PUBLIC

SAP BusinessObjects Integration Option for Microsoft SharePoint Software

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Integration Option for Microsoft SharePoint Getting Started Guide

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1 Document History

Version	Date	Description
SAP BusinessObjects Business Intelligence Platform 4.3	June, 2020	For Integration Option for Microsoft SharePoint, certain content webparts are deprecated. The deprecated viewers are: IOMS-Analytical Report Viewer IOMS-Crystal Report Viewer IOMS-Xcelsius Viewer

2 Who should read this information

This guide is intended for business users who use web parts in the integration option for Microsoft SharePoint software to work with objects.

Before using the integration option for SharePoint, business users should be familiar with Microsoft SharePoint 2016, SharePoint 2013, or SharePoint 2010 and with the following applications:

- SharePoint Foundation 2010 with SharePoint Server 2010, Windows SharePoint Services (WSS) 3.0 with Microsoft Office SharePoint Server (MOSS) 2007, or WSS 2.0 with SharePoint Portal Server 2003
- SAP BusinessObjects Business Intelligence (BI) platform

3 Getting started

3.1 Overview of the integration option for SharePoint

The integration option for SharePoint software enables Business Intelligence (BI) solutions to work with the SharePoint software. The integration option is available as a free download.

Administrators deploy the integration option for SharePoint to a site and then use the Team Site template to create a dedicated site for accessing BI content.

The integration option for SharePoint provides a gallery of SAP BusinessObjects web parts, that users with administrative rights can configure for SharePoint sites. In this way, any SharePoint site can be enabled to access and to manage BI content objects, including Crystal reports, Web Intelligence documents, publications, Xcelsius reports, Advanced Analysis documents, PDF documents, Microsoft Excel spreadsheets, Microsoft Word files, program files, object packages, and other reports.

When there is an existing site available with the deprecated webparts, the expected behavior is:

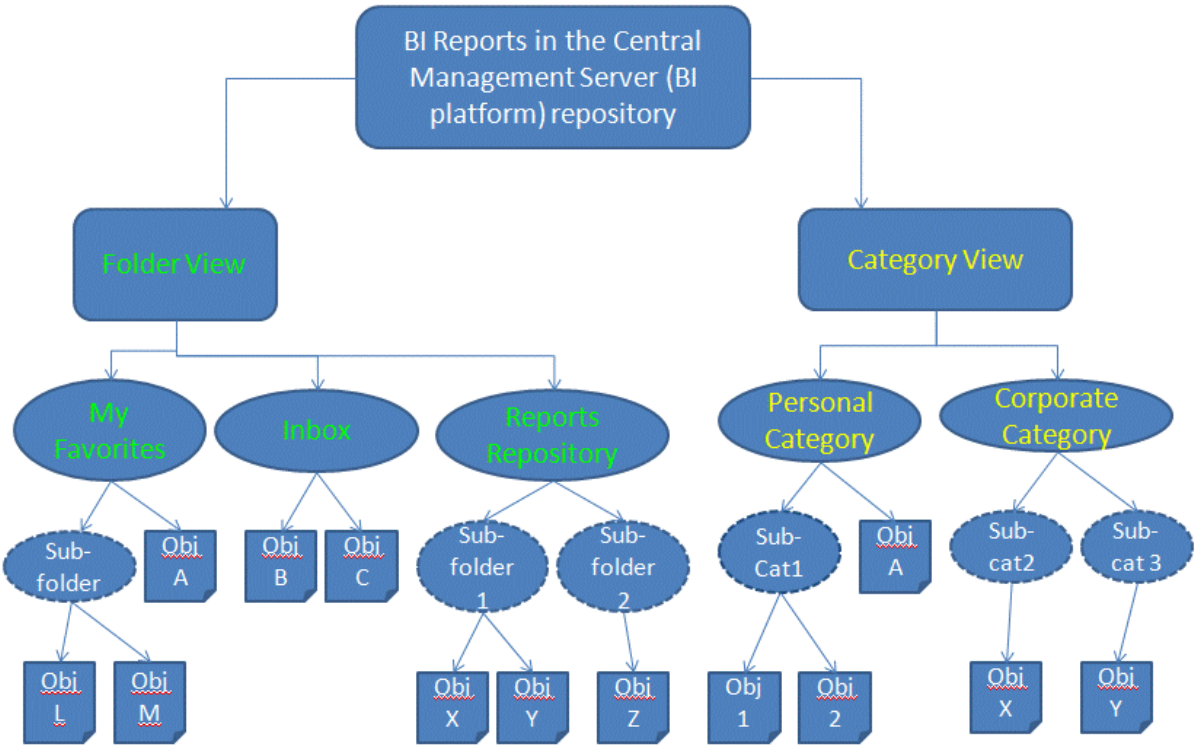
1. The deprecated webparts are listed in the Webparts gallery of an existing site (the site created before upgrading from BI 4.2 to BI 4.3). If you use the deprecated webparts in the site, errors/exceptions are seen.
2. If an existing site has deprecated webparts, after an upgrade, the webparts will not function and throw errors when the site is opened for viewing.

It is recommended to create a new site after an upgrade from BI 4.2 to BI 4.3.

> **Note**
>
> You can now access any report in the Integration of Microsoft sharepoint (IOMS) document viewer.
>
> For Integration Option for Microsoft SharePoint, certain content specific webparts are deprecated. The deprecated viewers are:
>
> - IOMS-Analytical Report Viewer
> - IOMS-Crystal Report Viewer
> - IOMS-Xcelsius Viewer

3.2 Object organization in the BI platform repository

The following illustration shows how objects are organized in the Business Intelligence (BI) platform repository:



The `All` folder is the root folder that contains all content in the BI platform repository. The root folder has two views—folder (the default view) and category. Files appear in only one view (that is, files in one view do not appear in the other view).

For example, in the illustration, Obj X and Obj Y in the `Reports Repository` folder are in the folder view but have subcategories of the `Corporate Category` folder are assigned to them. Therefore, Obj X and Obj Y appear in both views. Obj Z in the `Reports Repository` folder does not have a category assigned and, therefore, does not appear in the category view.

Folder view (default)

Folder	Description
`My Favorites`	Displays a personalized list of objects
`Inbox`	Displays objects sent to you by other BI users, objects that you sent to other users, and shared objects. The `Inbox` folder does not include categories or subfolders.

Folder	Description
`Reports Repository`	Contains all objects in the BI platform repository that you can access. You can add objects only to subfolders of the `Reports Repository` folder.

Category view

Category	Description
Personal	Use for objects containing personal or confidential information. After you assign a report to the *Personal* category or a subcategory of it, the report is available under *Personal* in the category view.
Corporate	Use for objects containing information that is available to all corporate business users. You can add objects only to subcategories of the *Corporate* category. After you assign a report to a subcategory of *Corporate*, the report is available under *Corporate* in the category view.

3.3 Tasks you can perform on BI content

Task	Description
Navigate documents	The IOMS-Content Explorer web part enables navigation of folders and access to Business Intelligence (BI) platform reports in the Central Management Server (CMS) repository. If your software administrator created your site with the SAP BusinessObjects Site Definition template, the IOMS-Content Explorer web part appears in the `My Favorites` folder on the home page, in the BI Inbox, and in the Reports Repository on the site.

Task	Description
View documents	Double-click a document title to view the document. The integration option for SharePoint displays the selected document in the appropriate viewer web part. You can view the following types of content: • Web Intelligence documents • Crystal reports • Xcelsius documents • Object packages • Analysis, edition for OLAP, documents (In earlier versions, the product was named Advanced Analysis or Voyager.) • Third-party documents, such as Microsoft Word, Microsoft Excel, or PDF
Search for documents	Search the content of objects managed by the BI platform that reside in the SharePoint repository or in the BI platform repository. Search results include documents from both repositories that match the search criteria. You can select an object type in the search results and perform actions on the object—for example, viewing or scheduling.
Schedule objects and instances	Scheduling an object generates a report on the object, which provides the most current information for viewing, printing, and distributing. Each time the object runs, a report instance is created that reflects data retrieved from the universe at that point in time. You can view the history of a scheduled object to display a list of all existing instances.
Manage preferences	Preference values manage the following features: • BI report display • Object-type viewing • Web page display language • Date, time, and number formatting conventions • Web-page time zone (Activities such as scheduling depend on the time zone you select.)
Publish	Publishing a report makes its instances available to users. You can publish documents to multiple formats and destinations, and you can tailor documents for specific recipients with customized processing extensions, dynamic recipients, and delivery rules. For example, schedule a publication to run at specified intervals and send it to multiple destinations, including recipient BI Inboxes and email addresses.

Task	Description
Share information	Share reports with other BI platform users by emailing a report or sending a document link via FTP, to a BI Inbox, or to a file location.
Collaborate with other business users	Post comments about a report or an object in a note that is associated with the object. Other BI platform users can view your comments and reply to them.

3.4 Logging on to the integration option for SharePoint

You must log on to the integration option for SharePoint software before you can access Business Intelligence (BI) content in the Central Management Server (CMS) repository in the BI platform.

Before logging on to the integration option for SharePoint:

- Confirm that a valid browser is installed on your machine—either Microsoft Internet Explorer version 7, 8, or 9 or Mozilla Firefox version 3.5 or 4.0.
- Add the SAP BusinessObjects site URL to your trusted sites in Microsoft Internet Explorer (*Tools* > *Internet Options* > *Security* tab).

1. In a web browser, enter the URL for the integration option for SharePoint site created by your administrator.

   Ask your administrator if you do not know the URL.

   If your administrator configured single sign-on (SSO) for your deployment, you are automatically logged on and the home page of your SAP BusinessObjects site appears instead of the logon dialog box.
2. In the *SAP BusinessObjects Log On* dialog box, in the *System* box, enter the IP address and the port of the CMS running the BI platform.

   If your administrator configured the CMS name in the integration option for SharePoint software, it appears by default in the *System* box. If necessary, you can enter a different IP address and port.

   For example, enter **`10.193.4.165:6400`**
3. In the *User Name* box and the *Password* box, enter your credentials.
4. In the *Authentication* list, select the authentication type that your administrator configured for the site:

Option	Description
Enterprise	(Default) Enterprise authentication requires a user name and a password that the BI platform recognizes.
LDAP	LDAP authentication requires a user name and a password that an LDAP directory server recognizes. This authentication type is available only if your administrator configured it.

