, perform one of the following actions:
   - Select the check box to use the default export options defined in the source document.
   - Clear the check box to configure export options for the format you selected, and then configure the options that appear.
6. Repeat steps 3 to 5 for each format in which you want to publish this Crystal report.
7. Click **OK**.

Repeat this task for each Crystal report in the publication.

10.1.14.4.1 Crystal report formatting options

Microsoft Excel (97-2003)

Option	Description
Page Range	• To publish the entire report as an Excel file, select **All**. • To publish specific report pages, select **Pages**, type the first page number in the **from** box, and type the last page in the **to** box.
If you clear the **Use the export options defined in the report** check box, the following options are available:	
Set Column Width	• To define column widths relative to objects in the report, select **Column width based on objects in the**, and select an option in the list—**Whole report**, **Report Header**, **Page Header**, **Group Header #**, **Details**, **Group Footer #**, **Page Footer**, or **Report Footer**. • To define a constant width for all columns, select **Constant column width (in points)**, and type a number in the box.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in the Excel file, and select an option in the list—**None**, **Once Per Report**, or **On Each Page**.

Option	Description
Create page breaks for each page	Select this check box to create page breaks that reflect the page breaks in the report.
Convert date values to strings	Select this check box to convert date values to text strings.
Show gridlines	Select this check box to include gridlines in the Excel file.

Microsoft Excel (97-2003) (Data Only)

Option	Description
If you clear the **Use the export options defined in the report** check box, the following options are available:	
Set Column Width	• To define column widths relative to objects in the report, select **Column width based on objects in the**, and select an option in the list—**Whole report**, **Report Header**, **Page Header**, **Group Header #**, **Details**, **Group Footer #**, **Page Footer**, or **Report Footer**. • To define a constant width for all columns, select **Constant column width (in points)**, and type a number in the box.
Export object formatting	Select this check box to preserve object formatting.
Export images	Select this check box to publish report images in the Excel file.
Use worksheet functions for summaries	Select this check box to use the report summaries to create worksheet functions for the Excel file.

Option	Description
Maintain relative object position	Select this check box to preserve the relative position of report objects.
Maintain column alignment	Select this check box to preserve the column alignment from the report.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in the Excel file, and select an option in the list—**None**, **Once Per Report**, or **On Each Page**.
Simplify page headers	Select this check box to simplify page headers.
Show group outlines	Select this check box to show group outlines from the report.

Microsoft Excel Workbook Data-only

Option	Description
If you clear the **Use the export options defined in the report** check box, the following options are available:	
Set Column Width	• To define column widths relative to objects in the report, select **Column width based on objects in the**, and select an option in the list—**Whole report**, **Report Header**, **Page Header**, **Group Header #**, **Details**, **Group Footer #**, **Page Footer**, or **Report Footer**. • To define a constant width for all columns, select **Constant column width (in points)**, and type a number in the box.
Export object formatting	Select this check box to preserve object formatting.

Option	Description
Export images	Select this check box to publish report images in the Excel file.
Use worksheet functions for summaries	Select this check box to use report summaries to create worksheet functions for the Excel file.
Maintain relative object position	Select this check box to preserve the relative position of report objects.
Maintain column alignment	Select this check box to preserve the column alignment from the report.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in the Excel file, and select an option in the list—**None**, **Once Per Report**, or **On Each Page**.
Simplify page headers	Select this check box to simplify page headers.
Show group outlines	Select this check box to show group outlines from the report.

Microsoft Word (97-2003)

Option	Description
Page Range	• To publish the entire report as a Word file, select **All**. • To publish specific report pages, select **Pages**, type the first page number in the **from** box, and type the last page in the **to** box.

PDF

The following options apply to source documents published as PDF files.

Option	Description
Page Range	• To publish the entire report as a PDF file, select **All**. • To publish specific report pages, select **Pages**, type the first page number in the **from** box, and type the last page in the **to** box.
If you clear the **Use the export options defined in the report** check box, the following option is available:	
Create bookmarks from group tree	Select this check box to publish a Crystal reports publication as a merged PDF file with a table of contents.

Rich Text Format (RTF)

Option	Description
Page Range	• To publish the entire report as an RTF file, select **All**. • To publish specific report pages, select **Pages**, type the first page number in the **from** box, and type the last page in the **to** box.

Microsoft Word - Editable (RTF)

Option	Description
Page Range	• To publish the entire report as a Word file, select **All**. • To publish specific report pages, select **Pages**, type the first page number in the **from** box, and type the last page in the **to** box.
If you clear the **Use the export options defined in the report** check box, the following option is available:	

Option	Description
Insert page break after each report page	Select this check box to create page breaks that reflect the page breaks in the report.

Plain Text

Option	Description
If you clear the **Use the export options defined in the report** check box, the following option is available:	
Number of Characters per Inch	Type the number of characters to appear per inch in the plain text file. The recommended range is between 8 and 16.

Paginated Text

Option	Description
If you clear the **Use the export options defined in the report** check box, the following options are available:	
Number of Lines per Page	Type a value to indicate how many lines are allowed on each page of the paginated text file.
Number of Characters per Inch	Type the number of characters to appear per inch in the paginated text file. The recommended range is between 8 and 16.

Tab Separated Text (TTX)

No additional options appear when you choose **Tab Separated Text (TTX)** as the formatting option.

Separated Values (CSV)

Option	Description
If you clear the **Use the export options defined in the report** check box, the following options are available:	
Delimiter	Type the character to use as a delimiter.
Separator	Type the character to use to separate values, or select the **Tab** check box to separate values with tabs.
Mode	Select **Standard Mode** (the default) or **Legacy Mode**. In standard mode, you can control how report pages and group headers and footers appear in CSV output.
Report and page sections	• Select **Export** to export report and page sections. • Select **Do not export** if you do not want to export report or page sections. • Select the **Isolate report/page sections** check box to isolate report and page sections.
Group sections	• Select **Export** to export group sections. • Select **Do not export** if you do not want to export group sections. • Select the **Isolate report/page sections** check box to isolate group sections.

XML

Option	Description
If you clear the **Use the export options defined in the report** check box, the following option is available:	

Option	Description
XML Exporting Formats	To specify the XML format, select an option in the list.

10.1.14.5 (Optional) To set print options for a Crystal report in a publication

Before you can set print options for the default printer, the printer must be installed and configured properly.

Note:

- This task is optional (not required to design or schedule a publication) but can improve publication performance.
- The Crystal Reports Job Server must run on an account that has sufficient privileges to access the printer you specify. For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

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

1. Right-click a publication and select **Schedule**.
2. In the "Schedule" dialog box, click **Print Settings**.
3. Under **Documents**, select the Crystal report that you want to print when the publication runs.
4. Select the **Print Crystal reports when scheduling** check box.

   The Crystal report print options appear.
5. Select **Default printer** to print to the Job Server's default printer, or select **Specify the printer** and select the printer's path and name:
   - If the job server runs on Windows, in the **Specify the printer** box, type *printserver**printername*

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

     For example, type lp -d *printername*
6. In the **Number of Copies** box, type the number of copies to print.

7. Under **Page Range**, select **All** to print all pages in the publication or **Pages** and enter the page range to print.
8. (Optional) In the **Set collate option to** list, select **Collate**, **Do not collate**, or **Use printer defaults**.
9. (Optional) In the **Page Scaling** list, select **Scale to fit**, **Only shrink to fit**, or **Do not scale**.
10. (Optional) To center report content on the page, select the **Center the page** check box.
11. (Optional) If the Crystal report is wide and you want it to print on one page, select the **Fit horizontal pages into one page** check box.
12. Click **Schedule**.

10.1.14.6 (Optional) To set a recipient delivery rule on a Crystal report

Note:
This task is optional (not required to design or schedule a publication) but can improve publication performance.

Recipient delivery rules determine whether a publication is delivered to a particular recipient after processing and personalization. After creating a publication, you can open the publication and change the delivery rules for it.

1. Double-click a publication to open it.
2. In the "New Publication" dialog box, expand **Additional Options**, and click **Delivery Rules**.
3. Under **Recipient Delivery Rule**, select **Deliver individual document when condition is met** or **Deliver all documents only when all conditions are met**.
4. In the **Condition** column beside each document, select the condition that must be met before the publication will be delivered.
5. Click **Save & Close**.

10.1.14.7 (Optional) To set a global delivery rule on a Crystal report

The Crystal report must contain an alert before you can set a global delivery rule.

Note:
This task is optional (not required to design or schedule a publication) but can improve publication performance.

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

1. Right-click a publication and select **Schedule**.
2. In the "Schedule" dialog box, click **Delivery Rules**.
3. Under **Global Delivery Rule**, click **Browse**.

