HP Storage Essentials Storage Resource Management Report Optimizer Software 6.0

InfoView User's Guide

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Contents

1 Getting Started

Overview

HP Storage Essentials Storage Resource Management Report Optimizer software comes with InfoView, a web desktop that acts as a window to a broad range of useful business information around your company. From InfoView, you can access Crystal reports, OLAP Intelligence reports, Web Intelligence documents, Desktop Intelligence documents, and other objects, and organize them to suit your preferences.

The features that are available in InfoView vary by content type, but in general, you can view information in your web browser, export it to other business applications (such as Microsoft Excel), and save it to a specified location. SRM Report Optimizer also provides access to a range of analytic tools that help you explore information in more detail.

The following additional features are available with InfoView when you have the appropriate license(s):

- **Discussions**

  This feature enables users to create and share notes about reports, documents, and other objects in InfoView. For more information, see "Using Discussions" on page 49.
- **Encyclopedia**

  This feature provides users with key information about reports and documents to facilitate the analysis of business intelligence. For more information, see "Using Encyclopedia" on page 53.
- **OLAP Intelligence**

  This feature allows users to create customized OLAP reports based on multi-dimensional data sources. For more information, see "Working with OLAP Intelligence Reports" on page 113.
- **Process Tracker**

  This feature enables users to map, track, and communicate business processes through a set of activities, associated reports, and analytics. For more information, see the *Process Tracker User's Guide*.
- **Publisher**

  This feature lets users deliver information in a customized format by providing a secure environment in which to share information in a personalized way. For more information, see the *Publisher User's Guide*.

For information about the availability of these features in your deployment, contact your SRM Report Optimizer administrator.

Logging on to InfoView

To use InfoView, you must have one of the following web browsers installed on your machine:

- Microsoft Internet Explorer
- Safari (for Macintosh users)

Note: To use the advanced features of SRM Report Optimizer and InfoView, it is recommended that you use Internet Explorer.

To log on to InfoView

1. Open your web browser.
2. Go to http://*webserver*/businessobjects/enterprise115/desktoplaunch/InfoView/logon/logon.do

   Replace *webserver* with the name of the web server that is set up for SRM Report Optimizer. You may need to ask your administrator for the name of the web server or the exact URL to enter.

   NOTE: If you have any SRM Report Optimizer client tools installed, on Windows, you can also click Start > Programs > BusinessObjects XI Release 2 > BusinessObjects Enterprise > BusinessObjects Enterprise .NET/Java InfoView.

   The Log On to InfoView page appears.
3. In the **System** field, type the name of the machine that hosts your Central Management Server (CMS).
4. In the **User name** and **Password** fields, type your logon credentials.

   NOTE: If you want to log on as a guest, leave both fields blank.
5. From the **Authentication** list, select Enterprise, LDAP, Windows AD, or Windows NT.
   - Enterprise authentication requires a user name and password that are recognized by SRM Report Optimizer.
   - LDAP authentication requires a user name and password that are recognized by an LDAP directory server.
   - Windows AD authentication requires a user name and password that are recognized by Windows AD.
   - Windows NT authentication requires a user name and password that are recognized by Windows NT.

   Enterprise authentication is the default authentication method. LDAP, Windows AD, Windows NT, and other third-party authentication types require special setup. For more information, see the *SRM Report Optimizer Administrator's Guide*.
6. Click **Log On**.

The InfoView home page appears.

InfoView home page

If you successfully logged on, the InfoView home page appears in your web browser.

The folders and objects that you can see in InfoView, the rights that you have to schedule, the viewer that you see, and so on, are dependent on the account with which you log on, the rights that are granted to you by your SRM Report Optimizer administrator, and the settings that both you and your administrator enable.

The InfoView home page is divided into several panels. For information about each panel, see the following sections:

- "Header panel" on page 7
- "Navigation panel" on page 8
- "Workspace panel" on page 9

Header panel

The Header panel displays the logo and the user name of the account that you used to log on to InfoView. It has a toolbar that you can use to perform the following actions:

Option	Description
	**Home** Displays the InfoView home page.
	**Toggle Navigation** Shows/hides the Navigation panel.
	**Toggle Encyclopedia** Shows/hides the Encyclopedia panel.
 New	**Create a new item** Creates a new folder, category, or object.
	**Refresh the Workspace Panel** Refreshes the Workspace panel.
 Send	**Send a document** Sends an object or instance to a destination.
 My InfoView	**My InfoView** Allows you to create custom dashboards.

Option	Description
	**Search** Allows you to search for objects.
	**Preferences** Allows you to set how information is displayed.
	**Log off** Logs the user off.
	**Help** Displays the online help for InfoView.

Navigation panel

The Navigation panel displays a tree that shows your place in the structure of folders or categories in InfoView. It has a toolbar that you can use to perform the following actions:

Option	Description
	**Show folders** Displays the available folders.
	**Show categories** Displays the available categories.
	**Refresh the Navigation Panel** Refreshes the Navigation panel.
	**Properties** Sets properties for the selected folder/category.
	**Move** Moves the selected folder/category.
	**Copy** Makes a copy of the selected folder/category.
	**Delete** Deletes the selected folder/category.

Workspace panel

The Workspace panel displays the objects that are located in a folder or assigned to a specific category. It is in this panel that you do activities such as viewing, scheduling, and modifying objects, setting your InfoView preferences, and so on. It has a toolbar that you can use to perform the following actions:

Option	Description
	**Organize** Allows you to organize the selected object.
	**Delete** Deletes the selected object.
	**Filter** Filters the types of objects that are displayed.

Recommended reading

Depending on how you use SRM Report Optimizer and InfoView, you may want to focus on specific sections of this document.

Viewing objects

If you use SRM Report Optimizer to view objects such as reports, you do not need to read about the advanced features of InfoView. It is recommended that you read only the following sections:

- "Getting Started" on page 5
- "Setting Preferences" on page 13
- "Working with Objects" on page 29

Related documentation

SRM Report Optimizer ships with the following additional documentation:

Table 1 Additional Documentation

Document	Description
HP Storage Essentials Storage Resource Management Report Optimizer Quick Start Guide	Provides a basic overview of several common SRM Report Optimizer tasks, and provides references to other documents for more detailed information.
HP Storage Essentials Storage Resource Management Report Optimizer InfoView User's Guide.	Provides information about using InfoView, the corporate business intelligence portal. This guide shows you how to view, schedule, and organize reports over the web using InfoView. It also describes the different report viewers and shows you how to publish reports to the system.
Performing On-Report Analysis with Web Intelligence.	Provides information about viewing, analyzing, and enhancing Web Intelligence reports interactively on the web. This guide includes information on filtering and sorting report data, adding calculations, and modifying the formatting and data content of reports (all without needing to launch a Web Intelligence report panel).
Building Reports Using the Web Intelligence Java Report Panel	Provides information about using the Web Intelligence Java Report Panel for reporting and analysis. This guide includes detailed explanations of power features, such as including advanced filters and formulas.
Contexts Guide	Provides information about the contexts that are defined in SRM Report Optimizer. Contexts show the relationships between objects in a report.