Option	Description
Windows AD	Windows AD authentication requires a user name and a password that Windows AD recognizes. This authentication type is available only if your administrator configured it.

The *Authentication* box is available only if your administrator configured the software for authentication.

5. Click *Log On*.

The home page of the SAP BusinessObjects Site Definition template appears, displaying embedded web parts.

3.5 Logging off the BI platform

After you finish working with Business Intelligence (BI) platform content, you must log off the platform to end the session.

Click `<YourLogonName>`, and select *My SAP BusinessObjects Log Off*.

You are disconnected from the Central Management Server (CMS) in the BI platform.

4 Creating and modifying SharePoint sites

4.1 SAP BusinessObjects web parts

A web part is a modular unit of information that enables content viewing on a web page. You use web parts to customize the content, appearance, and behavior of web pages on SharePoint sites.

The integration option for SharePoint includes nine SAP BusinessObjects web parts in addition to SharePoint web parts. SAP BusinessObjects web parts can be configured for a SharePoint site, and SharePoint web parts can be configured for the SAP BusinessObjects Site Definition template.

Users with administrator rights can add web parts to SharePoint site pages. For example, you can add web parts to a site to enable the following actions:

- Set properties
- Store and track documents
- View content from multiple sources
- View business data
- Share business reports
- View information in existing lists and libraries on a SharePoint site

You mut add the following web parts to a SharePoint site in order to access, view, organize, and work with Business Intelligence (BI) objects:

Web part	Description
IOMS-Advertisement	Displays a product advertisement, including a banner with a corporate image, text, and links
(Required) IOMS-Content Explorer	Enables document browsing, folder and category navigation, and access to content in the Central Management Server (CMS) in the BI platform. If a site was created using the SAP BusinessObjects Site Definition template, this web part appears as *My Favorites* on the home page, as *Inbox* on the Inbox page, and as *Reports Repository* on the Reports Repository page of the site.
IOMS-Recently Viewed	Displays the last five documents viewed on the SAP BusinessObjects site. Click a document to open it in the default viewer for the document type.
IOMS-Recent Searches	Displays the last five searches performed on the SAP BusinessObjects site. Click a search to display its results in the IOMS-Display Search Results web part.

Web part	Description
IOMS-Display Search Results	Displays search results from the SAP BusinessObjects site search, which locates documents and reports in the Central Management Server (CMS) repository in the BI platform.
IOMS-Document Viewer	Enables viewing of third-party documents such as Word, Excel, PDF, and so on, on a SharePoint site. For example, when you open a PDF file, Adobe Acrobat Reader opens in the IOMS-Document Viewer web part. If your administrator configured this web part as the primary viewer for the site, by default, all third-party documents open in this web part. If this web part is not configured as the primary viewer, third-party documents open in a new browser window.

4.1.1 IOMS-Content Explorer

The IOMS-Content Explorer web part includes the following components:

- List panel, where objects from the Business Intelligence (BI) platform appear
- Toolbar—or (SharePoint 2016, SharePoint 2013, and SharePoint 2010) *SAP BusinessObjects* menu

List panel

Columns on the list panel display properties for objects in the BI platform repository. The columns are automatically inserted by the SAP BusinessObjects Site Definition template, but you can customize a column by modifying properties of the web part.

Columns in the list panel	Description
Type	Icon representing the document type
Title	Name of a file or document
Last Run	If an object can be scheduled, the time-stamp when it last ran
Owner	Document owner
Instances	Number of times an object was scheduled, regardless of success or failure
Type Description	Document format, such as PDF or Word

Toolbar

If required, you can add the IOMS-Content Explorer toolbar to SharePoint by modifying properties of the web part. To perform an action on an object, select the check box beside it and click a toolbar button.

Toolbar button	Description
New	Creates a new object—for example, a hyperlink, a publication, a Web Intelligence document, or a folder
Upload	Uploads a new file, such as a local document, to a location in the directory structure
Actions	Performs an action on an object—for example, *Organize* (cut, copy, paste, delete, create a shortcut, and so on), *Send*, *View Properties*, *Assign Categories*, *Schedule*, or *Discuss*
Show	Toggles between *Folder View (default)* or *Category View*

The view mode list appears by default on the IOMS-Content Explorer toolbar, unless you toggle it off.

(SharePoint 2016, SharePoint 2013, and SharePoint 2010) SAP BusinessObjects menu

For SharePoint 2016, SharePoint 2013, and SharePoint 2010, the integration option for SharePoint includes an *SAP BusinessObjects* menu instead of a toolbar. The same buttons are available on the menu and the toolbar.

4.1.1.1 IOMS-Content Explorer properties

IOMS-Content Explorer properties apply only to the page for which they are set (not to all pages on the site).

IOMS-Content Explorer property	Description
Display Columns	Select the check box for a column to display it in the IOMS-Content Explorer web part. The columns available depend on the current page or view. Other columns (even if selected) are ignored if they do not apply to the view. • On the *My Favorites* page, you can display the *File Description*, *Instances*, *Last Run*, *Owner*, and *Type Description* columns. • On the *Report Repository* page, you can display the *File Description*, *Instances*, *Last Run*, *Owner*, and *Type Description* columns. • On the *Inbox* page, you can display the *File Description*, *From*, *Last Run*, *Owner*, *Sent* , and *Type Description* columns. The *Document Navigation Preference* property does not apply to the *Inbox* page.
Document Navigation Preference	Select *Show (Select View)* or *Do not show* to display or hide the *Show* list on the IOMS-Content Explorer toolbar. Use the list to toggle between the folder view and the category view of the list panel. *Show (Select View)* is the default setting.
Rows per page	Enter a number from 1 to 15 to indicate the default number of rows per page to display in the IOMS-Content Explorer web part. Modify the default number if you want more rows to display in the web part.
Start Folder	Enter the folder for which to display content in the IOMS-Content Explorer web part each time you go to that page. Other files and folders do not appear.
Show Toolbar	(SharePoint 2016, SharePoint 2013, and SharePoint 2010) Select the check box to display the IOMS-Content Explorer toolbar in addition to the menu.

4.1.1.1.1 IOMS-Content Explorer properties

IOMS-Content Explorer properties apply only to the page for which they are set (not to all pages on the site).

IOMS-Content Explorer property	Description
Display Columns	Select the check box for a column to display it in the IOMS-Content Explorer web part. The columns available depend on the current page or view. Other columns (even if selected) are ignored if they do not apply to the view. • On the *My Favorites* page, you can display the *File Description*, *Instances*, *Last Run*, *Owner*, and *Type Description* columns. • On the *Report Repository* page, you can display the *File Description*, *Instances*, *Last Run*, *Owner*, and *Type Description* columns. • On the *Inbox* page, you can display the *File Description*, *From*, *Last Run*, *Owner*, *Sent* , and *Type Description* columns. The *Document Navigation Preference* property does not apply to the *Inbox* page.
Document Navigation Preference	Select *Show (Select View)* or *Do not show* to display or hide the *Show* list on the IOMS-Content Explorer toolbar. Use the list to toggle between the folder view and the category view of the list panel. *Show (Select View)* is the default setting.
Rows per page	Enter a number from 1 to 15 to indicate the default number of rows per page to display in the IOMS-Content Explorer web part. Modify the default number if you want more rows to display in the web part.
Start Folder	Enter the folder for which to display content in the IOMS-Content Explorer web part each time you go to that page. Other files and folders do not appear.
Show Toolbar	(SharePoint 2016, SharePoint 2013, and SharePoint 2010) Select the check box to display the IOMS-Content Explorer toolbar in addition to the menu.

4.1.2 IOMS-Display Search Results

When searching an SAP BusinessObjects site in SharePoint, the search engine looks in the Business Intelligence (BI) platform repository and displays results in the IOMS-Display Search Results web part.

Search feature	Description
Results highlight the search term entered	For example, if the search term includes "sales," the word "sales" is highlighted in yellow in each report in the search results.
The file path to a result appears with the result	Click the parent folder of a search result or report to display the *Report Repository* page, where you can access files and folders.
Easy navigation to search results	At the top of each page of search results , the page number appears as *Page* `<x>` *of* `<n>`, where `<x>` is the current page and `<n>` is the total number of pages. Properties for the IOMS-Display Search Results web part determine the number of results that appear per page. When you click a search result, the report opens in a new browser window. You can open and view the report in the default viewer web part (for example, IOMS-Document Viewer). In addition, the report opens on the page containing the first occurrence of the search term. The search engine knows that "XYZ company" appears on page 8 of the report and opens the report to page 8.
Search engine makes suggestions in the following format: `Did you mean #<suggestion>#?`	If you click the suggested term, the search engine looks for that term and updates the search results. If no results for the original term are available but results for the suggested term are available, the search engine uses the suggested term and displays this message: `Did you mean #<suggestion>#? Top <x> of <n> results shown.`

4.1.3 Adding a web part to a SharePoint site

Before you can add web parts to a SharePoint site, you must have administrator rights.

Open the web-part gallery in SharePoint, and select a web part to add.

4.2 SAP BusinessObjects Site Definition template

Your administrator uses the SAP BusinessObjects Site Definition template to create a dedicated site, where you can view, manage, and interact with Business Intelligence (BI) platform content in the SharePoint software.

The SAP BusinessObjects Site Definition template includes web pages, five web parts, and breadcrumbs. Each web page in the template consists of modular units of information called web parts.

SAP BusinessObjects Site Definition template feature		Description
Web pages	Home	Displays the default page that appears after logging on to the site. The page includes a product advertisement, a personalized list of reports, a list of recently viewed documents, and a list of recently searches.
	Inbox	Displays reports shared with you by other users
	Report Repository	Displays all reports to which you have access
	Help	Displays the Integration Option for SharePoint Help
	User Preferences	Displays a page where you can personalize BI platform options for the site
	View Search Results	Displays a page where you can search for content and view search results
	User Actions	Displays a page where you can interact with BI content in the Central Management Server (CMS) repository. For example, you can send files to other users, schedule an object, view object history, set object properties, discuss an object with other users, upload a new document, or create hyperlinks, publications, and Web Intelligence documents.