The "Select a report that contains an alert" window appears, where you can select the Crystal report on which to set the global delivery rule.

4. Locate and select the Crystal report, and click **OK**.
5. In the **Condition** list, select the alert value that the report must include in order to meet the global delivery rule.
6. Click **Schedule**.

10.1.14.8 (Optional) Formatting merged PDF files

Note:
Formatting merged PDF files is optional (not required to design or schedule a publication) but can improve publication performance.

Before you can format a merged PDF file:

- Crystal reports must have titles in order to be included in a merged PDF file. To set the title for a report, open the report in SAP Crystal Reports, select **File > Summary Info**, and type a title for the report in the **Title** box on the **Summary** tab. Save the report and re-export it to the repository.
- In BI launch pad, in the "Schedule" dialog box, under **Source Documents**, the Crystal reports and PDF files that you want to merge must appear in the correct order.
- In BI launch pad, in the "Schedule" dialog box, under **Formats**, the **PDF** check box must be selected as a format for each Crystal report that you want to include in the merged PDF file.
- In BI launch pad, in the "Schedule" dialog box, under **Destinations**, the **Merge Exported PDF** check box must be selected for each destination that you want to send the merged PDF file to.

To ensure that Crystal reports will appear in the table of contents of the merged PDF file, for each Crystal report listed, select the report in the **Documents** list in the **Formats** area, clear the **Use the export options defined in the report** check box, and select the **Create bookmarks from group tree** check box.

10.1.14.8.1 (Optional) To format a merged PDF file

Note:
This task is optional (not required to design or schedule a publication) but can improve publication performance.

1. Double-click a publication to open it.
2. In the "Properties" dialog box, click **Merged PDF Options**.
3. Create a table of contents for the merged PDF file:
   a. Select the **Create Table of Contents** check box.
      The format options for the table of contents appear.
   b. In the **Title** box, type a title for the table of contents.

c. In the **Title Font** list, select the font, font size (in points), and font color for the title of the table of contents.
d. In the **Item Font** list, select the font, font size (in points), and font color for items in the table of contents.

4. Set the page number format for the merged PDF file:
   a. Select the **Apply Running Page Numbers** check box .

      The format options for page numbers appear.
   b. In the **Number Format** box, type a format for page numbers.

      By default, the format is set to `Page &p of &P`. You can change the format, but you must use `&p` as a placeholder for the current page number and `&P` as a placeholder for the total number of pages.
   c. In the **Number Location** list, select the page number orientation for the merged PDF file.
   d. In the **Number Font** list, select the font, font size (in points), and font color for the page numbers.
   e. If you want the table of contents to have page numbers, select the **Apply page numbers to Table of Contents pages** check box.
5. Set recipient logon credentials and permissions for recipient actions:
   a. Select the **Set Restrictions** check box.
   b. In the **User Password** box, type the password that recipients must enter to view the merged PDF file.
   c. In the **Owner Password** box, type the password that recipients must enter to edit the merged PDF file.
   d. To allow recipients to print the PDF file, select the **Allow Printing** check box.
   e. To allow recipients to modify the PDF file, select the **Allow Modification of Contents** check box.
   f. To allow recipients to copy and paste PDF contents, select the **Allow Copy and Paste (Required for Embedded Flash Objects to Run)** check box.
   g. To allow recipients to modify annotations in the PDF file, select the **Allow Modification of Annotations** check box.
6. Click **OK**.

10.1.14.9 (Optional) To configure database logon information for a Crystal report

Before you begin, confirm that database settings for the Crystal report are correct. Under **Folders** in the CMC, select the Crystal report, and select **Manage** > **Default Settings** > **Database Configuration** to check the database information or to enter new information.

Note:
This task is optional (not required to design or schedule a publication) but can improve publication performance.

You may need to modify the data source information that a Crystal report references, in the report itself. Open the Crystal report in SAP Crystal Reports, and select **Database** > **Set Datasource Location**. In the "Set Datasource Location" dialog box, select a connection or create a new connection.

This task lets you modify the database logon information that recipients require to log on to the database and refresh the data in the Crystal report.

1. Double-click a publication to open it.
2. Click **Database Logon**.
3. In the **Title** list, select a Crystal report.

   The database information for the Crystal report appears below the **Title** list.
4. Confirm that the information in the **Database Server** box and the **Database** box is correct.
5. In the **User** box, type the user name that recipients must use to log on.
6. In the **Password** box, type a password that recipients must use to log on.
7. Click **OK**.

10.1.15 Web Intelligence document design tasks

10.1.15.1 To specify publication formats for a Web Intelligence document

1. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Click **Formats** in the navigation list.
3. Under **Output Format**, select the check box for the format to publish the Web Intelligence document in:
   - **Web Intelligence**
   - **Microsoft Excel**
   - **Adobe Acrobat**
   - **mHTML**
4. If you selected **Comma Separated Values (CSV)**, under **Format Options and Settings**, perform the following actions:
   a. In the **Text qualifier** list, select a text qualifier.
   b. In the **Column delimiter** list, select a column delimiter.
   c. In the **Charset** list, select the character set.
   d. If you want to enter a new character set, select the **Enter a new charset** check box, and type the character set in the box.

e. If you want to use the settings configured as the default, select the **Set as default values** check box.
f. If you want to generate a comma-separated value for each data source, select the **Generate separate CSV per Data Provider** check box.

5. Repeat steps 3 to 4 for each format in which you want to publish the document.
6. Click **OK**.

Repeat this task for each dynamic content source document in the publication.

10.1.15.2 To personalize a Web Intelligence document using a global profile target

- Before you can use profiles to personalize data for Enterprise recipients, the profiles must be configured in BI platform.
- Before you can perform this task, the profile you want to use must have a global profile target.

You can personalize a Web Intelligence document for Enterprise recipients by filtering a global profile target. If the profile is not configured in BI platform, personalization will fail. If you need profiles added to BI platform, contact your system administrator.

Tip:
If you set the personalization options under **Global Profiles**, you do not have to set the personalization options under **Filters**.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Click **Personalization**.
3. Under **Global Profiles**, in the **Enterprise Recipient Mapping** column, select a profile in the list.

   This profile maps the document to the universe field (global profile target) that is filtered for Enterprise recipients.
4. Click **OK**.

10.1.15.3 To personalize a Web Intelligence document by filtering fields

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

Note:
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.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.

2. Click **Personalization**.
3. 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.

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

4. Under **Local Profiles**, in the **Enterprise Recipient Mapping** column, select a profile the list.

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

5. In the **Dynamic Recipient Mapping** column, select a profile in the list.

   The field in the source document is mapped to the column that contains corresponding values in the dynamic recipient source.

6. Repeat steps 3 to 5 for each field that you want to filter.
7. Click **OK**.

10.1.15.4 (Optional) To change the prompt value for a Web Intelligence document

Before you can change a prompt value, the document must contain a prompt.

Note:
This task is not required to design or schedule a publication, but it can improve publication performance.

You can use the default prompt value in a Web Intelligence document or perform this task to edit the prompt value.

1. Right-click a publication and select **Schedule**.
2. In the "Schedule" dialog box, expand **Additional Options**, and click **Prompts**.

   Web Intelligence documents that contain prompts appear.

3. Click **Modify**.

   The "Prompts" dialog box appears.

4. Click **Refresh Values**.

   A list of possible prompt values appears on the left.

5. Move a prompt value or values from the left list to the right list.
6. Click **Apply**.

   The list of prompt values is updated.

10.1.16 Optional publication features

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

10.1.16.1 To select publication extensions

Before you can use a publication extension, the extension must be deployed on all computers that run the Adaptive Processing Server. The location varies, depending on the operating system:

- In Windows, the location is `INSTALLDIR\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\java\lib\`
- In Unix, the location is `INSTALLDIR/sap_bobj/enterprise_xi40/java/lib/`

After a publication extension is deployed, you must restart the Adaptive Processing Server and 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. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Expand **Additional Options**, and click **Publication Extension**.
3. In the **Publication Extension Name** box, type a name for the extension.
4. In the **Class Name** box, type the fully qualified class name for the extension.
5. (Optional) In the **Parameter** box, type a parameter name.
6. To use the extension after processing but before delivery, above the **Before Publication Delivery** list, click the **Add** button.

   The extension is added to the **Before Publication Delivery** list.
7. To use the extension after delivery, above the **After Publication Delivery** list, click the **Add** button.

   The extension is added to the **After Publication Delivery** list.
8. Click **Save**.
9. Repeat steps 2 to 8 for each extension you want to add.