HP technical support

Telephone numbers for worldwide technical support are listed on the HP support web site: http://www.hp.com/support/.

Collect the following information before calling:

- Technical support registration number (if applicable)
- Product serial numbers
- Product model names and numbers
- Applicable error messages
- Operating system type and revision level
- Detailed, specific questions

For continuous quality improvement, calls may be recorded or monitored.

HP strongly recommends that customers sign up online using the Subscriber's choice web site at http://www.hp.com/go/e-updates.

- Subscribing to this service provides you with e-mail updates on the latest product enhancements, newest versions of drivers, and firmware documentation updates as well as instant access to numerous other product resources.
- After signing up, you can quickly locate your products by selecting **Business support** and then **Storage** under Product Category.

HP-authorized reseller

For the name of your nearest HP-authorized reseller:

- In the United States, call 1-800-345-1518.
- Elsewhere, visit the HP web site: http://www.hp.com. Then click **Contact HP** to find locations and telephone numbers.

Helpful web sites

For third-party product information, see the following HP web sites:

- http://www.hp.com
- http://www.hp.com/go/storage
- http://www.hp.com/support/

2 Setting Preferences

Overview

Preferences determine how you log on to InfoView and what view is displayed when you do. They also determine specific settings for the various objects that you view, such as viewers for Crystal reports and OLAP Intelligence reports and view formats for Web Intelligence and Desktop Intelligence documents.

For information about setting the preferences for each object type, see the following sections:

- "Desktop Intelligence preferences" on page 15
- "OLAP Intelligence preferences" on page 15
- "Crystal Reports preferences" on page 16
- "Web Intelligence preferences" on page 22

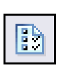
Note: As a best practice, you should set your preferences before you begin to work with objects in InfoView. However, depending on your deployment, your SRM Report Optimizer administrator may have configured your system to use predetermined settings by default.

General preferences

This section describes how to set your general viewing preferences for InfoView.

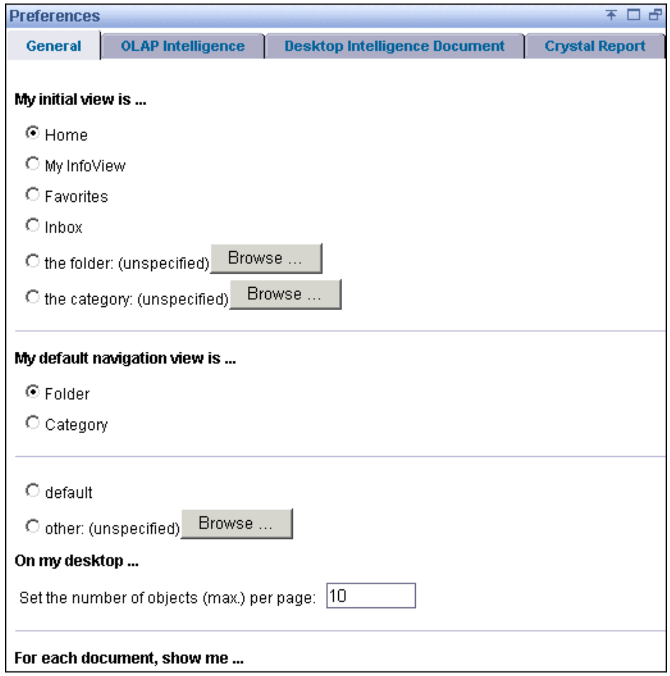
To set general preferences

1. Log on to InfoView.



2. On the Header panel toolbar, click **Preferences**.

The Preferences appears.



3. In the "My initial view is" area, select the option that you want to set as your initial view.

   For example, if you choose Favorites, then the Favorites folder is automatically displayed on the Workspace panel the next time you log on.

   NOTE: You can also customize a dashboard to be your initial view. For details, see "Creating a dashboard" on page 47.

4. In the "My default navigation view is" area, select **Folder** or **Category**.

   The option that you choose determines whether the Navigation panel displays the objects in InfoView by the folders in which they are located or the categories to which they are assigned.

5. In the "On my desktop" area, specify the maximum number of objects that you want to see displayed per page in the Workspace panel.

6. In the "For each document, show me" area, select the summary information that you want to see in the Workspace panel for the objects that you view:

   - Description
   - Owner
   - Date
   - Instance Count
   - Actions and Descriptions (if selected) initially not hidden

7. In the “View my documents” area, select how you want to view your documents.
8. In the “When I close my browser window” area, choose whether or not you want InfoView to log you off automatically when you close the web browser.
9. In the “My interface locale is” area, select your current location.

   This setting determines the language set and date format that is used by InfoView.
10. In the “My current time-zone is” area, select the appropriate time zone.

    NOTE: It is important that you check this setting before you schedule any objects to run. The default time zone is local to the web server that is running SRM Report Optimizer, not the Central Management Server (CMS) machine(s) to which each user connects. By properly setting your time zone, you ensure that your scheduled objects are processed in accordance with the time zone in which you are working.

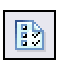
11. Click **OK**.

Desktop Intelligence preferences

This section describes how to select a view format for Desktop Intelligence documents.

To select a view format for Desktop Intelligence documents

1. Log on to InfoView.



2. On the Header panel toolbar, click **Preferences**.

   The Preferences appears.
3. Click the **Desktop Intelligence Document** tab.
4. In the “Select a view format” area, select the format that you want to use when you view your Desktop Intelligence documents:
   - If you want to be able to view the documents and respond to prompts, then choose HTML.
   - If you want to be able to view and print the documents, then choose Portable Document Format (Adobe Reader required).
   - If you want the documents to open in Desktop Intelligence, then choose BusinessObjects format (Windows only). Note that Desktop Intelligence must be installed on the local machine to for this option to work.
5. Click **OK**.

OLAP Intelligence preferences

This section describes how to select a viewer for OLAP Intelligence reports.

To select an OLAP Intelligence viewer

1. Log on to InfoView.

2. On the Header panel toolbar, click **Preferences**.

   The Preferences appears.
3. Click the **OLAP Intelligence** tab.

4. In the “View my OLAP Intelligence reports using the” area, select the viewer that you want to use when you view your OLAP Intelligence reports:
   - If you want to use ActiveX features and functionality to view your reports, then choose ActiveX Viewer.

     The necessary ActiveX controls are automatically installed on your computer when you click to view an OLAP Intelligence report for the first time. Typically, the ActiveX viewer is faster than the DHTML viewer.
   - If you want to use the web browser to view your reports, then choose DHTML Viewer.

     The DHTML viewer provides more toolbar options than the ActiveX viewer.
5. Click **OK**.