SAP BusinessObjects Site Definition template feature		Description
Web parts	IOMS-Advertisement	Adds the product advertisement that appears on the home page of the site
	IOMS-Recently Viewed	Adds the *Recently Viewed* list of documents to the home page of the site
	IOMS-Recent Searches	Adds the *Recent Searches* list to the home page of the site
	IOMS-Content Explorer	Adds *My Favorites* to the home page, *Inbox* to the *Inbox* page, and *Reports Repository* to the *Reports Repository* page of the site. This web part enables you to access and to explore content in the BI platform.
	IOMS-Display Search Results	Adds the *View Search Results* page to the site. This web part enables you to view and to perform actions on search results.
Breadcrumbs		Tracks your navigational path on the site. A breadcrumb appears at the top of each web page, except the *Logon* page and the *Help* page.

The home, *Inbox*, *Report Repository*, and *Help* pages appear on the left side of the template. To access other pages in the template, you must perform a specific action.

> **Note**
>
> Do not use the *Back* button in a web browser to navigate sites created with the SAP BusinessObjects Site Definition template.

4.3 Breadcrumbs on SharePoint sites

A breadcrumb displays the navigation path to a web page. Breadcrumbs appear at the top of each page of an SAP BusinessObjects site to help track your location on the site as you browse and perform actions on files and folders.

Breadcrumbs are available on sites created with the SAP BusinessObjects Site Definition template or with the SharePoint Site template and SAP BusinessObjects web parts.

You can jump to any folder or category that appears in a breadcrumb. For example, if you are viewing a report on the *Report Repository* page for which the breadcrumb is `<YourSiteName>` > *All* > *Report Repository* > *Revenues* > *California* > *LA* > *PizzaHut*, you can jump to the `Revenues` folder by clicking *Revenues* in the breadcrumb. The view refreshes and displays the contents of the `Revenues` folder in the IOMS-Content Explorer web part.

4.3.1 SAP BusinessObjects Site Definition template breadcrumbs

Breadcrumb location	Breadcrumb behavior
On pages containing the IOMS-Content Explorer web part	When you click a file or folder in the list panel of the IOMS-Content Explorer web part, the breadcrumb is refreshed and displays the navigation path as `<YourSiteName>` > `<Folder/CategoryPath>`.
On the *User Actions* page	This page appears when you perform the following actions: • Schedule an object • View the history of an object • Set properties for an object • Assign a category to an object • Add a category or a folder • Send an object to an FTP or file location, via an email message, or to an SAP BusinessObjects Inbox The breadcrumb displays the navigation path as `<YourSiteName>` > `<Folder/CategoryPath>` > `<FileName>` > `<YourAction>`. For example, if you schedule a report named "Profits_Q1.Webi" in the `Statistics` folder on the *Report Repository* page of a site named My BusinessObjects, the breadcrumb would be *My BusinessObjects* > *All* > *Report Repository* > *Statistics* > *Profits_Q1* > *Schedule*.

Breadcrumb location	Breadcrumb behavior
When you perform an action on a report or an object on the *Search Results* page	When you perform an action on a search result, the *User actions* page appears. The breadcrumb displays the navigation path as `<YourSiteName>` > *Search Results* > `<FileName>` > `<YourAction>`. For example, if you search for "Sales_Q4_2012," select *Sales_2010.Webi* in the search results, and schedule the report, the *User Actions* page appears. If the name of the site is My Business Portal, the breadcrumb would be *My Business Portal* > *Search Results* > *Sales_2012* > *Schedule*.

These examples assume SharePoint 2016, SharePoint 2013, or SharePoint Server 2010. If you are using SharePoint 2007, the root of the breadcrumb is the home page of the SharePoint web portal, and breadcrumbs display the navigation path as:

- IOMS-Content Explorer web part: `<home>` > `<YourSiteName>` > `<Folder/CategoryPath>`
- *User Actions* page: `<home>` > `<YourSiteName>` > `<Folder/CategoryPath>` > `<FileName>` > `<YourAction>`
- When you perform an action on a report or an object on the *Search Results* page: `<home>` > `<YourSiteName>` > *Search Results* > `<FileName>` > `<YourAction>`

4.3.2 IOMS-Content Explorer breadcrumbs

Use IOMS-Content Explorer breadcrumbs to jump from your current view to any location in the file directory, in a folder view or a category view.

Folder view of breadcrumbs

In the folder view, breadcrumbs appear as `<YourSiteName>` > *All* > `<ChildFolder>` > `<Subfolder>`. When you click *All* in a breadcrumb in the folder view of IOMS-Content Explorer, you can access three folders—`My Favorites`, `Inbox`, and `Reports Repository`.

Parent (root) folder	Child folder	Where content of child folders appears	Example of breadcrumb
`All`	`My Favorites`	Home page of the SAP BusinessObjects Site Definition template	`Profits_FY2013` folder in *My Favorites* on the home page of a site named MyBusinessSite: *MyBusinessSite* > *All* > *My Favorites* > *Profits_FY2013*
`All`	`Inbox`	*Inbox* page of the SAP BusinessObjects Site Definition template. There are no categories or folders in the Inbox.	*Inbox* page on a site named MyBusinessSite: *MyBusinessSite* > *All* > *Inbox*
`All`	`Report Repository`	*Report Repository* page of the SAP BusinessObjects Site Definition template	`Sales_2012_Forecast` folder in IOMS-Content Explorer on the *Reports Repository* page of a site named MyBusinessSite: *MyBusinessSite* > *All* > *Report Repository* > *Sales_2012_Forecast*

Category view of breadcrumbs

In the category view, breadcrumbs appear as *<YourSiteName>* > *All* > *<Corporate/PersonalCategory>* > *<ChildCategory>* > *<Subcategory>*. When you click *All* in a breadcrumb in the category view of IOMS-Content Explorer, you can access two categories—*Personal* and *Corporate*.

Parent (root) category	Child category	Where content of child categories appears	Example of breadcrumb
All	*Personal*	`My Favorites` on the home page of the SAP BusinessObjects Site Definition template	When you click the *My Data* category in IOMS-Content Explorer on the home page of a site named MyBusinessSite: *MyBusinessSite* > *All* > `<PersonalCategory>` > *My Data*
All	*Corporate*	*Report Repository* page of the SAP BusinessObjects Site Definition template	When you click the *Sales_2011_Forecast* category in IOMS-Content Explorer on the *Reports Repository* page of a site named MyBusinessSite: *MyBusinessSite* > *All* > `<CorporateCategory>` > *Sales_2011_Forecast*

4.3.3 Global breadcrumbs (SharePoint 2016, SharePoint 2013, or SharePoint 2010)

In SharePoint 2016, SharePoint 2013 or SharePoint 2010, in addition to regular breadcrumbs, a global breadcrumb appears at the top of the SAP BusinessObjects site page.

You can access the global breadcrumb by clicking the icon beside the tabs.

The default *SAP BusinessObjects* tab on the site page displays a menu above the IOMS-Content Explorer web part that hides the regular breadcrumb. In this case, the global breadcrumb is the only navigation path that you can see.

5 Setting site preferences

5.1 Setting general site preferences

Site preferences enable you to customize the appearance of the page that appears after you log on to the integration option for SharePoint.

For example, the time zone must be configured before you can schedule objects because it determines when scheduled objects are processed.

> **Note**
>
> In some deployments, the Business Intelligence (BI) platform administrator may have already configured site preferences for the system.

1. Log on to the integration option for Microsoft SharePoint.
2. At the top of the page, click `<YourLogonName>`, and select *My SAP BusinessObjects Settings* from the menu that appears.
   The *User Preferences* page appears in a new window.
3. Under *General*, in the *Product Locale* list, select the language that the software should use.
4. In the *Current Time Zone* list, select the time zone that the software should use.

   The time zone is local to the web server that is running Business Intelligence (BI) platform—not to the Central Management Server (CMS) machine that each user connects to.
5. In the *Preferred Viewing Locale* list, select a locale for viewing Business Intelligence (BI) content, and click *OK*.

   The preferred viewing locale determines formatting conventions for the date, time, and numbers.

5.2 Setting Web Intelligence document preferences

Before accessing Web Intelligence documents, you must set preferences for viewing the documents.

Before setting preferences for Web Intelligence documents:

- You must have a Web Intelligence license. For information about licensing, contact your sales representative.
- You must have administrator rights for applying filters in a drill session.

For business examples of drill options and more information about drilling on Web Intelligence documents, see the *SAP BusinessObjects Web Intelligence User Guide*.

1. Log on to the integration option for Microsoft SharePoint.
2. At the top of the page, click `<YourLogonName>`, and select *My SAP BusinessObjects Settings* from the menu that appears.

The *Preferences* page appears in a new window.

3. Under *Web Intelligence*, for *Select a default view format*, select *Rich Internet Application* or *PDF*.
4. Under *Drill options*, perform any of the following actions:
   a. To receive an alert when a drill action requires a new query to fetch more data from a data source, select the *Prompt when drill requires additional data* check box.

      When Web Intelligence must run a new query to retrieve additional data from a data source, an alert will prompt you to run the new query. You can use filters to restrict the scope of the query to fetch only necessary data for your analysis.

      For example, you may want to drill to a higher or lower level of information.
   b. To synchronize drilling on all Web Intelligence report blocks, select the *Synchronize drill on report blocks* check box.

      Each table, chart, or cell in a report represents a block of data. When you drill on a block in a report, all blocks in the report are simultaneously drilled to the same level.
   c. To hide the Web Intelligence report-filter toolbar in drill mode, select the *Hide Report Filter toolbar on start* check box.

      By default when you start drill mode, the report-filter toolbar appears at the top of the drilled report and displays the values on which the report is drilled. The values filter the results that appear in the drilled report. You can use the report-filter toolbar to select values for filtering results. If a drilled report includes dimensions from multiple queries, a tooltip appears when you move the cursor over the filter value, displaying the name of the query and the dimension for the value.

      For example, select this check box to hide the toolbar when you will not use filters while drilling.