   Tip:
   To define the order in which to execute publication extensions, click **Move Up** or **Move Down** under the **Before Publication Delivery** list or the **After Publication Delivery** list.

10.1.16.2 To configure email notification for publication jobs

Before you can use the Adaptive Job Server defaults for email notification, the server must be properly configured.

Perform this task if you want to receive email notification after a publication job runs.

Note:
This feature is available only in the CMC.

1. Double-click a publication to open it.

   The "Properties" dialog box appears.
2. Click **Notification**, and expand **Email Notification: Not in use**.
3. To receive email notification for successful publication jobs, select **A job has been run successfully**, and perform either of the following actions:
   - To use the Adaptive Job Server defaults, click **Use the Job Server's defaults**.
   - To enter the email settings, click **Set the values to be used here**, and perform the following actions:

   a. In the **From** box, type an email address or a name.
   b. In the **To** box, type an email address to send the message to.
   c. In the **Cc** box, type the email address of each user who should receive email notification.
   d. In the **Subject** box, type the subject of the email.
   e. In the **Message** box, type a message that will accompany the notification email.
4. To receive email notification for failed publication jobs, select **A job has failed to run**, and perform either of the following actions:
   - To use the Adaptive Job Server defaults, click **Use the Job Server's defaults**.
   - To enter the email settings, click **Set the values to be used here**, and perform the following actions:
     - In the **From** box, type an email address or a name.
     - In the **To** box, type an email address to send the message to.
     - In the **Cc** box, type the email address of each user who should receive email notification.
     - In the **Subject** box, type the subject of the email.
     - In the **Message** box, type a message that will accompany the notification email.
5. Click **OK**.

10.1.16.3 To enable auditing notification for publication jobs

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

Note:
This feature is available only in the CMC.

1. Double-click a publication to open it.
   The "Properties" dialog box appears.
2. Expand **Additional Options**, click **Notification**, and expand **Audit Notification: Not in use**.
3. To audit successful publication jobs, select **A job has been run successfully**.
4. To audit failed publication jobs, select **A job has failed to run**.

10.1.16.4 To specify events

Event-based scheduling provides additional control over scheduling publications. You can set up events so that publications are processed only after an event occurs.

Perform this task if a publication job runs after an event occurs or if a publication job triggers an event when it stops running. For information about events, see the *SAP BusinessObjects Business Intelligence Platform User Guide*.

1. Double-click a publication to open it.
   The "Properties" dialog box appears.
2. Expand **Additional Options**, and click **Events**.
3. To specify file-based and custom events for a publication, click the **>** button to move events from the **Available Events** list to the **Events to wait for** list.
   The events trigger the publication job to run.
4. To specify schedule events for a publication, click the **>** button to move events from the **Available Schedule Events** list to the **Events to trigger on completion** list.
   The events occur after the publication job runs.
5. Click **OK**.

10.1.16.5 To select a server group

Perform this task if you want to use a particular server to process a publication. For information about server groups, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Note:
You cannot schedule publications across sites in federations.

1. Double-click a publication to open it.
   The "Properties" dialog box appears.
2. Expand **Additional Options**, and click **Scheduling Server Group**.
3. Select a server group option.
4. Select the **Run at origin site** check box if you want to run the publication job at its site of origin.
5. Click **OK**.

10.1.16.6 To specify a profile resolution method

When a profile conflict occurs, the profile resolution determines whether instances will be merged or delivered as separate documents.

1. Double-click a publication to open it.
   The "Properties" dialog box appears.
2. Expand **Additional Options**, and click **Advanced**.
3. Under **Profile Resolution Method**, select an option:
   - Select **Do not merge** if you want profiles from multiple user groups to result in separate documents.
   - Select **Merge** if you want to apply profiles from multiple user groups to the same document.
4. Click **OK**.

10.1.16.7 To select a report bursting method

Carefully select a report bursting method when a publication meets the following criteria:

- The publication contains Web Intelligence documents intended for Enterprise recipients.
- The profiles used for personalization have filter expressions.

The report bursting method determines how source documents are personalized, processed, and delivered. 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 may fail.

1. Double-click a publication to open it.
   The "Properties" dialog box appears.
2. Expand **Additional Options**, and click **Advanced**.
3. Under **Report Bursting Method**, select a report bursting method.

4. Click **OK**.

10.2 Post-design publication tasks

Tasks in this section are optional and can be performed after publication design.

10.2.1 Finalizing a publication

At any point during or after the publication design process, you can view a summary of a publication's properties on the "Summary" dialog box—including 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.

To open the "Summary" dialog box, click **Summary**. You can use other options on the navigation panel to change the properties, or you can save a publication and schedule it.

10.2.2 To test a publication

You can use test mode in BI launch pad to send a publication to yourself before sending it to recipients. You receive the same information that 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.

1. Right-click a publication and select **Test Mode**.
2. (Optional) In the "Test Mode" dialog box, modify the list of Enterprise recipients:
   a. Click **Enterprise Recipients**.
   b. Under **Available**, select users or groups, and click the **>** button to move the users or groups to the **Selected** list or the **Excluded** list.
3. (Optional) Modify the list of dynamic recipients:
   a. Click **Dynamic Recipients**.
   b. Under **Choose the source for the dynamic recipients**, select **Web Intelligence Report Dynamic Recipient Provider** or **Crystal Reports Dynamic Recipient Provider** in the list.
4. Click **Test**.

   The publication runs in test mode.

10.2.3 To subscribe to or unsubscribe from a publication

Enterprise recipients with appropriate access rights can subscribe to or unsubscribe from a publication or publication instances. For example, if a publication is scheduled to run twice a week, recipients can subscribe to the first publication instance but not to the second instance.

Note:
Dynamic recipients cannot subscribe to or unsubscribe from publication instances.

1. In the **Folders** drawer on the **Documents** tab, locate and select the publication that you want subscribe to or unsubscribe from.
2. Perform one of the following actions:
   - In the Central Management Console (CMC), select **Actions** > **Subscribe** or **Unsubscribe**.
   - In BI launch pad, right-click the publication and select **Subscribe** or **Unsubscribe**.

Tip:
To subscribe to or unsubscribe from publication instances, select the publication, and then select **Actions** > **History** in the CMC or right-click the publication and select **History** in BI launch pad. In the "History" dialog box, select an instance, and subscribe to or unsubscribe from it.

10.2.4 To schedule a publication to run

You must design and save a publication before you can schedule it to run.

When you schedule a publication, you can use the settings under **Recurrence** or enter new settings. You can change the recipients each time you schedule a publication.

1. Right-click a publication and select **Actions** > **Schedule** in the CMC or select **Schedule** in BI launch pad.
2. In the "Schedule" dialog box, click **Recurrence**, and confirm that the option selected in the **Run object** list is correct.
3. Click **Schedule**.

   The publication runs as specified.

Tip:
To view the progress of a publication job while it runs, right-click the job and select **Actions** > **History** in the CMC or **History** in BI launch pad. In the **Status** column, click the status (Success, Failed, or Running), and click **View Log File** at the bottom of the "Publication History" dialog box.

10.2.5 Viewing publication results

Viewing results as a publisher

You can view the results of a publication in various ways. 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.

Tip:
To quickly access a publication's history, right-click a publication and select **Actions** > **History** in the CMC or **More Actions** > **History** in BI launch pad.

Viewing log files for publication jobs

Log files are useful for troubleshooting a publication and for identifying which recipients did not receive a publication instance. 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-configurable. If you run a high-volume publication with many details, the publication instance may 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.

  Tip:
  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.

Viewing results as a recipient

The following table summarizes the ways that you can view a publication:

Destination	How to view the publication result
Default Enterprise location	**Note:** Dynamic recipients cannot log on to BI platform to view publication results. As a recipient, you can view only your own personalized publication instances in BI platform. You cannot view publication instances that are personalized for other recipients. 1. Perform either of the following actions to start the CMC: • In Windows, select **Start** > **Programs** > **SAP Business Intelligence** > **SAP BusinessObjects BI platform 4** > **SAP BusinessObjects BI platform Central Management Console**. • In a web browser, type http://*<Server Name>*:*<ConnectionPort>*/CMC Replace *<ServerName>* with your CMS name, and replace *<ConnectionPort>* with your connection port number (specified during installation). The default connection port number is 8080. 2. Enter your logon credentials: • In the **System** box, confirm that the CMS name and CMS port are correct. • Type your user name and password. • In the **Authentication** list, select the authentication type. 3. Click **Log On**. 4. Under **Folders**, right-click the publication and select **History**. 5. In the "History" dialog box, click the link in the **Instance Time** column. 6. Double-click the instance that you want to view.