Crystal Reports preferences

Before you work with Crystal reports in InfoView, it is recommended that you set the Crystal Reports preferences to suit your reporting needs. See the following sections for more information:

- ”Selecting your Crystal report viewer” on page 16
- ”Description of the Crystal report viewers” on page 17

Selecting your Crystal report viewer

To select a Crystal report viewer

1. Log on to InfoView.

2. On the Header panel toolbar, click **Preferences**.

   The Preferences appears.
3. Click the **Crystal Report** tab.
4. In the “View my reports using the” area, select the viewer that you want to use when you view your Crystal reports:
   - **ActiveX viewer**

     The ActiveX viewer is enabled if you have installed Microsoft Internet Explorer versions that support ActiveX controls. For more information, see ”ActiveX viewer” on page 18.
   - **DHTML viewer**

     The DHMTL viewer is a zero-client viewer for browsers that support Dynamic HTML. For more information, see ”DHTML viewer” on page 19.
   - **Advanced DHTML viewer**

     In addition to providing all of the features of the DHTML viewer, the Advanced DHTML viewer includes an Advanced Search Wizard that allows searches that use Boolean operators. For more information, see ”Advanced DHTML viewer” on page 19.
   - **Java viewer**

The Java viewer is designed for web browsers that support the Java Virtual Machine. For more information, see "Java viewer" on page 21.

5. If you selected the DHTML/Advanced DHTML viewer, in the "DHTML Viewer printing uses the" area, choose **Acrobat Reader printing control** or **ActiveX printing control (One click printing)**.

   If you choose Acrobat Reader printing control, the viewer exports the report to PDF format when you click Print. You can then print the PDF.

   If you choose ActiveX printing control (One click printing), you can print the report directly from the Crystal report viewer. Note that this option requires the installation of a small ActiveX component.

6. In the "Preferred measuring units for report page layout is" area, select **inches** or **millimeters**.
7. If you selected the DHTML/Advanced DHTML viewer, you must choose the resolution that you want to use in the "Rendering resolution (DHTML viewers)" area.
8. Click **OK**.

Description of the Crystal report viewers

The Crystal report viewers allow you to view reports, navigate through multiple pages, refresh data, drill down to see details behind charts and summarized data, select parameters, and so on. They also have powerful printing and exporting capabilities.

The online Crystal report viewers support ActiveX, Java, DHTML, and Advanced DHTML. Typically, your SRM Report Optimizer administrator selects the viewer type that is best suited to your company's needs. However, you can also manually select your preferred viewer type through the Crystal Reports preferences page. (For more information, see "Crystal Reports preferences" on page 16.)

You can view your reports by using any of the following Crystal report viewers:

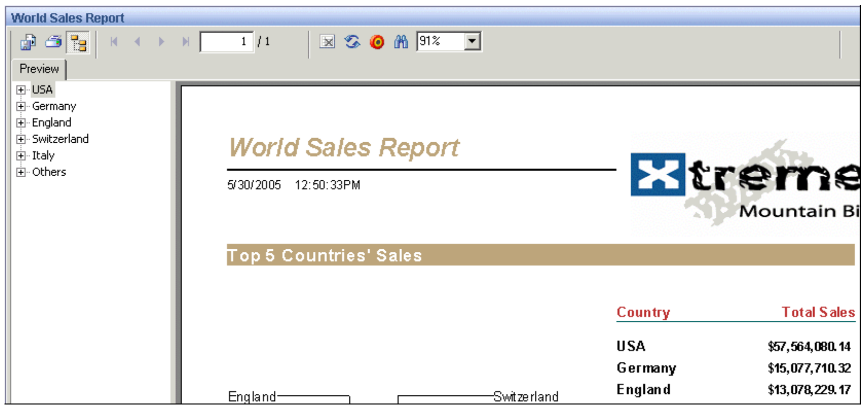
- "ActiveX viewer" on page 18
- "DHTML viewer" on page 19
- "Advanced DHTML viewer" on page 19
- "Java viewer" on page 21

You can also view your reports when you are not connected to SRM Report Optimizer. For more information, see the "Crystal Reports Offline Viewer" on page 70.

Note: Some features of the Crystal report viewers may be disabled by your SRM Report Optimizer administrator. Contact your administrator for more information.

ActiveX viewer

The ActiveX viewer can be accessed by using Microsoft Internet Explorer versions that support ActiveX controls. You can view, refresh, and print your reports and export them to a variety of formats.



In addition to the functions that are provided on the browser's standard toolbar, the ActiveX viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Toggle group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Stop loading
- Refresh
- Search text
- Zoom
- Close current view

Place the mouse pointer over any of the buttons on the custom toolbar to see the associated tool tip. For more information, see "Viewing Crystal reports" on page 65.

DHTML viewer

The DHTML viewer can be accessed by using a web browser that supports Dynamic HTML. You can view, refresh, and print your reports and export them to a variety of formats.

In addition to the functions that are provided on the browser's standard toolbar, the DHTML viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Drilldown view name
- Refresh page
- Search for text
- Zoom

For more information, see "Viewing Crystal reports" on page 65.

Advanced DHTML viewer

The Advanced DHTML viewer can be accessed by using a web browser that supports Dynamic HTML. You can view, refresh, and print your reports and export them to a variety of formats. In addition, the Advanced DHTML viewer provides an Advanced Search

Wizard, which enables you to perform a search on your report data by using Boolean operators.

In addition to the functions that are provided on the browser's standard toolbar, the Advanced DHTML viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Go to page
- Drilldown view name
- Refresh page
- Search for text
- Show/Hide Advanced Search Wizard
- Zoom
- Help

For more information, see "Viewing Crystal reports" on page 65.

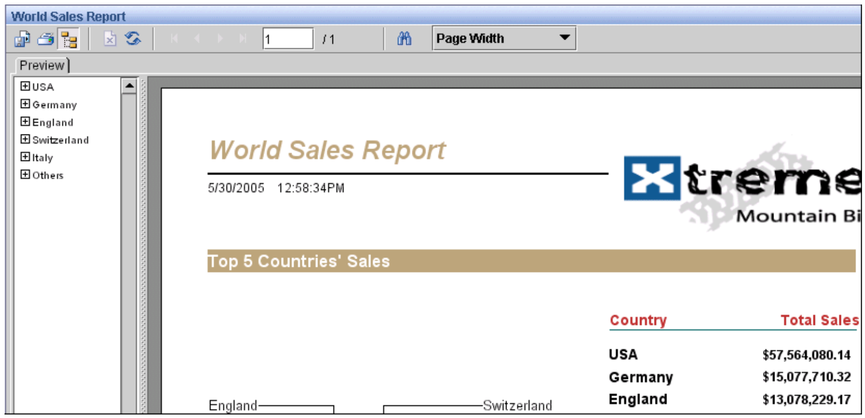
Note:

- The Advanced DHTML viewer contains its own help file—click the Help button on the custom toolbar for detailed information about the viewer's extra functions and the Advanced Search Wizard.
- Because the Advanced Search Wizard accesses the data source of the report, you must have at least View On Demand rights (or higher) in SRM Report Optimizer to use the wizard.