      When the toolbar is displayed, if you drill on a report for the year 2011, for example, results appear for Q1, Q2, Q3, and Q4 of the year 2011 (quarterly values are filtered by the value "2011"). The toolbar displays the value used to drill the report—in this case, "2011."
5. Under *Start drill session*, perform one of the following actions:
   - To create a copy of the original document for drilling, select *On duplicate report*.
     This enables you to compare drilled results with the original document data. When you end drill mode, the original report and the drilled report copy are available for viewing.
   - (Default) To view drilling results in the original document, select *On existing report*.
6. Under *When viewing a document*, perform one of the following actions:
   - To retain the locale used to format the date, time, and numbers when the document was created, select *Use the document locale to format the data*.
   - To format the date, time, and numbers with the locale selected for the integration option for SharePoint, select *Use my Preferred Viewing Locale to format the data*.
7. Under *Select the priority option for saving a MS Excel*, perform one of the following actions:
   - To view Microsoft Excel data in a format that's similar to Web Intelligence format, select *Prioritize the format of reports*.
   - To view Excel data in a text format, select *Prioritize easy data processing in Excel*.
8. Click *OK*.

5.3 Changing your site password

Before you can change your password, you must have administrator rights.

1. Log on to the integration option for Microsoft SharePoint.
2. At the top of the page, click `<YourLogonName>`, and select *My SAP BusinessObjects Settings* from the menu that appears.
   The *User Preferences* page appears in a new window.
3. Under *Change Password*, in the *Old Password* box, enter your current password.
4. In the *New Password* box, enter a new password.
5. In the *Confirm New Password* box, enter the new password again, and click *OK*.

5.4 Editing properties for the IOMS-Content Explorer web part

For each page of a SAP BusinessObjects site, you must set properties for IOMS-Content Explorer web part.

1. Position the mouse pointer above the IOMS-Content Explorer toolbar, and select *Edit Web Part* in the list that appears.

   In Microsoft SharePoint 2007, this option is called *Modify Shared Web Part*.

   The *Properties* panel appears on the right side of page.
2. Under *SAP BusinessObjects* on the *Properties* panel, select properties as needed, and click *OK*.

5.4.1 Editing the Start Folder property for the IOMS-Content Explorer web part

To display a frequently accessed folder in the IOMS-Content Explorer web part each time a page opens, set the *Start Folder* property.

When you set the *Start Folder* property to a frequently accessed folder, only that folder appears in the IOMS-Content Explorer web part. After specifying the *Start Folder* property, you can use the breadcrumb at the top of each page to navigate to files and folders at higher levels in the file hierarchy.

For example, your `My Favorites` folder in the Business Intelligence (BI) platform contains `My Favorites\Reports\Sales\Profits_2010\California` subfolders, and the `California` folder contains `Q1.rpt`, `Q2.rpt`, `SanDiegoQ3.WebI`, and `LA_Q4.xls` reports and other subfolders. To access all content in the `California` folder on the home page of your site, set the *Start Folder* property to *California*.

1. Retrieve the CUID for the folder that will be the start folder:
   a. In the IOMS-Content Explorer web part for the site page, click the context menu for the folder, and select *Properties*.
      The *User Actions* page appears and displays the properties of the folder.

b. Locate the folder property called `ID,CUID`, and copy the value after the delimiter.

2. Position the mouse pointer over the upper-right corner of the IOMS-Content Explorer web part, click the arrow symbol that appears, and select *Edit Web Part* in the menu.
   The *Properties* panel appears on the right side of the page.
3. Under *SAP BusinessObjects* on the *Properties* panel, in the *Start Folder* box, paste the CUID that you retrieved in step 1, and click *OK*.

5.5 Editing properties for the IOMS-Display Search Results web part

For a SAP BusinessObjects site, you can define the number of search results that appear per *Search Results* page.

1. Position the mouse pointer above the IOMS-Display Search Results web part on the *Search Results* page.
2. In the list that appears, select *Edit Web Part*.

   In Microsoft SharePoint 2007, this option is called *Modify Shared Web Part*.

   The *Properties* panel appears on the right side of page.
3. Under *SAP BusinessObjects* on the *Properties* panel, in the *Number of Results per Page* box, enter the number of search results to display per page, and click *OK*.

6 Working with objects

The documents and files in the Business Intelligence (BI) platform repository are called objects. Your BI platform administrator typically adds objects to the platform repository.

In addition, users with administrator rights can upload objects from a local system to the BI repository and can create folders, categories, hyperlinks, Web Intelligence objects, Crystal Reports objects, and Analysis, edition for OLAP, objects. (In earlier versions, Analysis, edition for OLAP was named Advanced Analysis or Voyager.)

When you select a folder or a category in the IOMS-Content Explorer web part, the integration option displays all object types for which you have access rights.

Object types you can access in the BI platform repository

Object icon	Description
	Program (`.exe`)
	Publication
	Hyperlink
	Shortcut
	Xcelsius document
	Web Intelligence document (`.webi`)
	Crystal report (`.rpt`)
	Analysis, edition for OLAP, documents (In earlier versions, the product was named Advanced Analysis or Voyager.)
	Object package
	Rich Text Format (`.rtf`)
	Adobe Reader document (`.pdf`)
	Microsoft Word document (`.doc`)
	Microsoft Excel document (`.xls`)
	Microsoft PowerPoint document (`.ppt`)

Object icon	Description
	Text file (`.txt`)
	Agnostic object (that is, an unknown type of object)

For more information, see the following resources:

- *SAP BusinessObjects Business Intelligence Platform Administrator Guide*
- *SAP Crystal Reports User Guide*
- *Building Reports with the Web Intelligence Report Panel*
- Web Intelligence Help
- *SAP BusinessObjects Analysis, Edition for OLAP User Guide*

6.1 Accessing objects by type

For quick access, you can display only a specify object type (for example, Crystal reports, Web Intelligence documents, or Excel spreadsheets).

1. In the IOMS-Content Explorer list panel, click the *Type* or *Type Description* column title.
   All object types are listed in the menu that appears. They are represented by an icon in the *Type* column and as text in the *Type Description* column.
2. Click the object type that you want to access.
   The list panel refreshes to show only the object type that you selected.

6.2 Creating objects

You can create folders, categories, hyperlinks, Web Intelligence objects, Crystal Reports objects, and Analysis, edition for OLAP, objects.

Before you can create objects, you must have administrator rights.

Click *New* on the IOMS-Content Explorer toolbar, and select the object type to create.

6.2.1 Creating a hyperlink

Hyperlinks direct users to relevant web sites that are outside of the integration option for SharePoint.

Before you can create a hyperlink, you must have administrator rights.

You can create hyperlinks from your site to web pages that were created in the integration option for SharePoint software, and you can use an OpenDocument link as the URL for a hyperlink.

1. In the IOMS-Content Explorer web part, locate and select the folder to create a hyperlink in.

   (SharePoint 2016, SharePoint 2013, and SharePoint 2010) You can also select *New* in the menu at the top of the SAP BusinessObjects site, and go to the *Add Hyperlink* section of the *User Actions* page.
2. Click *New* on the IOMS-Content Explorer toolbar, and select *Hyperlink* in the list.
3. Under *General Properties*, in the *Title* box, enter a name for the hyperlink.
4. (Optional) In the *Description* box, enter a description of the hyperlink.
5. (Optional) In the *Keywords* box, enter keywords for the hyperlink.
6. Under *URL*, enter the URL of the web site to link to, starting with **`http://`**.
7. Under *Categories*, select a category to assign the hyperlink to, and click *OK*.

6.2.2 Creating a publication

For Crystal reports and Web Intelligence documents in the Business Intelligence (BI) platform repository, you can create a publication to send to recipients.

Before you can create a publication, if your site was created with the SAP BusinessObjects Site Definition template, the document being published must exist in the `Reports Repository` or `My Favorites` folder.

1. In the IOMS-Content Explorer web part, locate and select the folder to create the publication in.
2. Click *New* on the IOMS-Content Explorer toolbar, and select *Publication* in the list that appears.

   (SharePoint 2016, SharePoint 2013 and SharePoint 2010) You can also select *New* in the menu at the top of the SAP BusinessObjects site.

   The *User Actions* page appears, displaying the publication view, with the *General Properties* tab selected by default.
3. In the *Title* box, enter a name for the publication.
4. (Optional) In the *Description* box, enter a description of the publication.
   The *User Actions* page appears, displaying the publication view.
5. (Optional) In the *Keywords* box, enter keywords for the publication.
6. Click the *Source Documents* tab, and click the *Add* button.
   The *Select Source Documents* dialog box appears.
7. Locate and select one or more documents to publish, and click *OK*.

   You can locate documents in the folder structure or by searching.

   The *User Actions* page appears, displaying the publication view, which includes the documents you selected. Based on the type of documents selected, new scheduling tabs appear in the publication view.

   For example, if you selected Crystal reports for publishing, the new tabs in the publication view are *Enterprise recipients*, *Dynamic recipients*, *Personalization*, *Formats*, *Destinations*, and *Additional Options*.
8. (Optional) Set scheduling options as needed.
9. Click *Save & Close*.
   The publication is added to the folder you selected and appears in the IOMS-Content Explorer web part.

Position the mouse pointer over the publication name to display a menu of the actions you can perform on the publication, including scheduling and viewing instances.

6.2.3 Creating a folder

1. In the IOMS-Content Explorer web part, locate and select the folder (`Reports Repository` or `My Favorites`) or the view to create a folder in.
2. Click *New* on the IOMS-Content Explorer toolbar, and select *Folder* from the list that appears.

   (SharePoint 2016, SharePoint 2013, and SharePoint 2010) You can also select *New* in the menu at the top of the SAP BusinessObjects site.

   The *Create Folder* dialog box appears.
3. In the *New folder name* box, enter a folder name, and click *OK*.
   The new folder is added and appears in the IOMS-Content Explorer web part.

6.2.4 Creating a Web Intelligence document

1. In the IOMS-Content Explorer web part, locate and select the folder (`Reports Repository` or `My Favorites`) or view to create a Web Intelligence document in.
2. Click *New* on the IOMS-Content Explorer toolbar, and select *Web Intelligence Document* in the list that appears.
   The *User Actions* page appears.
3. In the *Web Intelligence Document* area, click the (*New*) icon.

   (SharePoint 2016, SharePoint 2013, and SharePoint 2010) You can also select *New* in the menu at the top of the SAP BusinessObjects site.