Destination	How to view the publication result
BI Inbox	**Note:** Dynamic recipients cannot log on to BI launch pad to view publication results. 1. Perform either of the following actions to start BI launch pad: • In Windows, select **Start** > **Programs** > **SAP Business Intelligence** > **SAP BusinessObjects BI platform 4** > **SAP BusinessObjects BI platform Java BI Launch Pad**. • In a web browser, type http://*<Server Name>*:*<ConnectionPort>*/BOE/BI Replace *<ServerName>* with your CMS name, and replace *<ConnectionPort>* with your connection port number (specified during installation). The default connection port number is 8080. 2. Type your logon credentials: • In the **System** box, confirm that the CMS name is correct. • Type your user name and password. • In the **Authentication** list, select the authentication type. 3. Click **Log On**. 4. Click **My Inbox**. 5. Double-click the instance you want to view.
Email	Log on to your email to view embedded publication content or to download the attachment or attachments.
FTP server	Log on to your FTP host.
Local disk	Go to the location specified when the publication was designed.

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

1. Right-click the publication and select **Actions** > **History** in the CMC or **History** in BI launch pad.

   The "History" dialog box appears.
2. Select a successful publication instance.
3. Perform either of the following actions:
   - In BI launch pad, select **More Actions** > **Reschedule**.
   - In the CMC, select **Actions** > **Reschedule**.
4. Choose which recipients will receive redistributed instances:
   - To redistribute an instance to Enterprise recipients, click **Enterprise Recipients**, and click the **>** button to move recipients from the **Available** list to the **Selected** list.
   - To redistribute an instance to dynamic recipients:

   a. Click **Dynamic Recipients**, and confirm that columns mapped to recipient IDs, full names, and email addresses are correct.
   b. To redistribute the publication to all dynamic recipients, select **Use entire list**.
   c. To redistribute the publication to selected dynamic recipients, click the **>** button to move recipients from the **Available** list to the **Selected** list.
5. Click **Redistribute**.

   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.

10.2.7 To retry a failed publication

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

1. Select the failed publication instance.
2. Perform either of the following actions:
   - In BI launch pad, select **More Actions** > **History**.
   - In the Central Management Console (CMC), select **Actions** > **History**.

   The instance status changes to Running.

If the publication fails again, review the new log file and fix any errors that occurred.

10.3 Improving publication performance

Adaptive Processing Server

Area	Consideration
CPU and memory	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.
	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.

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.

Area	Consideration
Many publication instances that execute concurrently	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. **Note:** 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.

Area	Consideration
Publications with many recipients	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. **Note:** • 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 `-Xmx` 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.
Publishing cleanup option	For a large publication that does not need redistribution or to view artifacts in the report, do not select the default destination.
Crystal report publications	If you do not need to apply unique security for each recipient, select **One database fetch for each batch of recipients**. Database access will be batched in multiple, smaller, concurrent queries.
Web Intelligence publications	Select **One database fetch for all recipients** or **One database fetch per recipient**. When you select **One database fetch for all recipients** for a large publication, to break 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	Consideration
Large publications with slow disk delivery to a single folder on Windows	Search for *disable short file name generation* (article ID 210638) or for *NtfsDisable8dot3NameCreation* on Microsoft TechNet at http://technet.microsoft.com and follow the instructions.
Large publications with slow disk delivery to a single folder that contains more than 300,000 files on Windows	Search for *how NTFS works* at 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** check box (in the "Schedule" dialog box) and/or the **Merge Exported PDF** check box (in the "Destinations" dialog box) is selected or when custom post-processing plugins are enabled on a publication.

Area	Consideration
Publications with both **Package as ZIP File** and **Merge Exported PDF** selected	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.

10.3.1 Recommendations for adding source documents

This section contains recommendations for adding 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**. In the "History" dialog box, click the link for the instance in the **Instance Time** column. The instance details appear in a new window.

If using parameter-based personalization for Crystal reports, set parameters to default

Parameter-based personalization may lead to slower publication performance. To significantly speed performance, personalize Crystal report publications by mapping fields to Enterprise recipient profiles or to dynamic recipient personalization values.

If you must personalize Crystal reports using parameters, in the "Personalization" section, set parameters to their default value.

Note:
Before you can use Enterprise recipient profiles in publications, the profiles must be configured in BI platform.

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. The following table summarizes how to check the settings:

Document type	How to check data source connection settings
Crystal report	In the CMC, select the Crystal report, and select **Manage > Default Settings**. In the "Default Settings" dialog box, click **Database Configuration** on the navigation panel.
Web Intelligence document	In the CMC, select the Web Intelligence document, and select **Manage > Default Settings**. 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, clear the **Refresh At Runtime** check box for that document to improve overall publication performance.

10.3.2 Recommendations for using dynamic recipient sources

Sort dynamic recipient sources 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 or when you selected **One database fetch for each batch of recipients** because it can reduce the number of deliveries to recipients with multiple personalization values.

For Crystal report dynamic recipient sources, confirm that database configuration information is correct

In the CMC, select the dynamic recipient source, select **Manage** > **Default Settings**, and confirm the following settings:

- Under **Database Configuration**, confirm the database logon information is correct and **Use same database logon as when report is run** is selected.
- Under **Parameters**, confirm that all parameters have values and all **Prompt when viewing** check boxes for parameters are cleared.

If using Crystal report dynamic recipient sources, contact your administrator and confirm that the RAS is configured correctly

The Report Application Server (RAS) must be configured to read at least the same number of database records as the number of recipients in the dynamic recipient source. For example, to process a dynamic recipient source with data for 100,000 recipients, the RAS must be set to read more than 100,000 database records.

10.3.3 Recommendations for sending and receiving email publication instances

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

You must ensure 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, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Working with alerting

11.1 Alerting

Alerting is a feature that spans applications in BI platform. You use alerting to manage objects and events on the basis of exception. Alerts notify you about changes and notify users and administrators when events are triggered.

Example: **Alerting and Crystal reports**

For example, Julie works at an auto insurance company and tracks the number of claims filed using a Crystal report. Julie subscribes to the daily Claim Number alert and chooses to receive her alert notification by email. After a week, the number of auto insurance claims reaches 10,000, meeting the alert's condition and triggering the alert. Julie receives an email notification and realizes that auto insurance claims have increased dramatically. She informs her manager and recommends launching a campaign to promote safer driving habits.

Subscribing to alerts

In BI platform, users and administrators can subscribe to alerts in BI launch pad or in the Central Management Console (CMC).

Enabling alerts

When new reports are created, report designers enable alerts. As events are triggered, notifications are sent to subscriber email addresses or to a BI system destination (for example, a BI launch pad account).

Viewing alert notifications

In BI platform, users and administrators view notifications in BI launch pad or in an email.

Right-click an alert and select **See More** to display alert information, including the alert's title, message, and trigger time.

Managing alerts

Content administrators and power users manage alerts in BI launch pad or in the CMC.

System administrators manage alerts in the CMC and control user access by assigning access rights.

11.1.1 Alert sources

Object that supports alerting	Description
Crystal reports	Crystal reports can contain multiple alerts. When you add a report containing alerts to the repository, BI platform automatically creates event objects that correspond to each alert in the report. Event objects are located in the `Crystal Reports Events` folder, under **Events**, in the CMC. You can search for alerts using **Content Search**. **Note:** Only reports created in BI platform support alerting and allow users to subscribe to alert notifications when the reports are added. To subscribe, locate the report, and perform the subscription task on the report object.
Events (file-based, schedule-based, and custom)	You can enable alerting for any event.

Monitoring uses alerting to notify system administrators of changes in the overall health of BI platform. Alerts based on monitoring probes are located in the `Monitoring Events` folder, under **Events**, in the CMC. For more information about monitoring, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Objects created in applications such as Information Steward and Event Insight also use alerting. For more information, see the application's documentation.

11.1.2 Differences between alerting and Crystal report alert notifications

In earlier versions of BI platform, you could configure Crystal report alert notifications when you scheduled reports. BI platform still supports this functionality for reports created in SAP Crystal Reports.

Key difference	Alert notifications in Crystal reports	Alerting in BI launch pad
Supported objects	Reports created in Crystal Reports	• Reports created only in Crystal Reports • Events • Monitoring probes • Information Steward alerts • Event Insight alerts
Supported destinations	Email	• **My Alerts** in BI launch pad • Email
Usage	You configure alerts when you schedule a Crystal report. Recipients can include Enterprise users or dynamic users. You must manually enter all recipient email addresses.	You subscribe to alert notifications from the alert source and can change a subscription as needed. Recipients can be Enterprise users or dynamic users. You must manually enter email addresses for dynamic recipients.