- Depending on how your SRM Report Optimizer administrator has set up the reports in the system, in some cases, you may not have the Advanced Search Wizard available in your viewer.

Java viewer

The Java viewer can be accessed by using a web browser that supports the Java Virtual Machine. You can view, refresh, and print your reports and export them to a variety of formats.



In addition to the functions that are provided on the browser's standard toolbar, the Java viewer has extra functions on its custom toolbar:

- Export report
- Print report
- Show/Hide group tree
- Stop
- Refresh data
- Go to first page
- Go to previous page
- Go to next page
- Go to last page
- Current and last page numbers
- Search for text
- Magnification factor

When you place the mouse pointer over a button on the custom toolbar, the associated description appears in the bottom left-hand side of the browser's status bar. For more information, see "Viewing Crystal reports" on page 65.

Note: You may experience minor problems when you scroll through reports in the Java viewer. These problems are the result of the implementation of the Java Virtual Machine in certain web browsers. If you experience such problems, click repeatedly on the scroll buttons to scroll. Do not hold the scroll buttons down.

Web Intelligence preferences

Before you access your Web Intelligence documents through InfoView, it is recommended that you set the Web Intelligence preferences to suit your query and reporting needs.

Note: The functionality described in this section is available through InfoView if you have appropriate Web Intelligence licenses. For information about licensing, contact your sales representative.

This process includes the following tasks:

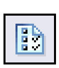
- "Selecting Web Intelligence view formats" on page 22
- "Selecting report panel formats" on page 23
- "Selecting your Drill options" on page 24
- "Selecting MS Excel formats" on page 26
- "Selecting a locale" on page 26
- "Selecting a default universe" on page 26

Selecting Web Intelligence view formats

You can choose different view formats to correspond with how you interact with information in Web Intelligence documents through InfoView.

To select a view format for Web Intelligence documents

1. Log on to InfoView.



2. On the Header panel toolbar, click **Preferences**.
   The Preferences appears.
3. Click the **Web Intelligence Document** tab.
4. In the "Select a view format" area, select the format that you want to use when you view your Web Intelligence documents:
   - If you want to be able to view the documents, respond to prompts, and/or perform drill analysis, then choose HTML.
   - If you want to be able to apply filters to the documents, do sorts and calculations, modify the format of the data in tables and charts, and/or perform drill analysis, then choose Interactive.

NOTE:

  - This option is available only if you have Web Intelligence deployed in JSP mode.
  - To be able to use the Web Intelligence HTML Query panel to create documents and/or edit queries, it is recommended that you select this option. If you do not select the Interactive view format, you can still use the HTML Query panel to define your documents, but you will not be able to format them.

- If you want to be able to view and print the documents, then choose Portable Document Format (Adobe Reader required).

5. Click **OK**.

Selecting report panel formats

The report panel provides several tools that enable you to create and/or edit Web Intelligence documents. Depending on how your system is configured or how you want to interact with Web Intelligence documents, a specific report panel format may be more suited to your needs.

To select a report panel

1. In the “Select a report panel” area, select the report panel that you want to use when you create or edit Web Intelligence documents:

   NOTE: These options are available only if your administrator has deployed Web Intelligence in JSP mode.

   - If you want to work with queries in an HTML environment, then choose Query – HTML.

     Query – HTML allows you to define the content of documents from multiple data sources. You can use Query – HTML to create new documents or modify the queries on which existing Web Intelligence documents are based.
   - If you want to use a graphical editor to build formulas, then choose Java Report Panel.

     This option enables you to use the Formula Editor, which lets you drag and drop variables to create formulas.
   - If you want to use a wizard-like interface to build your documents, then choose HTML Report Panel.

     The HTML Report Panel allows you to build query and report features through a simple interface. Each document that you create is based on a single data source and can contain multiple reports that display different subsets of information. The HTML Report Panel can be customized for special deployments.

2. Click **OK**.

Selecting your Drill options

Before you begin a drill session, you must specify how your Web Intelligence documents change when you perform a drill.

To set your drill options

1. In the "Select a view format" area, ensure that either **HTML** or **Interactive** is selected.
2. In the "For each new drill session" area, select the option that you want to apply to your drill sessions:
   - If you want to retain a copy of the original document so that you can compare the drilled results to the data in the original document, then choose Start drill on a duplicate report.

     InfoView creates a duplicate of the original report. When you end drill mode, both the original report and the drilled report remain in the document for you to view.
   - If you want to drill on the report so that the report is modified by your drill actions, then choose Start drill on the existing report.

     When you end drill mode, the report displays the drilled values.
3. In the "General drill options" area, select the general options that you want to apply to your drill sessions:
   - If you want Web Intelligence to prompt you whenever a drill action requires a new query to add more data to the document, then select Prompt if drill requires additional data.

     For example, when you drill the results that are displayed on a Web Intelligence document, you may want to drill to higher or lower-level information that is not included in the scope of analysis for the document. In this situation, Web Intelligence needs to run a new query to retrieve additional data from the data source. You can choose to be prompted with a message whenever a new query is needed.

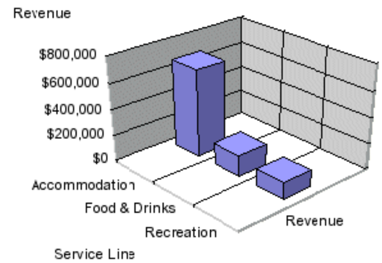
     The prompt message asks you to decide whether or not you want to run the additional query. In addition, the prompt may allow you to apply filters to the extra dimensions that you include in the new query. As a result, you can restrict the size of the query to just the data that is necessary for your analysis. Note, however, that you need permission from your administrator to drill out of the scope of analysis during a drill session.
   - If you want Web Intelligence to synchronize drilling on all report blocks, then select Synchronize drill on report blocks.

     Each table, chart, or free-standing cell in a report represents a specific block of data. There are two ways to drill on a report with multiple report blocks:
     - Synchronize drill on report blocks.
     - Drill on only the selected block.

     The following examples show how each option affects a report as you drill down on a table to analyze detailed results per service line.

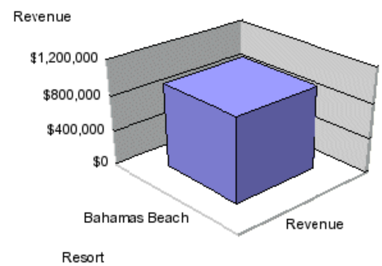
In the first example, Synchronize drill on report blocks is selected, so both the table and the chart display the drilled values:

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



In the second example, Synchronize drill on report blocks is not selected, so only the table displays the drilled values:

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



- If you want Web Intelligence to hide the Drill toolbar when you switch to drill mode, then select Hide drill toolbar.

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

  For example, if you drill on year 2001, the results that are displayed on the drilled table are the Q1, Q2, Q3, and Q4 for year 2001. This means that the quarterly values to which you drilled to are filtered by 2001. The Drill toolbar displays "2001", the value that filters the drilled results.