   The *Create a New Web Intelligence Document* dialog box appears, displaying a list of available data sources.
4. Select *Universe* as the data source, and click *OK*.
   The *Universe* dialog box appears, displaying the available universes.
5. Double-click the universe to create a Web Intelligence document in.
   The *Query Panel* dialog box appears. The *Universe Outline* area displays the dimensions of the selected universe.
6. Drag the dimensions to the *Result Objects* area.
7. To apply filters to the data set, move the required filters from the *Universe Outline* area to the *Query Filters* area.

   Filters are represented by an icon.
8. Click the *Run query* button.
   The Web Intelligence report is generated based on the selected dimensions and filters. The report appears in the *Web Intelligence Document* area of the *User Actions* page.
9. On the *File* tab in the *Web Intelligence Document* area, click *Save*.
   The *Save Document* dialog box appears.
10. Select a location in the folder or category hierarchy of the Central Management Server (CMS) in the BI platform or on your local machine, and click *Save*.

If you saved the new Web Intelligence document in a `My Favorites` or `Reports Repository` folder or a category on your site, the document appears in that location in IOMS-Content Explorer.

6.3 Editing properties for an object

You can change the title, description, and keyword properties for an object and the categories that the object belongs to.

Before you can edit an object's properties, you must have administrator rights.

1. In the IOMS-Content Explorer web part, locate the folder containing the object, click *Actions* on the IOMS-Content Explorer toolbar, and select *Properties* in the list.
   The *General Properties* area appears on the *User Actions* page.
2. In the *Title* box, enter a name for the object.
3. (Optional) In the *Description* box, enter a description of the object.
4. (Optional) In the *Keywords* box, enter keywords for the object, and click *OK*.

6.4 Creating a folder or a category

1. Navigate to the folder, category, or view to add a new folder or category to.
2. On the IOMS-Content Explorer toolbar, click *New*, and select *Folder* or *Category*.
3. Enter a name for the folder or category, and click *OK*.

6.4.1 Assigning an object to a category

You can assign an object to a category when you need to easily retrieve the object in the category view of the IOMS-Content Explorer web part.

1. Right-click the file for the object and select *Categories*.
   The *User Actions* page and the *Add Categories* dialog box appear.
2. Select a category to assign the object to, and click *OK*.

6.5 Adding a local document to the BI platform repository

You can add objects (Crystal reports, agnostic documents created in Word or Excel, and PDF files) from your local machine to the Business Intelligence (BI) platform repository, while logged on to the integration option for SharePoint software.

Before you can add local documents to the BI platform repository, you must have administrator rights.

For example, a business analyst created a report about how a merger has affected sales and must share it with the rest of the company. When the business analyst adds the report to the BI platform repository, everyone in the company with appropriate access rights can view it.

For information about adding multiple objects, see publishing wizard information in the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

1. In the IOMS-Content Explorer web part, locate and select the folder to add a local document to.
2. On the IOMS-Content Explorer toolbar, click *Upload*.

   The *User Actions* page appears.
3. In the *Local document* area, enter the path to the local document in the *File name* box, or click *Browse* and locate the file.
4. Change the title, description, or keywords for the document as needed.
5. In the *Categories* area, select the *Personal* or *Corporate* category for the document, and click *OK*.
   The local document is uploaded, with all its properties, to the selected folder in the IOMS-Content Explorer web part.

6.6 Sorting objects

By default, objects are sorted in alphabetical order. You can reverse the order or sort objects by column heading (for example, *Last Run*, *Type*, or *Owner*).

1. Click the column heading to sort the object on.
2. In the menu that appears, select *Sort Ascending* or *Sort Descending*.

6.7 Copying an object

Use the *Copy* toolbar button to create a copy of an object on the clipboard and the *Paste* button to place the copied object.

After creating a copy of an object, you can edit the new object without changing the original version.

1. In the IOMS-Content Explorer web part, locate and select the object to copy.
2. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Copy*.

   > → Tip
   >
   > To copy multiple objects, select the object check boxes in the list panel, and click *Actions* > *Organize* > *Copy*.

   The object is copied to the clipboard.
3. Locate and select the folder to put the object copy in.
4. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Paste*.

6.8 Moving an object

Use the *Cut* toolbar button to remove an object from its current location and the *Paste* button to place the object in a new location.

Shortcuts to an object remain operational after you move the object.

> **Note**
>
> If you select an object, click *Cut*, select another object, and click *Cut* or *Copy*, the second *Cut* or *Copy* action takes precedence. The first object for which you clicked *Cut* is unchanged.

For example, a company that recently opened a second location wants to organize employee reports by location. Folders already exist for each location. The company wants to move reports about employees who work at the second location to the appropriate folder.

1. In the IOMS-Content Explorer web part, locate and select the object to move.
2. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Cut*.

   The object is copied to the clipboard but is not deleted until you paste it to a new location.
3. Locate and select the folder to place the moved object in.
4. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Paste*.

6.9 Deleting an object

Deleting an object also deletes any shortcuts to it.

1. In the IOMS-Content Explorer web part, locate and select the object to delete.
2. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Delete*.
3. Click *OK* to confirm the deletion.

6.10 Creating a shortcut to an object

You can create a shortcut to an object for easy access.

=Shortcuts appear on the list panel of the IOMS-Content Explorer web part and go to the most recent version of an object. For example, Human Resources personnel must refer to a report about employee vacation time on a daily basis—and may have to navigate several folders to access the report. They can create a shortcut to the report in their `My Favorites` folder for easy access.

> **Note**
>
> Shortcuts are objects. All actions that are available for objects are available to shortcuts, including setting properties.

1. In the IOMS-Content Explorer web part, locate and select the object to create a shortcut for.
2. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Copy Shortcut*.
3. Locate and select the folder to create the shortcut in.
4. Click *Actions* on the IOMS-Content Explorer toolbar, and select *Organize* > *Paste Shortcut*.

6.11 Opening documents using OpenDocument links

To open documents using OpenDocument links instead of opening within SharePoint, follow the procedure below:

1. Open ipointconfig.xml in `<Install Directory>\SAP BusinessObjects\SAP BusinessObjects Enterprise XI 4.0\conf\iPoint\ipointconfig.xml`
2. In the *<BusinessObjectsEnterpriseSharePointInfoViewDocumentViewerUrl>* field, replace `:8080/BOE/OpenDocument/opendoc/openDocument.jsp?sIDType=CUID&iDocID=%id %&token=%token%&lang=%lang%` with `/_layouts/OpenDocument/opendoc/openDocument.aspx?sKind=%type%&sIDType=CUID&iDocID=%id%&token=%token%&lang=%lang%`.
3. To reset the Internet Information Server (IIS), choose *Windows* > *Run* > *iisreset*. You can also choose *Windows* > *Command Prompt* > *iisreset*

7 Scheduling objects

When you schedule an object, it automatically runs at the time you specify. An instance is created for each successfully scheduled object.

An instance is a version of the object containing data from the time the object ran. The object's history includes a list of the instances created.

Scheduling objects ensures that instances contain the most current information for viewing, printing, and distributing. You can schedule the following types of objects:

- Crystal reports
- Object packages
  An object package is an object that acts as a container for multiple components (sub-objects). You create and edit object packages in the Central Management Console (CMC) in the Business Intelligence (BI) platform. When you schedule an object package, all components are scheduled simultaneously, and an instance is created for each component. You cannot schedule one component in an object package.
- Programs
- Publications
- Web Intelligence documents

Before scheduling objects, set the time zone under *General* on the *User Preferences* page in the integration option for SharePoint software. Setting the time zone ensures that scheduled objects are processed in your local time. Note that the default time zone is local to the web server that is running the BI platform, not to the Central Management Server (CMS) to which users connect.

For more information about scheduling, see the *SAP BusinessObjects Business Intelligence Launch Pad User Guide* and the *SAP BusinessObjects Business Intelligence Platform User Guide*.

7.1 Scheduling an object

Before scheduling an object, confirm that you have set the time zone in the integration option for SharePoint software.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object to schedule.
2. Right-click the object and select *Schedule*.

   The *User Actions* page appears.
3. Under *Schedule*, choose scheduling options for the object type, and click *Schedule*.

7.2 Scheduling an object package

1. Locate and select the object package to schedule.
2. On the toolbar, click *Actions*, and select *Schedule* in the list that appears.
3. In the *Schedule* dialog box, in the *Instance Title* box, enter a name for the instance.
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 a server group option for the object package.
7. Click *Destinations*, and select a 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.

7.3 Publication formatting options

Document type	Format	Description
All document types	*mHTML*	Publishes a document in mHTML format, which you can embed 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	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)	Publishes a document as a Microsoft Excel (`.xls`) file and preserves as much of the original formatting as possible
Crystal reports	*Microsoft Excel (97-2003) (Data Only)* *Microsoft Excel Workbook Data-only*	Publish a Crystal report as an Excel (`.xls`) file that contains only data

Document type	Format	Description
	XML	Publishes a Crystal report in XML (`.xml`) format
	Crystal Reports	Publishes a Crystal report in its original (`.rpt`) format
	Crystal Reports (RPTR)	Publishes a Crystal report in read-only (`.rptr`) format
	Microsoft Word (97-2003)	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)	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)	Publishes a Crystal report in Rich Text Format (`.rtf`)
	Plain Text	Publishes a Crystal report in plain text (`.txt`) format
	Paginated Text	Publishes a Crystal report in plain text (`.txt`) format and paginates the content of the publication
	Tab Separated Text (TTX)	Publishes a Crystal report in plain text (`.ttx`) format and separates the content in columns with tabs
	Separated Values (CSV)	Publishes a Crystal report as a character-separated values (`.csv`) file
Web Intelligence documents	*Web Intelligence*	Publishes a Web Intelligence document in its original (`.wid`) format

7.3.1 Crystal Report Formatting Options

No additional options appear when you choose *Tab Separated Text (TTX)* as the formatting option. *PDF* options apply to source documents published as PDF files.

Microsoft Excel (97-2003)

Option	Description
Page Range	• To publish an entire report as an Excel file, select *All*. • To publish specific report pages, select *Pages*, enter the first page number in the *from* box, and enter 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 a 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 report columns, select *Constant column width (in points)*, and enter a number in the box.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in Excel files, and select an option in the list—*None*, *Once Per Report*, or *On Each Page*.
Create page breaks for each page	Select this check box to create page breaks that reflect the page breaks in a 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 grid lines in Excel files.