11.1.3 Alerting workflow

Alerting workflow for Crystal reports

1. The report creator designs a report that contains alerts in SAP Crystal Reports for Enterprise.
2. The report creator or a content administrator adds the Crystal report to a folder in the "Folders" or "Personal Folders" area of the CMC. When the report is added, BI platform automatically creates report event objects, based on the alerts in the report.
3. A user logs on to the CMC or to BI launch pad, locates the Crystal report, and subscribes to the alert.
4. The report creator or a content administrator schedules the Crystal report to run.

   If the alert condition is met, the alert is triggered and the user receives notification according to the subscription settings.

Alerting workflow for events

1. The content administrator creates an event in the CMC and enables alerting on the new event.

2. The user sees the alert in the "Events" area of the CMC or searches for the alert in BI launch pad, and subscribes to it.
3. The event occurs, triggering the alert.
4. The user receives notification that the event occurred according to the subscription settings.

11.1.4 Access rights required for alerting

Depending on your role in the alerting workflow and your responsibilities, the access rights you need may vary.

Table 11-2: Document alert rights

Role	Task	Rights required
User	Subscribe to a document alert	• "View" rights on the document • "View" rights on the corresponding event • "Subscribe" rights on the user's own account • (To view an instance via a document link in an alert notification) "View Instance" rights on the document
User	Unsubscribe from a document alert	• "View" rights on the corresponding event • "Subscribe" rights on the user's own account
User	Receive notification about a document alert	• "View" rights on the corresponding event • "View" rights on the document
Content administrator	Manage destination and parameter settings for a document alert	• "Edit" rights on the document • "Edit" rights on the event

Role	Task	Rights required
Content administrator	Manage alerting settings for a document	• "View" rights and "Edit" rights on the document • "View" rights and "Edit" rights on the corresponding event • "View" rights and "Subscribe" rights on the users or groups to add as subscribers **Note:** To add a user group to the list of subscribers, you must have "View" rights and "Subscribe" rights on the user group object. Having "View" rights and "Subscribe" rights on individual users in a group is not sufficient.
Content administrator	Unsubscribe a user from a document alert	• "View" rights on the document • "View" rights on the corresponding event • "View" rights and "Subscribe" rights on the user
Content administrator	Trigger a document alert	• "View" rights and "Schedule" rights on the document • "View" rights and "Trigger" rights on the corresponding event

Table 11-3: Event alert rights

Role	Task	Rights required
User	Subscribe to an event alert	• "View" rights on the event • "Subscribe" rights on the user's own account. By default, each user has "Subscribe" rights on her or his own account.
User	Unsubscribe from an event alert	• "View" rights on the event • "Subscribe" rights on the user's own account. By default, each user has "Subscribe" rights on her or his own account.

Role	Task	Rights required
Content administrator	Manage alerting settings for an event	• "View" rights and "Edit" rights on the event • "View" rights and "Subscribe" rights on users or groups to add as subscribers **Note:** To add a user group to the list of subscribers, you must have "View" rights and "Subscribe" rights on the user group object. Having "View" rights and "Subscribe" rights on individual users in a group is not sufficient.
Content administrator	Trigger an event	• "View" rights and "Trigger" rights on the event

Table 11-4: Alert notification rights

Role	Task	Rights required
User	Receive an alert notification	• "View" rights on the corresponding event
User	Mark an alert notification as read or unread	• "View" rights on the alert notification • "Subscribe" rights on the user account
User	Reread an alert notification	• "View" rights on the alert notification
User	Delete an alert notification in BI launch pad	• "View" rights on the alert notification • "Subscribe" rights on the user account

11.1.5 Locating alert source objects in BI launch pad

The way that you view alert sources depends on the object type of the alert source. The following table summarizes where alert sources are located:

Object type (alert source)	How to locate the object
Crystal report	Crystal reports can be stored in personal folders or in public folders. • To view a Crystal report in a personal folder, on the **Documents** tab, click the **My Documents** drawer, and click the **Favorites** node. The Crystal report appears. • To view a Crystal report in a public folder, on the **Documents** tab, click the **Browse Folders** drawer, and locate the folder containing the report.
Event (file-based, schedule-based, and custom)	Search for the name of an alerting-enabled event.

Tip:
If you subscribe to an alert, you can quickly view it. On the **Documents** tab, expand the **My Documents** drawer, and click **Subscribed Alerts**.

11.1.6 Viewing alert notifications

Alert notifications can be sent to a destination in BI launch pad or to subscriber email addresses. In BI launch pad, you can view alert notifications:

- On the **Home** tab, click **Unread Alerts** to display a list of your last 10 unread alert notifications.
- On the **Documents** tab, click the **My Documents** drawer, and click **My Alerts** to display alert notifications.

The "Alert Information" dialog box displays the alert message and the date and time when the alert was triggered. To display alert information, perform any of the following actions:

- On the **Home** tab, click a notification under **Unread Alerts**.
- In **My Alerts**, double-click an alert title.
- In **My Alerts**, right-click an alert title and select **See More**.

11.2 Alerting tasks

11.2.1 To subscribe to an alert

1. Right-click an alert source in the `public` folder and select **Subscribe**.
2. In the "Subscribe to Publication" dialog box, under **Destinations**:
   - To send the alert notification to a destination in the Business Intelligence system, such as BI launch pad, select the **InfoView Inbox** check box.
   - To send the alert notification to the email address specified for your user account in BI platform, select the **Email** check box, and confirm that your email address is entered correctly.

     Note:
     This destination is available if an email address is specified for your user account. If your email address is specified but is incorrect or not entered, you will not receive the alert notification.
3. To specify a parameter for the alert, under **Parameters**, click **Edit**, and modify the parameter value. If a document is personalized, personalization details appear when you hover the mouse over an alert check box.
4. If multiple documents are listed under **Alert**, select the check box for each alert you want to receive.

   Depending on the alert source, you may need to configure additional settings.
5. Click **OK**.

The next time the alert is triggered, a notification will be sent to the destination you selected. Notifications are sent using the destination defaults for alerting in the CMC, unless you specify custom settings for an alert source.

To change which destinations an alert notification will be sent to, on the **Documents** tab, expand the **My Documents** drawer, and click **Subscribed Alerts**. Right-click an alert source and select **Modify Subscription**. You can also select **More Actions** > **Modify Subscription** to modify your subscription to multiple Crystal report alerts from the same report or to edit parameters for EDBI alerts.

11.2.2 To unsubscribe from an alert

1. On the **Documents** tab, expand the **My Documents** drawer, and click **Subscribed Alerts**.
2. Right-click the alert that you want to unsubscribe from and select **Unsubscribe**.
3. When prompted for confirmation, click **OK**.

11.2.3 To subscribe other users to an alert

1. Right-click the alert source and select **Manage Subscribers**.
2. In the "Manage Subscribers" dialog box, click **Subscriber List** in the navigation panel.
3. To add new subscribers:
   a. Click **Add**.
   b. In the "Add" dialog box, move users and user groups from the **Available** list to the **Subscribed** list
   c. Click **Add Default Subscription(s)**.
   d. In the "Edit Subscriptions" dialog box, configure the alert and destination options as needed.

      For example, you can modify which alerts to subscribe to (if the alert source contains multiple alerts). Depending on the alert source, other settings may be available.
4. To edit settings for a subscriber:
   a. Select a user in the **Subscriber** column, and click **Edit**.
   b. To edit which alerts the user will receive, in the "Edit Subscriptions" dialog box, click **Alerts** in the navigation panel, and select the check box for each alert you want to subscribe the user to.

      If the alert source contains multiple alerts, each alert is listed. Otherwise, only one alert appears.
   c. To edit which destinations an alert will be sent to, click **Destinations** in the navigation panel, and select the check box for each destination you want to sent the alert to.

      Only email destinations that are enabled and configured on the Adaptive Job Server are available. If no email destination is configured, only the **My Alerts** check box appears.
   d. If available, configure other alerting options as needed.

      Depending on the alert source, additional options may be available.
   e. Click **Save & Close**.
5. Click **Save & Close**.

11.2.4 To exclude users from an alert

You can exclude users from an alert when you want to subscribe most, but not all, users in a group to the alert. First, you subscribe the entire group, and then you exclude users who do not need to receive alert notifications.

Note:
The **Excluded** list overrides all other subscription settings for a user.

1. Right-click the alert source and select **Manage Subscribers**.
2. In the "Manage Subscribers" dialog box, click **Excluded List** in the navigation pane.
3. Move users from the **Available** list to the **Excluded** list.
4. Click **Save & Close**.