  The Drill toolbar allows you to select other values to filter the results differently. For example, if you use the Drill toolbar to select "2002", then the results that are displayed on the drilled table will be Q1, Q2, Q3, and Q4 for year 2002.

  If the drilled report includes dimensions from multiple queries, a tooltip appears when you rest your cursor on the value that is displayed on the filter. The tooltip displays the name of the query and the dimension for the value.

  You can choose to hide the Drill toolbar when you start drill mode. This is useful if you do not want to select filters during your drill session.

4. Click **OK**.

Selecting MS Excel formats

This option determines the appearance of the data in instances of Web Intelligence documents if you schedule the documents to run in MS Excel format.

To select an MS Excel format

1. In the “Select MS Excel format” area, select the Excel format that you want to use:
   - If you want to display the data in a format that is similar to working in Excel, then choose “Prioritize the format of reports in the Excel document”.
   - If you want to display the data in a text format, then choose “Prioritize easy data processing in the Excel document”.
2. Click **OK**.

Selecting a locale

The locale setting determines the language set and date format that Web Intelligence uses when you work with your documents.

To select a locale

1. From the “Select a format locale” list, select your current location.
2. In the “When viewing a document” area, choose one of the following options:
   - If you want to use the locale setting that was specified when the Web Intelligence document was created, then choose Use the document locale to format the data.
   - If you want to use the locale setting that you specified in InfoView (see ”General preferences” on page 13), then choose Use my formatting locale to format the data.
3. Click **OK**.

Selecting a default universe

You can specify a universe to be used as the default data source for your Web Intelligence documents.

To select a universe

The Preferences appears.

1. Click the **Web Intelligence Document** tab.
2. In the “Select a default Universe” area, click **Browse**, and choose one of the following options:
   - If you want to select a default universe for Web Intelligence to use when you create documents, then select a universe from the list.
   - If you do not want to set a default universe, then choose No default universe.
3. Click **OK**.

Changing your password

You can change the password that you use to log on to InfoView.

To change your password

1. Log on to InfoView.
2.  On the Header panel toolbar, click **Preferences**.
3. Click the **Password** tab.

   The Password page appears.
4. Type your old password.
5. Type your new password, confirm it, and then click **Submit**.

You must use the new password the next time that you log on to InfoView.

3 Working with Objects

Overview

This chapter describes how to access, organize, and work with objects in InfoView.

Navigating through folders or categories

Folders and categories are used to organize objects in InfoView.

To navigate through folders or categories

1. In the Navigation panel, click **Show Folders** or **Show Categories** to view the folders/categories that are available to you in InfoView.
2. Expand a folder/category to view any subfolders/subcategories.

> **NOTE:** To expand a folder/category, click the plus symbol beside the folder/category name.

3. Click a folder/category to view the objects that are in the folder or assigned to the category.

For more information about folders and categories, see "Organizing objects" on page 31.

Accessing objects in your personal folders or inbox

To access your folders or your Inbox

1. On the Navigation panel toolbar, click **Show Folders**.

   InfoView folders are displayed in the Navigation panel. By default, My Folders and Public Folders are displayed.
2. Expand **My Folders**.
3. Click **Favorites** or **Inbox**.

Viewing objects

Viewing objects includes the following tasks:

- "Selecting which objects to display" on page 30
- "Searching for objects" on page 30
- "Selecting which objects to display" on page 30
- "Opening objects for viewing" on page 30

Selecting which objects to display

By default, when you click to view the contents of a folder or category, InfoView shows you all of the objects that you have the rights to see. If you want to limit the type of objects that are displayed to make a search easier, then you can choose to display only objects of a specific type. Object types include Crystal reports, Web Intelligence documents, Excel spreadsheets, PowerPoint presentations, program objects, text files, and many others.

To select the type of objects that are displayed

1. On the Workspace panel toolbar, click **Filter**.
2. Select the type of object that you want to see.

NOTE: To see all of the objects again, select All Types from the Filter list.

Searching for objects

You can do a structured search to find objects in InfoView. A search is performed in your Favorites folder and all the public folders that you have the rights to view.

To search for an object

1. On the Header panel toolbar, type the word(s) that you want to locate in the **Search** field.
2. Click the list beside the search field to specify your search parameters with the following criteria:
   - all fields
   - title
   - keyword

   You can also click Advanced Search to see additional options that allow you to search for objects by location, description, owner, type, and the time when an object was last modified.
3. Click **Execute search**.

   A list of objects that match your search parameters appears.

Opening objects for viewing

If you have View On Demand rights in SRM Report Optimizer, and you click to view a Crystal report, a Web Intelligence document, or a Desktop Intelligence document, then the system displays the object with the most up-to-date data from the object's data source. If you do not have View On Demand rights, then you can view the latest available instance of the object or any historical instances. For more information about object instances, see "Scheduling objects" on page 33.

To view an object

1. Navigate to an object, and click its title to open it.

2. To view the latest instance of an object, click the **View Latest Instance** link under the object’s name. To view an older instance, click the **History** link, and then click the instance that you want to view.

NOTE: If these links are not visible, click the arrow beside the object’s title to show all of the actions that are available for it.

For more information about viewing objects and object instances, see ”Scheduling objects” on page 33 and ”Viewing object history” on page 41.

Changing viewers

Depending on the objects that you want to view, several viewers may be available for you to use. For more information about object viewers and how to change them, see ”Setting Preferences” on page 13.

Organizing objects

Organizing objects includes the following tasks:

- ”Creating folders or categories” on page 31
- ”Adding objects to a folder” on page 32
- ”Assigning objects to a category” on page 32
- ”Sorting objects” on page 32

Creating folders or categories

Folders and categories are typically created for you by your SRM Report Optimizer administrator. However, if you have the necessary rights, you can also create folders and/or categories for you to use in InfoView.

To create a folder or category

1. In the Navigation panel, click **Show Folders** or **Show Categories**.
2. Go to the folder/category where you want to add a new folder/category.
3. On the Header panel toolbar, click **New**, and select **Folder** or **Category**.

   The New Folder or New Category page is displayed.
4. Type a name for the new folder/category.
5. Optionally, you can type a description and/or a keyword for the folder/category.

   NOTE: You can use keywords to search for objects when you use the Search feature. For details, see ”Searching for objects” on page 30.

6. Click **OK**.

Adding objects to a folder

You can add objects to a folder by adding new objects to InfoView or, if you have the necessary rights, publishing objects to SRM Report Optimizer. For details, see "Adding new objects to InfoView" on page 44 and "Publishing Objects to SRM Report Optimizer" on page 77.

To add an object to a folder, you must have access rights to the folder.

Assigning objects to a category

Like folders, categories can be used to organize objects. You can assign objects to one or more categories, and you can create subcategories within categories.

SRM Report Optimizer includes two types of categories:

- **Personal categories**

  You can create any number of personal categories to organize your objects in InfoView. The categories that you create appear under Personal Categories in the Navigation panel.