Microsoft Excel (97-2003) (Data Only)

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

Option	Description
Set Column Width	• To define column widths relative to objects in a 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 report columns, select *Constant column width (in points)*, and enter a number in the box.
Export object formatting	Select this check box to preserve object formatting from a report.
Export images	Select this check box to publish report images in Excel files.
Use worksheet functions for summaries	Select this check box to use report summaries to create worksheet functions for Excel files.
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 a report.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in Excel files, 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 in a report.
Show group outlines	Select this check box to show group outlines from a report.

Microsoft Excel Workbook Data-only

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

Option	Description
Set Column Width	• To define column widths relative to objects in a 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 report columns, select *Constant column width (in points)*, and enter a number in the box.
Export object formatting	Select this check box to preserve object formatting in a report.
Export images	Select this check box to publish report images in Excel files.
Use worksheet functions for summaries	Select this check box to use report summaries to create worksheet functions for Excel files.
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 a report.
Export page header and page footer	Select this check box to choose how frequently headers and footers appear in Excel files, 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 in a report.
Show group outlines	Select this check box to show group outlines from a report.

Microsoft Word (97-2003)

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

PDF

Option	Description
Page Range	• To publish an entire report as a PDF file, select *All*. • To publish specific report pages, select *Pages*, enter the first page number in the *from* box, and enter 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 create bookmarks in the generated PDF file based on group tree.

Rich Text Format (RTF)

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

Microsoft Word - Editable (RTF)

Option	Description
Page Range	• To publish an entire report as a Word file, select *All*. • To publish specific report pages, select *Pages*, enter the first page number in the *from* box, and enter 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:	
Insert page break after each report page	Select this check box to create page breaks that reflect the page breaks in a report.

Plain Text

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

Option	Description
Number of Characters per Inch	Enter the number of characters that should appear per inch in a plain text file. The recommended range is between 8 and 16.

Paginated Text

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

Option	Description
Number of Lines per Page	Enter the number of lines that should appear on each page of a paginated text file.
Number of Characters per Inch	Enter the number of characters that should appear per inch in a paginated text file. The recommended range is between 8 and 16.

Separated Values (CSV)

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

Option	Description
Delimiter	Enter the character to use as a delimiter.
Separator	Enter 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	• To export report and page sections, select *Export*. • If you do not want to export report or page sections, select *Do not export*. • To isolate report and page sections, select the *Isolate report/page sections* check box.

Option	Description
Group sections	• To export group sections, select *Export*. • If you do not want to export group sections, select *Do not export*. • To isolate group sections, select the *Isolate report/page sections* check box.

XML

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.

7.4 Publication Destinations

The following destinations are available for publications:

- *Default Enterprise Location*
- *BI Inbox*
- *Email*
- *FTP Server*
- *File System*
- *SFTP Server*

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).

Default Enterprise Location

If you send a publication to this location, choose a folder that is accessible to all recipients.

Publication destination	Actions you can perform on the publication	Instance is saved to
The folder it was created in	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file	Output File Repository Server Historical instances are saved to the default Enterprise server but not to any other destination.

BI Inbox

Publication destination	Actions you can perform on the publication	Instance is saved to
Each recipient's BI Inbox	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file • Deliver objects to individual users • Use default file name or enter a specific file name and add placeholders If you select *Use specific name*, enter a file extension or add the *File Extension* placeholder or select the check box *Add file extension* to automatically add the extension to a file name. **Note** 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 as 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.	• Output File Repository Server • Specified BI Inboxes

Email

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.

Publication destination	Actions you can perform on the publication	Instance is saved to
Each recipient via email	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file • Deliver objects to individual users • (Required) Enter your email address in the *From* box **Note** If you do not enter your email address, the BI platform uses the email address associated with the publisher's account. If the publisher's account has no email address, the platform uses the email address for the Adaptive Job Server. 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 your message and customize it using the rich text editor for formatting options, 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	• Output File Repository Server • Specified email recipients

Publication destination	Actions you can perform on the publication	Instance is saved to
	Note When you insert an image in the email, the image gets downloaded automatically if both sender and reciever have access to the image link used. • Use default file name or enter a specific file name and add placeholders If you select *Use specific name*, enter a file extension or add the *File Extension* placeholder or select the check box *Add file extension* to automatically add the extension to a file name. **Note** If you do not add a file extension to a file name, you may be unable to open the document.	

FTP Server

If you are sending the publication to the *FTP Server* 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.

Publication destination	Actions you can perform on the publication	Instance is saved to
An FTP server (You must enter the FTP server location in the *Host* box. If you do not, the platform uses the FTP server configured for the Adaptive Job Server.)	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file • Enter the port number, user name and password, and account • Enter a directory name • Use default file name or enter a specific file name and add placeholders If you select *Use specific name*, enter a file extension or add the *File Extension* placeholder or select the check box *Add file extension* to automatically add the extension to a file name. **Note** If you do not add a file extension to a file name, you may be unable to open the document.	• Output File Repository Server • Selected FTP server

File System

If you are sending the publication to the *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.

Publication destination	Actions you can perform on the publication	Instance is saved to
A directory on a file system (You must enter the directory for the publication.)	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file • Enter a user name and password to access the file location • Deliver objects to individual users • Use default file name or enter a specific file name and add placeholders If you select *Use specific name*, enter a file extension or add the *File Extension* placeholder or select the check box *Add file extension* to automatically add the extension to a file name. **Note** If you do not add a file extension to a file name, you may be unable to open the document.	• Output File Repository Server • Selected file location

SFTP Server

If you are sending the publication to the *SFTP Server* 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.

Publication destination	Actions you can perform on the publication	Instance is saved to
An SFTP server (You must enter the SFTP server location in the *Host* box. If you do not, the platform uses the SFTP server configured for the Adaptive Job Server.)	• Merge all exported PDF documents (Crystal reports only) • Package the publication as a compressed (`.zip`) file • Enter the port number, user name and password, and account • Enter a directory name • Enter the fingerprint • Use default file name or enter a specific file name and add placeholders If you select *Use specific name*, enter a file extension or add the *File Extension* placeholder or select the check box *Add file extension* to automatically add the extension to a file name. **Note** If you do not add a file extension to a file name, you may be unable to open the document.	• Output File Repository Server • Selected SFTP server

7.4.1 Destination Options

You can change options for the default Adaptive Job Server in the *Servers* area of the Central Management Console (CMC).

> **Note**
>
> In CMC, *Google Drive* as a destination is not supported while scheduling. But you need to add this destination, and you can then select it in BI Launch pad.

For more information, see the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

Default Enterprise Location options

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.

BI Inbox options

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 the 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 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)	Enter a recipient's user name, full name, or email address in the *Find title* box to quickly locate the user in the *Available Recipients* list.
Target Name	• To use a system-generated file name for the instance, select *Use Automatically Generated Name*. • To choose a file name for the instance, select *Use Specific Name*, and enter a name or select variables for the file name from the *Add placeholder* list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*, *Date*, and *File Extension*.
Send As	• To send a shortcut to the instance to recipients, select *Shortcut*. • To send a copy of the instance to recipients, select *Copy*.

Email options

Option	Description
Destination	*Email*
Keep an instance in the history	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 the 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	Enter 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*, and *Date*. Click a variable to add it. Separate email addresses with a semicolon (;). This option may be unavailable, depending on your system configuration.
To	Enter 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*, and *Date*. Click a variable to add it. Separate email addresses with a semicolon (;).
Cc	Enter each email address that you want to send a copy of the email and instance to, or select variables for the email address from the *Add placeholder* list. The available variables are *Title*, *ID*, *Owner*, *DateTime*, (your) *Email Address*, and (your) *User Full Name*, and *Date*. Click a variable to add it. Separate email addresses with a semicolon (;).
Bcc	Enter 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 (;).
Reply To	You can now use the *Reply To* option to specific users for Email as a destination. This is applicable for scheduling in both CMC and BILaunch Pad.
Subject	Enter the subject of the email.
Message	For the body of the email, you can now customize your message content using the rich text editor with a custom toolbar having various formatting options. **Note** When you insert an image in the email, the image gets downloaded automatically if both sender and reciever have access to the image link used.

Option	Description
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 enter a name or select variables for the file name from the *Add placeholder* list. 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.

FTP Server options

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 the 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 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	Enter the IP address of the FTP server host computer where you want to send the instance.
Port	Enter the port of the FTP server where you want to send the instance. The default is **21**.
User Name	Enter a user name with access rights to upload the object to the FTP server.
Password	Enter the password required to access the FTP server.
Account	Enter the account required to access the FTP server. The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.
Directory	Enter the path to the FTP directory where you want to send the instance.

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 enter 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*, *Date*, 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.

SFTP (Secure FTP) Server options

Option	Description
Destination	*SFTP 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 the 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 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	Enter the IP address of the FTP server host computer where you want to send the instance.
Port	Enter the port of the FTP server where you want to send the instance. The default is **21**.
User Name	Enter a user name with access rights to upload the object to the FTP server.
Password	Enter the password required to access the FTP server.
Account	Enter the account required to access the FTP server. The account is part of the standard FTP protocol but is rarely implemented. Enter an account only if your FTP server requires it.
Directory	Enter the path to the FTP directory where you want to send the instance.

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 enter 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*, *Date*, 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.
Fingerprint	Enter your fingerprint. For more information on how to enter your finger-print, refer to the *SAP BusinessObjects Business Intelligence Platform Administrator Guide*.

File System options

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 the BI platform to automatically delete the instance from the Output FRS to minimize the number of instances on the server. 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	Enter a user name with access rights to save files to the destination directory. You can specify a user name and password only for servers on Windows.
Password	Enter the user password that is required to access the destination directory. You can specify a user name and password only for servers on Windows.
Directory	Enter the path to a local hard disk location or mapped location or a UNC path to the directory where you want to send the instance. If you are scheduling a Web Intelligence document and want to create folders based on variables (such as the title of the instance, owner, date and time, or user names), use a placeholder. The placeholder is inserted after the text in the box.

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 enter 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*, *Date*, 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.

7.5 Scheduling options for publications

Some scheduling options are preconfigured by the administrator. You can use the default values or modify the values.

Option	Description
Instance Title	Enter the name of the instance. By default, the object title is displayed.