Related Topics

- Locating alert source objects in BI launch pad

11.2.5 To manage custom alerting settings for an alert source

Notifications are typically sent using the default destination settings for alerting.

1. Right-click the alert source and select **Manage Alerting Settings**.
2. In the "Manage Alerting Settings" dialog box, select the **Enable My Alerts** check box to choose BI launch pad as a destination.

   Alert notifications will be sent to the subscriber's BI launch pad accounts. In BI launch pad, subscribers can view alerts in **My Alerts** on the **Documents** tab.
3. To choose email as a destination, select the **Enable Email** check box.
4. Select **Use default email settings** to use the default alerting settings for email, or select **Use custom email settings** and perform the following actions as needed:
   a. In the **From** box, type a return email address, or select variables for the email address from the **Add placeholder** list.
   b. In the **To** box, type each email address that you want to send alert notifications to, or select variables for the email address from the **Add placeholder** list.
   c. In the **Cc** box, type each email address that you want to send alert notifications to, or select variables for the email address from the **Add placeholder** list.
   d. In the **Bcc** box, type the email address of each undisclosed recipient that you want to send alert notifications to, or select variables for the email address from the **Add placeholder** list.
   e. In the **Subject** box, type the subject of the alert notification, or select variables for the subject from the **Add placeholder** list.
   f. In the **Message** box, type the message for the body of the alert notification, or select variables for the message from the **Add placeholder** list.
   g. Select the **Add Attachment** check box to add an attachment to the alert notification.
   h. Under **File Name**, select **Use Automatically Generated Name** or **Use Specific Name**. If you select **Use Specific Name**, type a file name or select a placeholder in the list.
   i. Select the **Add File Extension** check box to automatically a file extension to file names.

      Caution:
      If you do not add a file extension to a file name, the document cannot be opened.
5. Click **Save & Close**.

Working with applications

12.1 Working with applications in BI launch pad

BI launch pad is an integration point between the repository and the following SAP BusinessObjects applications:

- Analysis edition for OLAP
- BEx Web
- BI workspaces
- Crystal Reports for Enterprise
- Web Intelligence

In BI launch pad, you can start an application and then create, view, and edit corresponding objects and save your changes or new objects directly to the repository.

The applications available and the tasks you can perform in them are determined by your access rights, which your system administrator assigns.

12.2 To start an application in BI launch pad

Perform either of the following actions to start in application in BI launch pad:

- On the **Home** tab, click the application in the **My Applications** module.
- On the header panel, from the **Applications** menu, select the application.

  The application you selected opens in a new window.

12.3 BEx web applications in BI launch pad

You can use BEx web applications in the Business Explorer (BEx) of NetWeaver Business Warehouse (BW) for data analysis, reporting, and analytical tasks.

BEx is the SAP NetWeaver Business Intelligence suite. It provides flexible reporting and query, reporting, and analysis tools for strategic analyses and decision-making support in a business. As an employee

with access authorization, you can use BEx web applications to evaluate historical or current data at various levels of detail and from different perspectives, on the web and in Microsoft Excel. You can access data from the SAP NetWeaver portal or from BI launch pad in BI platform.

Before you can open BEx web applications in BI launch pad, your system administrator must configure a BI platform server and a connection to a BW system. Authors of BEx web applications format data from SAP NetWeaver BW in the BEx Web Application Designer, using web items (analysis, filter pane, chart, map, document, and so on). Once the BI platform server and connection to a BW system are configured, you can open BEx web applications in BI launch pad, navigate the data, and save the navigational state of BEx web applications as bookmarks in your browser favorites.

For information about BEx web application features, go to the SAP Help Portal at http://help.sap.com, and select **SAP NetWeaver** > **SAP NetWeaver 7.3**.

12.3.1 To access BEx web applications in BI launch pad

1. Log on to BI launch pad.
2. To access BEx web applications, perform one of the following actions:
   - On the **Home** tab, click **BEx Web Applications** in the **My Applications** module.
   -
   - On the header panel, click **Applications** > **BEx Web Applications**.
3. Log on to the NetWeaver Business Warehouse (BW) system.
4. In the "Open" dialog box, select a BEx web template.

   Note:
   You can select only BEx web templates with data sources that are stored in the BW master system. Your system administrator defines which BW system is configured as the BW master system in BI platform.

The BEx Web application opens, and you can navigate data in it.

Note:
You can use information broadcasting only in BEx web applications that run in a SAP NetWeaver landscape (not in BI launch pad or BI platform). Information broadcasting requires SAP NetWeaver components, such as the Enterprise Portal and Knowledge Management.

12.3.2 To save BEx web applications as bookmarks

Before you start to create a bookmark, choose which BEx navigational state to bookmark for later use. To decide, on a BEx tab in BI launch pad, navigate to the data and select a navigational state.

1. In the context menu for the BEx web application, select **Distribute and Export** > **Bookmark**.

Note:
Depending on the BEx configuration, the **Bookmark** command is available in the context menu or as a button.

2. Save the BEx web application in a folder in your browser favorites.

You can access the BEx bookmark in your favorites later or send it as a link to other users. (You must log on to the BW system to access the bookmark again.) For information about BEx Web Application Designer, web items, and web design API commands, go to the SAP Help Portal at http://help.sap.com, and click **SAP NetWeaver**.

Using discussions

13.1 Working with discussions

Note:
Discussions are disabled by default. Before you can use discussions, your system administrator must enable discussions for BI launch pad and assign view rights to objects and associated notes that you can view. For more information, contact your system administrator.

You can use discussions to post notes to other BI platform users about reports, hyperlinks, programs, and BI platform objects. You can add notes or create a discussion thread for any object you can access. Related notes are organized in a hierarchy.

Users with appropriate access rights can view your notes and add comments to a discussion thread.

13.1.1 To open the Discussions drawer

Discussions notes and threads for each object are located in the **Discussions** drawer on the details panel.

1. On the **Documents** tab, select an object, and click **<** on the details panel.
   The details panel opens.
2. Expand the **Discussions** drawer.
   The drawer displays all notes and threads for the object you selected.

13.1.2 To add a note

In order to add notes to an object, you must have the appropriate access rights for the object.

1. Open discussions.
2. Click .
3. In the **Subject** box, type the subject of the note.

The maximum length of the subject is 255 characters.

4. In the **Message** box, type the body text of the note.
   The maximum length of the message is 1000 characters.
5. (Optional) Click to flag the note as very important or to flag the note as less important.
6. Click **Post**.

13.1.3 To edit a note

You can edit the notes that you create. However, you cannot edit notes created by other users or that have replies in a discussion thread, unless you have administrative rights.

1. Open discussions.
2. Locate and select the note that you want to edit.
3. In the **Subject** box, edit the subject line of the note as needed.
4. In the **Message** box, edit the body text of the note as needed.
5. Click **Post**.

13.1.4 To reply to a note

Before you can reply to a note, you must have the appropriate access rights for the object.

You can post a reply to an entire group or to the user who posted the note. Notes that you have not read appear in bold.

1. Open discussions.
2. Locate and select the note to reply to.
   Click the plus sign (**+**) to view additional levels of the note's discussion.
3. Click to post a reply that is visible to all users with access rights to view notes associated with the object, or click to post a reply to the user who posted the note.
4. In the **Subject** box, edit the subject line of the note as needed.
5. In the **Message** box, edit the body text of the note as needed.
6. Click **Post**.

13.1.5 To delete a note

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

1. Open discussions.
2. Locate and select the note to delete.
3. Click ✕ .
   The note is deleted.

More Information

Information Resource	Location
SAP BusinessObjects product information	http://www.sap.com
SAP Help Portal	Navigate to http://help.sap.com/businessobjects and on the "SAP BusinessObjects Overview" side panel click **All Products**. You can access the most up-to-date documentation covering all SAP BusinessObjects products and their deployment at the SAP Help Portal. You can download PDF versions or installable HTML libraries. Certain guides are stored on the SAP Service Marketplace and are not available from the SAP Help Portal. These guides are listed on the Help Portal accompanied by a link to the SAP Service Marketplace. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
SAP Service Marketplace	http://service.sap.com/bosap-support > Documentation • Installation guides: https://service.sap.com/bosap-instguides • Release notes: http://service.sap.com/releasenotes The SAP Service Marketplace stores certain installation guides, upgrade and migration guides, deployment guides, release notes and Supported Platforms documents. Customers with a maintenance agreement have an authorized user ID to access this site. Contact your customer support representative to obtain an ID. If you are redirected to the SAP Service Marketplace from the SAP Help Portal, use the menu in the navigation pane on the left to locate the category containing the documentation you want to access.
Docupedia	https://cw.sdn.sap.com/cw/community/docupedia Docupedia provides additional documentation resources, a collaborative authoring environment, and an interactive feedback channel.
Developer resources	https://boc.sdn.sap.com/ https://www.sdn.sap.com/irj/sdn/businessobjects-sdklibrary

Information Resource	Location
SAP BusinessObjects articles on the SAP Community Network	https://www.sdn.sap.com/irj/boc/businessobjects-articles These articles were formerly known as technical papers.
Notes	https://service.sap.com/notes These notes were formerly known as Knowledge Base articles.
Forums on the SAP Community Network	https://www.sdn.sap.com/irj/scn/forums
Training	http://www.sap.com/services/education From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style.
Online customer support	http://service.sap.com/bosap-support The SAP Support Portal contains information about Customer Support programs and services. It also has links to a wide range of technical information and downloads. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
Consulting	http://www.sap.com/services/bysubject/businessobjectsconsulting Consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in topics such as relational and multidimensional databases, connectivity, database design tools, and customized embedding technology.