- **Administrative categories**

  Administrative (or corporate) categories are typically created by the administrator or the users who have been granted access rights to these categories. If you have the appropriate rights, you can create administrative categories.

To assign an object to a category

1. Go to the folder that contains the object that you want to assign.
2. Click the **Properties** link of the object.

   NOTE: If the Properties link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

   The Properties page appears.
3. In the Categories area, select the categories to which you want to assign the object.
4. Click **OK**.

Sorting objects

By default, objects are sorted alphabetically by title. You can reverse this order, or you can sort the object by last run date, type, or owner.

In the Workspace panel, click the heading of the column by which you want to sort the objects. For example, to sort the objects by title, click the Title column heading. To sort the objects by date, click the Last Run column heading.

When you click the column heading, the system sorts the objects in ascending order. If you click the column heading again, it sorts the objects in descending order.

Scheduling objects

Scheduling an object allows you to run it automatically at specified times. When a scheduled object runs successfully, an instance is created. An instance is a version of the object that contains data from the time that the object was run.

You can see a list of instances by looking at an object's history, and you can view any of the instances. If you have the rights to view objects on demand, you can view and refresh any instance to retrieve the latest data from the object's data source.

By scheduling and viewing instances, you can ensure that the objects have the most up-to-date information available for viewing, printing, and distributing.

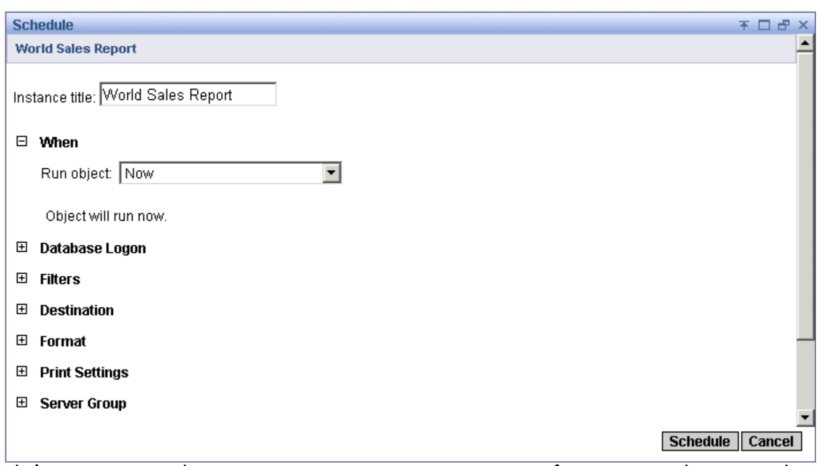
Note: Before you schedule objects, be sure to check your time zone setting on the Preferences page in InfoView. (See "Setting Preferences" on page 13.) The default time zone is local to the web server that runs SRM Report Optimizer, not the CMS to which users connect. Set the time zone to ensure that your scheduled objects are processed in accordance with the time zone in which you are working.

To schedule an object

1. Go to the folder that contains the object that you want to schedule, and click the object's **Schedule** link.

NOTE: If the Schedule link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

The Schedule page appears.



2. Specify the scheduling options that you want to use. For more information about each option, see the following sections:
   - "Instance title" on page 34
   - "When to run a scheduled object" on page 34

- "Database logon information" on page 35
- "Filters" on page 35
- "Destination locations" on page 35
- "Formats" on page 37
- "Print settings" on page 38
- "Server group settings" on page 39
- "Parameters" on page 39
- "Events" on page 40

NOTE: For some scheduling options, the settings that the administrator has specified for the object are already selected when you choose that option. You can schedule an object with these options or choose your own options.

3. Click **Schedule**.

Instance title

You can type a name to be used for each scheduled instance. Type the name in the Instance title field.

When to run a scheduled object

This option specifies a schedule for running an object. Each parameter in the Run object list has its own specific data entry requirements.

The following parameters are available:

- **Now**

  When you click Schedule, the object runs once (immediately).
- **Once**

  This option requires a start time parameter. The object runs once at the time that you specify.
- **Hourly**

  This option requires information in hours and/or minutes for how frequently the object is run. Instances are created regularly to match the parameters that you enter. The first instance is created at the start time that you specify.
- **Daily**

  This option requires a start time parameter. The object runs once every N days at the time that you specify.
- **Weekly**

  This option requires a start time parameter. Each week, the object runs on the selected days at the time that you specify.
- **Monthly**

This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N months.

- **Nth Day of Month**

  This option requires a day of the month on which the object is run. Instances are created regularly each month on the day that you enter at the start time that you specify.

- **1st Monday of Month**

  This option requires a start time parameter. An instance is created on the first Monday of each month at the time that you specify.

- **Last Day of Month**

  This option requires a start time parameter. An instance is created on the last day of each month at the time that you specify.

- **X Day of Nth Week of the Month**

  This option requires a start time parameter. An instance is created monthly on a day of a week that you specify.

- **Calendar**

  This option allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the SRM Report Optimizer administrator.) An instance is created on each day that you specify in the calendar.

Database logon information

Some objects require you to log on to a database before you can successfully schedule them. You can do this on the Schedule page if you have credentials for the object's data source.

To schedule an object with database logon information

1. On the Schedule page, expand the **Database Logon** option.
2. If necessary, change the logon information for the object's data source.
3. Set any other scheduling parameters as required, and then click **Schedule**.

Filters

If an object includes a record or group selection formula, you can modify it before you schedule it. Selection formulas help determine what data appears in a report and may improve performance by eliminating unwanted records.

To schedule an object with a record selection formula

1. On the Schedule page, expand the **Filters** option.
2. Change the record or group selection formula as necessary.
3. Set other scheduling parameters as required, and then click **Schedule**.

Destination locations

You can schedule an object instance to be sent to a specific destination on your computer, on a network, a default file location, email, or FTP. If your administrator has specified a particular destination for the object, this destination option is displayed. You may be able to update the fields for this destination, or select a different destination. For many of these destinations, you must provide additional information.

- **Default Enterprise location**

  If you select this option, the instance is saved to the default SRM Report Optimizer location (the Output File Repository Server).

- **Inbox**

  This option saves the instance to the Output File Repository Server and to inboxes as specified:

  - If you select the Use the Job Server's defaults option, copies of the instance are saved to the inboxes that are configured on the job server.
  - If you do not select Use the Job Server's defaults option, you can specify the inboxes where you want to save the instance.

- **File location**

  This option saves the instance to the Output File Repository Server and to the specified file location:

  - If you select the Use the Job Server's defaults option, copies of the instance are saved to the unmanaged disk location that is configured on the job server.
  - If you do not select Use the Job Server's defaults option, a copy of the instance is saved to the file location that you specify.

- **FTP server**

  This option saves the instance to the Output File Repository Server and to the specified FTP server:

  - If you select the Use the Job Server's defaults option, a copy of the instance is saved to the FTP server that configured on the job server.
  - If you do not select the Use the Job Server's defaults option, you can specify the FTP server where you want to save the instance.