Option	Description
Recurrence	Choose a recurrence pattern, which sets a repeating schedule for running an object: • Select *Hourly* to run the object every hour, and enter the time and date when it should start and end. • Select *Daily* to run the object every day or at a regular daily interval, and enter the time and date when it should start and end. • Select *Weekly* to run the object each week (either once or several times), and enter the days when it should run and the time and date when it should start and end. • Select *Monthly* to run the object each month or every several months, and enter the time and date when it should start and end. • Select *Nth Day of Month* to run the object on a specific day in the month, and enter the day of the month when it should run and the time and date when it should start and end. • Select *1st Monday of Month* to run the object on the first Monday of each month, and enter the time and date when it should start and end. • Select *Last Day of Month* to run the object on the last day of each month, and enter the time and date when it should start and end. • Select *X Day of Nth Week of the Month* to run the object on a particular day of a particular week of the month, and enter the time and date when it should start and end. • Select *Calendar* to run the object on particular dates specified in a Business Intelligence (BI) platform calendar, and enter the time and date when it should start and end. (Calendars are customized lists of schedule dates, created by the BI platform administrator.) In the *Number of retries allowed* box, specify the number of times the server should attempt to run the job, if the job fails. In the*Retry interval in seconds* box, set the time period in which the server must wait before retrying the job.
Enterprise Recipients	Choose users in the BI platform to distribute the publication to.

Option	Description
Dynamic Recipients	Select a dynamic recipient source—a document or custom data provider that provides information about publication recipients outside of the BI platform. Dynamic recipients are publication recipients who do not have user accounts in the platform but do have user information in an external data source. To distribute a publication to dynamic recipients.
Events	Choose an event that will trigger the publication to run: • To specify file-based and custom events for the job, click the < button to move events from the *Available Events* list to the *Events to wait for* list. The event triggers the job to run. • To specify scheduling events for a job, click the > button to move events from the *Available Schedule Events* list to the *Events to trigger on completion* list.
Scheduling Server Group	Choose a server on which to run the publication: • (Default) Select *Use the first available server* to run the publication 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 publication 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 publication is run on the next available server. • Select *Only use servers belonging to the selected group* to run the publication 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 publication is not processed.
Prompts	Click *Edit Values* to edit a prompt value. Prompts ask you to enter information. In report objects, the information you enter may determine which data appears in a report.
Formats	Choose the format in which to save the instance.

Option	Description
Destinations	Choose the location (that is, the destination) to deliver the instance to. The destination can be the BI platform location in which an instance in stored, a BI Inbox, an email address, an FTP server, or a directory in the file system. You can specify multiple destinations.

7.5.1 Scheduling options for Crystal reports

Some scheduling options are preconfigured by the administrator. You can use the default value or select a different value.

Option	Description
Instance Title	Enter the name of the instance. By default, the object title is displayed.

Option	Description
Recurrence	Choose a recurrence pattern, which sets a repeating schedule for running an object: • Select *Hourly* to run the object every hour, and enter the time and date when it should start and end. • Select *Daily* to run the object every day or at a regular daily interval, and enter the time and date when it should start and end. • Select *Weekly* to run the object each week (either once or several times), and enter the days when it should run and the time and date when it should start and end. • Select *Monthly* to run the object each month or every several months, and enter the time and date when it should start and end. • Select *Nth Day of Month* to run the object on a specific day in the month, and enter the day of the month when it should run and the time and date when it should start and end. • Select *1st Monday of Month* to run the object on the first Monday of each month, and enter the time and date when it should start and end. • Select *Last Day of Month* to run the object on the last day of each month, and enter the time and date when it should start and end. • Select *X Day of Nth Week of the Month* to run the object on a particular day of a particular week of the month, and enter the time and date when it should start and end. • Select *Calendar* to run the object on particular dates specified in a Business Intelligence (BI) platform calendar, and enter the time and date when it should start and end. (Calendars are customized lists of schedule dates, created by the BI platform administrator.) In the *Number of retries allowed* box, specify the number of times the server should attempt to run the job, if the job fails. In the*Retry interval in seconds* box, set the time period in which the server must wait before retrying the job.
Database Logon	Enter the logon information required for the object's data source. You must have appropriate access rights to the object's data source.

Option	Description
Prompts	Click *Edit Values* to edit a parameter value. Parameters ask you to enter information. The information you enter may determine which data appears in a report.
Filters	Modify the record or group selection formula. Selection formulas help determine which data appears in a report and may improve performance by eliminating unwanted records.

Option	Description
Formats	Choose a format in which to save the instance in the *Output Format* list: • Select *Crystal Reports* to save the instance in a Crystal report format. • Select *Microsoft Excel (97-2003)* to save the instance in Excel format and preserve the original report formatting. • Select *Microsoft Excel (97-2003) (Data Only)* to save the instance in Excel format, when you do not want to preserve formatting and will not merge cells in the instance. • Select *Microsoft Word (97-2003)* to save the instance in Word format and preserve as much formatting as possible, including graphics. (Each object appears in an individual text field.) • Select *PDF* to save the instance in PDF. • Select *Rich Text Format (RTF)* to save the instance in RTF and preserve as much formatting as possible, including graphics. (Each object appears in an individual text field.) • Select *Microsoft Word (97-2003) — Editable (RTF)* to save the instance in Word format, when you do not want to preserve as much formatting as with *Microsoft Word (97-2003)*. (Text appears in lines, and images are placed inline with the text.) • Select *Plain Text* to save the instance as plain text. • Select *Paginated Text* to save the instance as paginated text. • Select *Tab Separated Text (TTX)* to save the instance in TTX format, insert a tab between values, and attempts to preserve the original report formatting • Select *Separated Values (CSV)* to save the instance in CSV format and insert a comma between values, when you do not want to preserve formatting • Select *XML* to save the instance in XML format. When you choose a file format other than *Crystal Reports*, the instance preserves as much formatting as the export format allows. Some or all formatting may be lost.

Option	Description
Destinations	Choose the location to deliver the instance to. The destination can be the BI platform location in which an instance in stored, a BI Inbox, an email address, an FTP server, or a directory in the file system. You can specify multiple destinations.
Print Settings	Choose print options for the default printer. The BI platform prints instances before delivery.
Events	Set the job to run after an event occurs or to be triggered by an event: • To specify file-based and custom events for the job, click the < button to move events from the *Available Events* list to the *Events to wait for* list. The event triggers the job to run. • To specify scheduling events for a job, click the > button to move events from the *Available Schedule Events* list to the *Events to trigger on completion* list.
Scheduling Server Group	Choose a server to run the Crystal report on: • (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.
Languages	Choose a language, based on locale, for the instance: • To schedule the report and create instances using only the preferred viewing locale set in your preferences, 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.

7.5.2 Scheduling options for Web Intelligence documents

Some scheduling options are preconfigured by the administrator. You can use the default value or select a different value.

Option	Description
Instance Title	Enter the name of the instance. By default, the object title is displayed.

Option	Description
Recurrence	Choose a recurrence pattern, which sets a repeating schedule for running an object: • Select *Hourly* to run the object every hour, and enter the time and date when it should start and end. • Select *Daily* to run the object every day or at a regular daily interval, and enter the time and date when it should start and end. • Select *Weekly* to run the object each week (either once or several times), and enter the days when it should run and the time and date when it should start and end. • Select *Monthly* to run the object each month or every several months, and enter the time and date when it should start and end. • Select *Nth Day of Month* to run the object on a specific day in the month, and enter the day of the month when it should run and the time and date when it should start and end. • Select *1st Monday of Month* to run the object on the first Monday of each month, and enter the time and date when it should start and end. • Select *Last Day of Month* to run the object on the last day of each month, and enter the time and date when it should start and end. • Select *X Day of Nth Week of the Month* to run the object on a particular day of a particular week of the month, and enter the time and date when it should start and end. • Select *Calendar* to run the object on particular dates specified in a Business Intelligence (BI) platform calendar, and enter the time and date when it should start and end. (Calendars are customized lists of schedule dates, created by the BI platform administrator.) In the *Number of retries allowed* box, specify the number of times the server should attempt to run the job, if the job fails. In the*Retry interval in seconds* box, set the time period in which the server must wait before retrying the job.

Option	Description
Formats	Under *Output Format*, choose a format in which to save the instance: • *Web Intelligence* • *Microsoft Excel* • *PDF* • *mHTML*
Caching	In the *Available Formats to Cache* list, choose a format in which to cache the document. If necessary, select the locale in which to preload the cache. If you do not select a cache format, the BI platform will not cache the document.
Events	Choose an event that will trigger the publication to run: • To specify file-based and custom events for the job, click the < button to move events from the *Available Events* list to the *Events to wait for* list. The event triggers the job to run. • To specify scheduling events for a job, click the > button to move events from the *Available Schedule Events* list to the *Events to trigger on completion* list.
Scheduling Server Group	Choose a server on which to run the publication: • (Default) Select *Use the first available server* to run the publication 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 publication 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 publication is run on the next available server. • Select *Only use servers belonging to the selected group* to run the publication 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 publication is not processed.

Option	Description
Destinations	Choose the location (that is, the destination) to deliver the instance to. The destination can be the BI platform location in which an instance in stored, a BI Inbox, an email address, an FTP server, or a directory in the file system. You can specify multiple destinations.
Prompts	Click *Edit* to edit a prompt value. Prompts ask you to enter information. In report objects, the information you enter may determine which data appears in a report.

7.5.3 Scheduling options for programs

Some scheduling options are preconfigured by the administrator. You can use the default value or select a different value.

Option	Description
Instance Title	Enter the name of the instance. By default, the object title is displayed.

Option	Description
Recurrence	Choose a recurrence pattern, which sets a repeating schedule for running an object: • Select *Hourly* to run the object every hour, and enter the time and date when it should start and end. • Select *Daily* to run the object every day or at a regular daily interval, and enter the time and date when it should start and end. • Select *Weekly* to run the object each week (either once or several times), and enter the days when it should run and the time and date when it should start and end. • Select *Monthly* to run the object each month or every several months, and enter the time and date when it should start and end. • Select *Nth Day of Month* to run the object on a specific day in the month, and enter the day of the month when it should run and the time and date when it should start and end. • Select *1st Monday of Month* to run the object on the first Monday of each month, and enter the time and date when it should start and end. • Select *Last Day of Month* to run the object on the last day of each month, and enter the time and date when it should start and end. • Select *X Day of Nth Week of the Month* to run the object on a particular day of a particular week of the month, and enter the time and date when it should start and end. • Select *Calendar* to run the object on particular dates specified in a Business Intelligence (BI) platform calendar, and enter the time and date when it should start and end. (Calendars are customized lists of schedule dates, created by the BI platform administrator.) In the *Number of retries allowed* box, specify the number of times the server should attempt to run the job, if the job fails. In the*Retry interval in seconds* box, set the time period in which the server must wait before retrying the job.