Index

A

access rights
- collaboration 107
- Comment on documents 107
- Comment on documents the user owns 107
- SAP Jam 107
- SAP StreamWork 107
- View comments on documents 107
- View comments on documents the user owns 107

account settings 23
- password 24

ActiveX 38
Adaptive Job Server 181
add placeholders
- personalized values 127

agnostic objects 59
agnostic source documents
- replacing 52

alert notifications
- comparison to alerting 184
- viewing 189

alert settings
- managing for alert sources 192

alert source
- custom alerting settings for 192

alerting 183
- alert sources 184
- comparison to alert notifications 184
- Crystal reports 191
- events 191
- excluding users from 191
- rights required 186
- source objects 188
- subscribing other users to 191
- unsubscribing from 190
- workflow 185

alerts
- Crystal reports 191
- events 191
- excluding users from 191
- subscribing other users 191
- subscribing to 190
- unsubscribing from 190
- viewing in Crystal reports 42

Analysis edition for OLAP 27
Analysis view 59
applications
- starting 193

applications available 193
audit notification 169

B

BEx navigational states
- bookmarking 194

BEx web applications 193
- accessing 194

BI Analyst license 13
BI Inbox
- scheduling to 79, 86

BI launch pad 11
- accessing 21
- creating publications in 140
- preferences 23
- publication results, viewing 173

BI platform 11
BI Viewer license 13
BI workspaces 59
BI workspaces, preferences 26
bookmarking
- BEx navigational states 194

Business Explorer web applications
- accessing 194

Business Intelligence launch pad 11
Business Intelligence platform 11

C

caching, while scheduling 96
categories 64
- corporate, personal 66
- deleting 56
- properties 65

CMC
- publication results, viewing 173

CMC tasks
- alerting workflow, Crystal reports 185
- alerting workflow, events 185
- creating publications 140
- email notification for jobs 168
- subscribing to publications 172
- unsubscribing from publications 172

collaboration
- column 103
- custom home tab 103

collaboration *(continued)*
- destination 103
- displaying a custom home page 107
- drawer 103
- drawer options 105
- feed panel 103
- Follow 103
- follow button 105
- icons 104
- overview 103
- Post button 105
- refresh button 105
- Say something box 105
- Schedule menu 103
- scheduling for 86
- scheduling to 79
- Send menu 103
- Unfollow 103
- unfollow button 105

collaboration rights
- Comment on documents 107
- Comment on documents the user owns 107
- View comments on documents 107
- View comments on documents the user owns 107

concurrent user license 13
copying objects 54
corporate categories 66
Crystal reports 59
- alert notifications 184
- alerts 42
- database logon, configuring 163
- delivery rules 117, 161
- drilling 42
- dynamic recipient sources, troubleshooting 180
- exporting 44
- formats
  - specifying 152
- formatting options 153
- PDF file merging
  - formatting 162
- PDF merging 133
- personalizing
  - with local profile targets 151
  - with parameters 150, 151
- preferences 25
- printing 43, 160
- publishing formats 128

Crystal reports *(continued)*
SAP Crystal Reports viewer 2011 40
scheduling 67
scheduling formats 74
troubleshooting 179
viewers 35
viewing 35
Crystal Reports viewer 2011
installing 41
CSV, scheduling formats 74
custom alert settings 192
custom home page
collaboration 107
SAP Jam 107
SAP StreamWork 107
customized home tab 15

D

Dashboard and Xcelsius objects 59
data refresh 116, 179
static source documents 52
database
logon, Crystal reports 163
database fetches 116, 170
database logon, specifying 71
Default Enterprise Location, scheduling to 86
delivery rules
Crystal reports 117
global 161
recipient 161
destinations
email 149
placeholders 144
publication names 127
publications 120, 145
scheduling 86
selecting 144
sending to 55
destinations, scheduling
locations 80, 120
Details button 20
details panel 16
closing 21
Discussions drawer 18, 19
drawers 18
hiding 21
opening 20
overview 19
resizing 20
SAP Jam drawer 18
SAP StreamWork drawer 18, 19
showing 20
Summary drawer 18, 19
discussions 59
adding notes 197
deleting notes 199
details panel 197
editing notes 198
feed panel 197
opening 197
replying to notes 198
Discussions drawer
opening 197
document feeds
comments on 110
feed panel 105
following 110
following from a new tab 109
following from OpenDocument link 110
how to use 108
joining 110
posting to 110
stop following 111
stop following from an OpenDocument link 111
subscribing from a new tab 109
subscribing from OpenDocument link 110
subscribing to 110
unsubscribing from 111
unsubscribing from an OpenDocument link 111
who can see 105
documents
uploading to BI launch pad 52
Documents tab 16
Collaboration column 103
list panel 19
navigation panel 18
panel, navigation 18
toolbar 17
drawers 16, 18
drill modes 49
drilling
Crystal reports 42
Web Intelligence documents 49
drilling on data
drill options 29, 30
dynamic recipients 119
adding 143
sources 119
troubleshooting 180

E

editing 42
email
embedding publication content in 149
notification 168
publication instances, troubleshooting 181
scheduling to 79, 86
emailing publications
using personalized placeholders 127
Enterprise recipients, adding 142
events 59, 95
publications 169
Excel files 59
Excel, scheduling formats 74
export format options 44
exporting Crystal reports 44
external recipients 119

F

failed publications, retrying 176
feed panel 105, 108
Collaboration drawer 105, 106
displaying 106
follow button 105
opening 106
Post button 105
refresh button 105
refreshing 108
resizing 20, 107
Say something box 105
unfollow button 105
feeds
accessing 106
Collaboration drawer 106
comments on 110
feed panel 105, 106
following 110
following from a new tab 109
following from OpenDocument link 110
how to use 108
joining 110
posting to 110
refreshing 108
SAP StreamWork drawer 105
stop following 111
stop following from an OpenDocument link 111
subscribing from a new tab 109
subscribing from OpenDocument link 110
subscribing to 110
unsubscribing from 111

feeds *(continued)*
unsubscribing from an OpenDocument link 111
who can see 105
file location, scheduling to 86
file system, scheduling to 86
file types 59
files 51
filtering 53
searching 57
sorting 53
viewing 33
filtering
objects 53
publication data 131
filters
removing 54
filters, scheduling with 93
Flash objects 59
folders 64
adding objects to 66
deleting 56
properties 65
folders and categories 65
formats 164
Crystal reports 152
mHTML 149
publications 128
Web Intelligence documents 164
formatting options
Crystal reports 153
FTP destination
scheduling to 79
FTP server
scheduling to 86

G

global delivery rules 161
global profile targets 165
group selection formula 93
group tree
opening 37

H

head panel 16
header panel 15, 21
high-volume publications 116, 177
Home tab 15
hyperlinks 59
creating 57

I

icons
collaboration 104
SAP Jam 104
SAP StreamWork 104
instance feeds
comments on 110
feed panel 105
following 110
following from a new tab 109
following from OpenDocument link 110
how to use 108
joining 110
posting to 110
stop following 111
stop following from an OpenDocument link 111
subscribing from a new tab 109
subscribing from OpenDocument link 110
subscribing to 110
unsubscribing from 111
unsubscribing from an OpenDocument link 111
who can see 105
instances 99
assigning a title 68
Crystal report formats 72
in formats 128
output format 71
output formats 72
overview 99
pausing 97
redistributing 176
resuming 97, 98
sending 55
viewing 99
viewing, older 34
Web Intelligence formats 72