- **Email recipients**

  This option saves the instance to the Output File Repository Server and to the specified email recipients:

  - If you select the Use the Job Server's defaults option, copies of the instance are emailed to the email recipients that are configured on the job server.
  - If you do not select the Use the Job Server's defaults option, you can specify the recipients to whom you want to email copies of the instance.

Note: If you select any option other than "Default Enterprise Location" and choose to use the job server's default option, then the location must already be configured on the appropriate job server by your administrator. For more information, see the *SRM Report Optimizer Administrator's Guide*.

To specify a destination

1. On the Schedule page, expand the **Destination** option.
2. In the **Destination** list, select the destination of your choice.
3. If you do not select the Use the Job Server's defaults option, enter the necessary information for the destination that you chose.

   For example, if you do not select the Use the Job Server's defaults option for Inbox, then you have to specify the user or user group to whom you want to send the instance of the object that you are scheduling.
4. Set other scheduling parameters as required, and then click **Schedule**.

Formats

Depending on the type of object that you choose to schedule, you can select the format in which the object's instance is saved when it is generated by SRM Report Optimizer.

Crystal report formats

For Crystal reports, you can select from the following formats:

- Crystal Reports
- Excel
- Excel (Data Only)
- Word
- Acrobat
- Rich Text
- Plain Text
- Paginated Text
- Tab-separated Text
- Tab-separated Values
- Character-separated Values

Note:

- When you select a file format other than Crystal Reports (.rpt), the program attempts to preserve as much of the formatting as the export format allows. However, you may lose some or all of the formatting that appears in the report.
- The difference between Excel and Excel (Data only) is that the Excel option attempts to preserve the look and feel of your original report, while the Excel (Data only) options saves only the data, and each cell represents a field.
- The Tab-separated Values format places a tab character between values; the Character-separated Values format places a specified character between values. These two formats produce data lists. In contrast, the Tab-separated Text format attempts to preserve the formatting of the report.

Web Intelligence document formats

For Web Intelligence documents, you can select from the following formats:

- Web Intelligence
- Microsoft Excel
- Adobe Acrobat

Desktop Intelligence document formats

For Desktop Intelligence documents, you can select from the following formats:

- Default Publication Format
- Adobe Acrobat
- HTML
- Microsoft Excel
- Rich Text
- Text

Publications formats

For Publications, you can select from the following formats:

- Desktop Intelligence
- Microsoft Excel
- Adobe Acrobat

To specify an instance format

1. On the Schedule page, expand the **Format** option.
2. In the **Format** list, click the format of your choice.
3. Select additional formatting options as required.

   Some format options require you to specify additional formatting options. These options vary, depending on the format that you selected.
4. Set other scheduling parameters as required, and then click **Schedule**.

Print settings

When you schedule a Crystal report or a Desktop Intelligence document, you can choose to print the object instance once it has been generated. See the following sections:

- To set the print settings for a Crystal report
- To set the print settings for a Desktop Intelligence document

To set the print settings for a Crystal report

1. On the Schedule page, expand the **Print Settings** option.
2. To print the report, select Print a copy of the report in Crystal Reports format when scheduling check box. If you do not want the report to be printed, ensure that the Print a copy of the report in Crystal Reports format when scheduling check box is not selected.
3. If you chose to print the report, then specify the additional print settings.
4. Set other scheduling parameters as required, and then click **Schedule**.

To set the print settings for a Desktop Intelligence document

1. On the Schedule page, expand the **Print Settings** option.
2. Select the **Enabled** option if you want to enable the settings that you specify (in step 3).
3. Select the **Default Printer** option to specify your system's default printer, or select **Specify the Printer** and provide the appropriate printer information accordingly.

Server group settings

When you schedule an object, you can select the server group that is used by the system to run the object.

To set the server group settings

1. On the Schedule page, expand the **Server Group** option.
2. Select the server group option you want:
   - **Use the first available server**

     This is the default option. SRM Report Optimizer uses the server that has the most resources free at the time of scheduling.
   - **Give preference to servers belonging to the selected group**

     Select a server group from the list. This option attempts to process the object from the servers that are found within your server group. If the specified servers are not available, then the object is processed on the next available server.
   - **Only use servers belonging to the selected group**

     This option ensures that SRM Report Optimizer uses only the specified servers that are found within the selected server group. If all of the servers in the server group are unavailable, then the object is not processed.
3. Set other scheduling parameters as required, and then click **Schedule**.

Parameters

Some objects make use of the parameters feature. Parameters prompt the user to enter information. For report objects, this information may determine what data appears in the report. For example, in a report that is used by sales, there may be a parameter that asks the user to choose a region. When the user chooses a region, the report displays the results for that specific region instead of displaying the results for all of the regions in the report.

Note: In Web Intelligence documents, parameters are called prompts.

You can set parameters on the Schedule page. If the object that you schedule does not contain parameters, then the Parameter option does not appear on the Schedule page.

To schedule an object with parameters

1. On the Schedule page, expand the **Parameters** option.

NOTE: The appearance of the parameter prompts on the Schedule page may differ from object to object, depending on how the parameter field was created. Program objects may provide an Argument field instead.

2. Set scheduling parameters as required, and then click **Schedule**.

Events

Event-based scheduling provides you with additional control when you schedule objects: you can configure the system so that objects are run only after a specified event occurs. Working with events consists of two steps: creating an event and scheduling an object. That is, once you create an event, you can select it as a dependency when you schedule an object. The scheduled job is then processed only when that event occurs.

You create events in Central Management Console (CMC), and then select the events in InfoView when you schedule objects. For more information about creating events and the CMC, see the *SRM Report Optimizer Administrator's Guide*.

To schedule an object with events

1. On the Schedule page, expand the **Events** option.
2. To specify an event to trigger the scheduled object, select the event in the Available Events pane, and then click **>**.
3. To schedule another event to trigger on completion, click the schedule event in the Available Schedule Events pane, and then click **>**.
4. Set other scheduling events as required, and then click **Schedule**.

Pausing or resuming an instance

You can pause and resume an object's instance as needed. For example, if a SRM Report Optimizer job server is down for maintenance reasons, you may want to pause a scheduled instance to prevent the system from running the object because the object fails when the job server is not running. When the job server is running again, you can resume the scheduled object.

Note: Pause and resume can be applied only to scheduled instances; that is, they can be applied only to objects that have a status of Pending or Recurring.

To pause and resume an instance

1. Go to the folder that contains the object, and click the object's **History** link.

NOTE: If the History link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

The History page appears.

2. Select the check box for the scheduled instance you want to pause.
3. Click **Pause**.

To resume an instance after pausing it

1. Go to the folder that contains the object, and click the object's **History** link.
2. Select the check box for the paused instance you want to resume.
3. Click **Resume**.

Viewing object history

Viewing object history includes the following tasks:

- "Viewing instances of objects" on page 41
- "Deleting an instance" on page 42
- "Sending objects or instances" on page 43

Viewing instances of objects

You can view the instances of objects such as Crystal reports, Web Intelligence documents, Desktop Intelligence documents, and object packages.