Option	Description
Destinations	Choose the location (that is, the destination) to deliver the instance to. The destination can be the BI platform location in which an instance in stored, a BI Inbox, an email address, an FTP server, or a directory in the file system. You can specify multiple destinations.
Events	Choose an event that will trigger the publication to run: • To specify file-based and custom events for the job, click the < button to move events from the *Available Events* list to the *Events to wait for* list. The event triggers the job to run. • To specify scheduling events for a job, click the > button to move events from the *Available Schedule Events* list to the *Events to trigger on completion* list.
Scheduling Server Group	Choose a server on which to run the publication: • (Default) Select *Use the first available server* to run the publication 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 publication 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 publication is run on the next available server. • Select *Only use servers belonging to the selected group* to run the publication 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 publication is not processed.

7.5.4 Scheduling options for object packages

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) in the Business Intelligence (BI) platform.

You can set the following scheduling options at an object-package level:

- Recurrence
- Destinations
- Events

- Server group settings

You can 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)

Some scheduling options are preconfigured by the administrator. You can use the default value or select a different value.

Option	Description
Instance Title	Enter the name of the instance. By default, the object title is displayed.

Option	Description
Recurrence	Choose a recurrence pattern, which sets a repeating schedule for running an object: • Select *Hourly* to run the object every hour, and enter the time and date when it should start and end. • Select *Daily* to run the object every day or at a regular daily interval, and enter the time and date when it should start and end. • Select *Weekly* to run the object each week (either once or several times), and enter the days when it should run and the time and date when it should start and end. • Select *Monthly* to run the object each month or every several months, and enter the time and date when it should start and end. • Select *Nth Day of Month* to run the object on a specific day in the month, and enter the day of the month when it should run and the time and date when it should start and end. • Select *1st Monday of Month* to run the object on the first Monday of each month, and enter the time and date when it should start and end. • Select *Last Day of Month* to run the object on the last day of each month, and enter the time and date when it should start and end. • Select *X Day of Nth Week of the Month* to run the object on a particular day of a particular week of the month, and enter the time and date when it should start and end. • Select *Calendar* to run the object on particular dates specified in a Business Intelligence (BI) platform calendar, and enter the time and date when it should start and end. (Calendars are customized lists of schedule dates, created by the BI platform administrator.) In the *Number of retries allowed* box, specify the number of times the server should attempt to run the job, if the job fails. In the*Retry interval in seconds* box, set the time period in which the server must wait before retrying the job.

Option	Description
Events	Choose an event that will trigger the publication to run: • To specify file-based and custom events for the job, click the < button to move events from the *Available Events* list to the *Events to wait for* list. The event triggers the job to run. • To specify scheduling events for a job, click the > button to move events from the *Available Schedule Events* list to the *Events to trigger on completion* list.
Scheduling Server Group	Choose a server on which to run the publication: • (Default) Select *Use the first available server* to run the publication 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 publication 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 publication is run on the next available server. • Select *Only use servers belonging to the selected group* to run the publication 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 publication is not processed.
Destinations	Choose the location (that is, the destination) to deliver the instance to. The destination can be the BI platform location in which an instance in stored, a BI Inbox, an email address, an FTP server, or a directory in the file system. You can specify multiple destinations.
Components	Select the check box beside the name of each component to add to the object package. You can set notification, database logon, filters, formatting, printing, caching, and parameters or prompts for each component.

8 Working with instances

8.1 Pausing and resuming instances

You can pause and resume a scheduled instance. That is, the pause and resume operations can be performed only on instances that have a Pending or Recurring status.

For example, if a Business Intelligence (BI) platform job server is down for maintenance, you may want to pause a scheduled instance to prevent the system from running the object. Pausing the instance prevents scheduled jobs from failing when the job server is not running. When the job server is running again, you can resume the scheduled instance.

8.2 Rescheduling an instance

You can reschedule instances that have a status of Success, Recurring, or Failed. If you reschedule an instance, a new instance is created.

Before you can reschedule an instance, the status of the instance must be Success, Recurring, or Failed.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object to reschedule.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *History* in the list.
   The *User Actions* page appears, displaying all available instances for the object in the *History* area. If an instance is not available, a `No items to display` message appears.
3. In the list of available instances, select the instance to reschedule.
4. On the *User Actions* page, click *Actions* on the toolbar, and select *Reschedule* in the list.
   The *Reschedule* page appears.
5. Specify scheduling options as needed, and click *Schedule*.
   The *History* area of the *User Actions* page displays information about the new instance.

8.3 Replacing an instance

You can replace an instance that has a status of Recurring or Pending. You replace it by creating a new instance with the scheduling parameters defined for the existing instance.

Before you can replace an instance, the status of the instance must be Recurring or Pending.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the instance to replace.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *History* in the list.
   The *User Actions* page appears, displaying all available instances for the object in the *History* area. If an instance is not available, a `No items to display` message appears.

3. Select the instance to replace.
4. On the IOMS-Content Explorer toolbar, click *Actions*, and select *Reschedule* in the list.
   The *Reschedule* page appears.
5. In the list of rescheduling options, select *Replace*.
6. Select *Replace existing schedule* or *Create new schedule from existing schedule*.
7. Click *Schedule*.
   The *History* area on the *User Actions* page displays the new instance.

8.4 Viewing the most recent instance of an object

You can view the latest successful instance of an object.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object for which you want to view the most recent instance.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *View Latest Instance* in the list.
   The latest successful instance appears in the default viewer web part. For example, if you selected a Crystal report instance, the instance appears in the IOMS-Document viewer web part.
3. Click *Refresh* ( ) on the toolbar to refresh the report with the most recent data from the object's data source.

8.5 Deleting an instance

You can delete instances for any object.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object for which to delete an instance.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *History* in the list.
   The *User Actions* page appears, displaying all successful instances for the object in the *History* area.
3. Select the instance to delete.
4. On the IOMS-Content Explorer toolbar, click *Delete*.

8.6 Viewing the history of instances

The Business Intelligence (BI) platform saves the history of successful instances for an object.

The instance history is listed chronologically and contains the following information:

- Instance time
- Title

- Run by
- Parameters
- Format
- Status

To sort instances by run time, click the *Instance Time* column heading. Click the column heading again to reverse the sort order. To sort instances by owner or status, click the column heading.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object for which to view the instance history.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *History* in the list.
   The *User Actions* page appears, displaying all successful instances for the object in the *History* area. You can display all available instances or only instances that you scheduled.
3. In the *Instance Time* column, double-click a link to view the instance.

   The instance opens in the default document viewer web part.

   > ⓘ Note
   >
   > The information displayed depends on the object type.

   For example, if you selected a Crystal report instance, the instance opens in the IOMS-Document Viewer web part. The *History* area for object packages includes fewer columns, and the *History* area for publications includes additional columns such as *Enterprise recipients* and *Dynamic recipients*.

8.7 Sending an object, instance, or shortcut

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object, instance, or shortcut to send.
2. On the IOMS-Content Explorer toolbar, click *Actions*, and select *Send* in the list.
3. Choose a destination to send the object to:
   - *BusinessObjects Inbox*
   - *Email*
   - *FTP location*
   - *File location*

   The *User Actions* page appears.
4. Select the object, instance, or shortcut to send.

8.8 Retrieving the link to an object

Before you can share an object with another user, you must retrieve the link to the object and send the link to the user.

Any user who receives the link can view the object, regardless of whether the integration option for SharePoint or the Business Intelligence (BI) platform is installed on the user's system. The link is an OpenDocument URL

provided by integration option for SharePoint for the object. After clicking the link, the user is directed to a BI platform logon page and can view the object after successful authentication.

1. In the IOMS-Content Explorer web part, locate and select the folder containing the object for which to send a link.
2. Right-click the object and select *Document Link*.
   A dialog box appears, displaying the URL to the object in a text box.
3. Click the *Copy Link* button.

   If you use a Mozilla Firefox or Google Chrome browser, the *Copy Link* button is not available. Instead, select the document URL in the text box and press `Ctrl` + `C` to copy the link.

   The document URL is copied to the clipboard.
4. Press `Ctrl` + `V` to paste the URL in a text file, and click the link to verify that it goes to the correct object.
5. Press `Ctrl` + `V` to paste the URL in an e-mail message or another location.

8.9 Sticking reports

Sticking associates a report to a web part (that is, a viewer) in the integration option for SharePoint software.

You can stick a report using the viewer properties or the viewer toolbar.

When you stick a report to a web part, the web part becomes the object's primary viewer. Each time you log on to SharePoint and connect to the Central Management Server (CMS) in the Business Intelligence (BI) platform, the report automatically opens in that web part. This is useful for BI reports of high or critical importance that you need to view regularly.

The primary content web part configured by the administrator for each object type such as Web Intelligence documents, Crystal reports, and third-party documents (Microsoft Word, Microsoft Excel, PDF, and so on) is IOMS-Document Viewer.

8.9.1 Sticking a report via the viewer properties

1. Position the mouse pointer above the viewer toolbar, click the list that appears, and select *Edit Web Part*.
   The web part *Properties* area appears, displaying the viewer properties.
2. In the *SAP BusinessObjects* properties, to stick a specific report, enter the report CUID in the *Preferred Report CUID* box.

   The CUID is listed in the report properties on the *User Actions* page. To access report properties, right-click the object and select *Properties*.
3. To stick the last report you viewed, select the *Stick Last Viewed Report* check box.
4. Click *OK*.

8.9.2 Sticking a report via the viewer toolbar

1. In the upper-right corner of any page on the SAP BusinessObjects site, select `<System/SiteName>` > *Personalize this Page* >.
   The page reloads in personal mode.
2. Open the report to stick.
   The report opens in its primary viewer.
3. Click the toolbar of the primary viewer, and select *Stick This Report*.

The report is stuck and will open each time you log on to this SAP BusinessObjects site.

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