J

Java viewer 39
Java Virtual Machine 39

K

keywords 54

L

licenses
BI Analyst 13
licenses *(continued)*
BI Viewer 13
concurrent user 13
named user 13
Lifecycle management console jobs 59
list panel 16, 19
local disk
scheduling to 79
local profile targets
Crystal reports 151
Web Intelligence documents 165
locales 25
logging on 21

M

merged PDF files, formatting 162
metadata 59
mHTML 149
multiple profile values 139
My Applications 15
My Recently Run Documents 15
My Recently Viewed Documents 15

N

named user license 13
navigation map 48
navigation panel 16, 18
Categories drawer 18
drawers 18
Folders drawer 18
My Documents drawer 18
Search drawer 18
new objects 51
no personalization 131

O

object packages 59, 98
objects 51
adding to BI launch pad 52
assigning
to categories 66
to folders 66
copying 54
creating 51
deleting 56
filtering 53
formatting 72
refreshing 34
scheduling 67
searching 57, 63
sending 55

objects *(continued)*
sorting 53
viewing 33
objects in BI platform
discussions 197
notes 197
OpenDocument
opening details panel from 20
OpenDocument links
creating 56
SAP StreamWork feeds 110
viewing SAP Streamwork comments via 109
opening details panel 20

P

parameters
Crystal reports 150, 151
scheduling 95
parameters, report 42
password, changing 24
paused instance
resuming 98
pausing
instances 97
pausing instances 97
PDF
merging 133
scheduling formats 74
PDF files 59
performance, publication, improving 177
personal categories 66
personalization 131
personalized placeholders 127
personalizing
Crystal reports 150, 151
publications 131
Web Intelligence documents 165
placeholder 127, 131
placeholders 149
plain text, scheduling formats 74
platform search 61, 63
PowerPoint files 59
preferences 23
Analysis edition for OLAP 27
BI workspaces 26
Crystal reports 25
general 23
locales 25
password 24
time zones 25
preferred viewing locale 25
printing
Crystal report publications 160
printing *(continued)*
reports 43
scheduling settings 94
Processing Server 179
profiles 59
profile resolution 170
program objects 59
prompts
scheduling 95
prompts in Web Intelligence documents 166
properties 54
publication extensions 132, 167
publication files
personalizing publications for 127
publication instances, redistributing 176
publication names
personalization 127
placeholders 149
placeholder 127
publication source documents
personalized placeholders 149
publications 59, 115
additional options 167
creating
in BI launch pad 140
in CMC 140
delivery rules 117
designing 139
destinations 120, 145
dynamic recipients 119, 143
embedding content in email 149
Enterprise recipients, adding 142
file types for documents in 128
finalizing 171
for SAP BusinessObjects Live Office 139
formats 128
general properties 141
general properties for 140
opening 141
personalization 131
personalizing names 127
placeholder 131
publication extensions 132
redistributing instances 176
report bursting 116
running 146
scheduling 68, 146, 172
source documents for 140
source documents, adding 141
subscribing to 132, 172
testing 171
unsubscribing from 132, 172
viewing results 173
publisher 137
publishing 115
access rights 133
rights 137
Publishing
SAP integration 139
PVL 25

Q

queries 59

R

recipients
delivery rules 161
dynamic 119
personalizing publications for 131
redistributing instances to 176
record selection formula 93
recurrence pattern options 69, 146
recurrence patterns 146
assigning to objects 68
calendars 68
parameters
run time 68
scheduling 68
recurring instance
following 110
refreshing
objects 34
source document data 116, 179
static source document data 52
Report Application Server 180
report bursting 170
agnostic source documents 52, 116
Crystal reports 116
logon credentials 116
security 116
static source documents 52, 116
Web Intelligence documents 116
report tabs, publishing 164
report viewers
Crystal reports 25
SAP Crystal Reports viewer 2011 40
Web 36
web ActiveX viewer 38
web Java 39
web Java viewer 39
web viewer 36
reports
uploading to BI launch pad 52
resuming instances 97
rich text, scheduling formats 74

rights
collaboration 107
Comment on documents 107
Comment on documents the user owns 107
publishing 133, 137
SAP Jam 107
SAP StreamWork 107
View comments on documents 107
View comments on documents the user owns 107
rights, alerting
Edit 186
Schedule 186
Subscribe 186
Trigger 186
View 186
View Instance 186
RTF files 59

S

SAP BusinessObjects Live Office 139
SAP Jam
custom home tab 103
displaying a custom home page 107
drawer options 105
follow button 105
icons 104
overview 103
Post button 105
refresh button 105
SAP Jam tab 103
Say something box 105
scheduling to 79
unfollow button 105
SAP Jam rights
Comment on documents 107
Comment on documents the user owns 107
View comments on documents 107
View comments on documents the user owns 107
SAP StreamWork
column 103
column, hiding 105
column, showing 104
Comment on document right 110
Comment on documents the user owns right 110
Crystal reports 111, 112
custom home tab 103
destination 103
displaying a custom home page 107
SAP StreamWork *(continued)*
document feeds 108
drawer 103
drawer options 105
feed panel 103
feeds 108, 110
Follow 103
follow button 105
following a feed for an instance 108
how to use 108
icons 104
instance feeds 108
overview 103
PDF files 111, 112
Post button 105
refresh button 105
SAP StreamWork tab 103
Say something box 105
Schedule menu 103
scheduling documents 111
scheduling to 79, 86
Send menu 103
sending documents 112
Unfollow 103
unfollow button 105
View comments on documents 110
View comments on documents the user owns 110
viewing comments via OpenDocument link 109
viewing comments for an instance 108
viewing on a new tab 108
Web Intelligence documents 111, 112
SAP StreamWork column
icons 108
SAP StreamWork drawer 105
SAP StreamWork rights
Comment on documents 107
Comment on documents the user owns 107
View comments on documents 107
View comments on documents the user owns 107
scheduling 67
caching 96
database logon 71
destination locations 79
events 95
filters 93
formats 74
formats, instances 71
objects 67
parameters 95
prompts 95
scheduling *(continued)*
publications 68, 146, 172
selection formulas 93
server groups 169
settings
print 94
server group 96
with events 169
scheduling options
Web Intelligence documents 99
search
content 63
features 57
mixed language 57
objects 57
ranking 57
techniques 61
Search drawer 57
search for
agnostic objects 59
Analysis view 59
BI workspaces 59
Crystal reports 59
Dashboard and Xcelsius objects 59
discussions 59
events 59
Excel files 59
file types 59
Flash objects 59
hyperlinks 59
Lifecycle management console jobs 59
metadata 59
object packages 59
PDF files 59
PowerPoint files 59
profiles 59
program objects 59
publications 59
queries 59
RTF files 59
TXT files 59
universes 59
Web Intelligence documents 59
Widgets 59
Word documents 59
workspaces 59
See More button 15
selecting
Enterprise recipients 142
selection formula 93
separated values, scheduling formats 74
server groups 96
server groups, scheduling 169

sorting
    objects 53
sorting data 45
source documents, troubleshooting 179
source objects
    alerting 188
static source documents 116
    replacing 52
subscription 132, 172
Summary dialog box, publications 171

T

tabs 15
    pinning 34
test mode 171
third-party source documents
    replacing 52
time zones 25
toolbar 16
    Details button 17
    More Actions menu 17
    New menu 17
    Organize menu 17
    Send menu 17
    View menu 17
troubleshooting
    dynamic recipient sources 180
    email publication instances 181
    failed publications 176
    publication performance 177
    source documents 179
TXT files 59
TXT, scheduling formats 74

U

universes 28, 59
Unread Alerts 15
Unread Messages in My Inbox 15
user prompts 48

V

viewer
    open in new window 35
viewers 35
viewing 42
viewing reports
    in new window 35

W

web ActiveX viewer 38
Web Intelligence document scheduling options 99
Web Intelligence documents 59
    default universe 28
    drilling 49
    drilling on data 29, 30
    Excel formats 31
    Filter Bar 46
    formats, specifying 164
    formatting locales 28
Web Intelligence documents *(continued)*
    modification interface 28
    navigation map 48
    personalization 165
    preferences 27
    publishing formats 128
    PVL 28
    reading interfaces 27
    Report Filter toolbar 46
    scheduling 67
    toolbar 46
    troubleshooting 179
    user prompts 48
    viewing 46
    viewing locales 28
    viewing preferences 27
web Java viewer
    Java viewer 39
    toolbar 39
web viewer
    toolbar 36
Web viewer 36
Widgets 59
Word documents 59
Word, scheduling formats 74
workflows
    alerting 185
workspaces 59

X

XML, scheduling formats 74