To view object instances

1. Go to the folder that contains the object that you want to view.
2. To view the latest instance of the object, click the **View Latest Instance** link under the object's name.

   NOTE:

   - To view an older instance of the object, click the History link, and then click the link of the instance that you want to view.
   
   - If the View Latest Instance and/or History link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

   The object appears in its associated viewer.

3. If you have View On Demand rights in SRM Report Optimizer, you can click **Refresh Page** in the report/document viewer toolbar to refresh the report/document with the latest data from its data source.

Viewing historical instances

SRM Report Optimizer saves a history of object instances for scheduled objects that have been run. The history list is arranged chronologically (with the most recent instances listed first) and can contain the following information:

- Instance Time
- Title
- Run By
- Parameters

- Format
- Status
- Reschedule

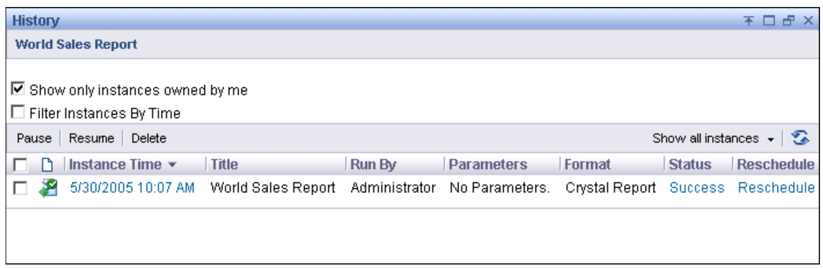
Note: The information that is available depends on the type of object that you are viewing. For example, the history page for Desktop Intelligence documents includes Arguments instead of Parameters, and the history page for object packages includes fewer columns.

To view the history of an object

1. Go to the folder that contains the object, and click the object's **History** link.

   NOTE: If the History link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

   The History page appears.

   You can choose to display all of the available instances or only the instances that you own by selecting the appropriate option from the check boxes on the upper left corner.
2. Click a link under the **Instance Time** column to view an object instance.

   NOTE: Sort instances chronologically by clicking the Instance Time column heading. Click the column heading again to reverse the sort order. You can also sort the instances by owner and status by clicking the appropriate column headings.

When you click to view an object instance, the instance opens in a viewer that corresponds to the object type.

Deleting an instance

You can delete the instances of any object as needed.

To delete an instance

1. Go to the folder that contains the object, and click the object's **History** link.

NOTE: If the History link is not visible, click the arrow beside the object's title to show all of the actions that are available for the item.

The History page appears.

2. Select the check boxes of the instances that you want to delete.
3. Click **Delete**.

Sending objects or instances

You can use the Send feature to send existing objects or instances of objects to different locations. You can also send copies of the object/instance or shortcuts to the object/instance.

To send an object/instance to a location

1. Go to the folder that contains the object that you want to send.
2. Select the check boxes of the objects that you want to send.

NOTE: To send an instance, click the History link of the object, and select the check boxes of the instances that you want to send. Select only the instances with a status of Success or Failed. (Instances with a status or Recurring or Pending are scheduled and do not contain any data yet.)

3. From the Send list on the Header panel toolbar, select the location where you want to send the object/instance:
   - SRM Report Optimizer Inbox
   - Email
   - FTP Location
   - File Location

   Not all types of objects can be sent to all destinations. For more information, see "Destination locations" on page 35.

   The Send page appears.
4. Specify the additional information as required.

   For example, if you selected to send the object to a SRM Report Optimizer Inbox, you must select which users you want to send the object to.
5. Click **Submit**.

   The system sends the objects or instance to the specified destination.

Note: When you use the Send feature, the system does not refresh the data in the reports. Instead, it sends the existing object, for example, a Word file, or the existing report instance to the destination.

Adding new objects to InfoView

In addition to working with the objects that your administrator and/or other authorized users have added to InfoView, if you have the necessary rights, you can also create your own objects to add to InfoView.

To add a new object to InfoView, on the Header panel toolbar, click New, and select the type of object that you want to create. Depending on the type of object that you selected, the instructions for creating the object may be different. For example, Web Intelligence documents can be created directly from within the web browser by selecting an available universe, while OLAP Intelligence reports require you to create a connection to an OLAP server before you can create the report.

For instructions on how to create specific object types, see the following chapters:

- "Working with OLAP Intelligence Reports" on page 113
- "Working with Web Intelligence Documents" on page 73

As well, for additional information, consult the *SRM Report Optimizer Administrator's Guide*, the *Crystal Reports User's Guide*, the *Building Reports with the Web Intelligence Report Panel* help, which is available when you view a Web Intelligence document.

You can also add existing objects to InfoView. For more information, see "Publishing Objects to SRM Report Optimizer" on page 77.

Setting object properties

If you have the necessary access rights, you can change the following properties for an object:

- Title
- Description
- Keywords
- Categories

To set the object properties

1. Go to the folder that contains the object that you want to modify, and click the object's the **Properties** link.

NOTE: If the Properties link is not visible, click the arrow beside the object's title to show all of the actions that are available for it.

The Properties page appears.

2. Change the title, description, or keywords for the object as needed.
3. In the Categories area, select any categories to which you want the object to be assigned.
4. Click **OK**.

4

Working with Dashboards

Overview

In InfoView, you can access My InfoView, a feature that allows you to create dashboards. A dashboard is a customized view that contains the objects (for example, reports, documents, and web sites) that a user views on a regular basis. These objects are displayed according to settings that are defined by the user. By using My InfoView, you can create a dashboard to personalize and enhance the way you view your objects in InfoView.

Creating a dashboard

You can create a dashboard to display the web sites, Crystal reports, Web Intelligence documents, and other objects that you frequently view in InfoView. To view the dashboard, go to the folder that contains the object and click its title. (The default name of a dashboard in InfoView is My InfoView and is, also by default, located in your Favorites folder.)

Note: You can make the dashboard your initial view in InfoView. For details, see "General preferences" on page 13.

To create a dashboard

1. Log on to InfoView.
2. On the Header panel toolbar, click **My InfoView**.

   The My InfoView page appears.

3. Choose a template.

   The templates include frames that determine the layout of the objects in your dashboard. Each box can contain one object.
4. Click **Define Content**.

The dashboard properties dialog box appears.

5. Select the objects that you want to include in the dashboard.

   For example, you can include a web address or an object. You can also specify a header and footer for each box.

6. Click **Save**.

   The system saves the dashboard as My InfoView. The default location of My InfoView is your Favorites folder.

Editing the dashboard

To edit the dashboard

1. On the Header panel toolbar, click **My InfoView**.

   NOTE: Alternatively, you can go to the folder that contains the dashboard, and click its title to open it.

   ---

2. Click **Edit**.
3. Make your changes to the dashboard.
4. Click **Save**.

5 Using Discussions

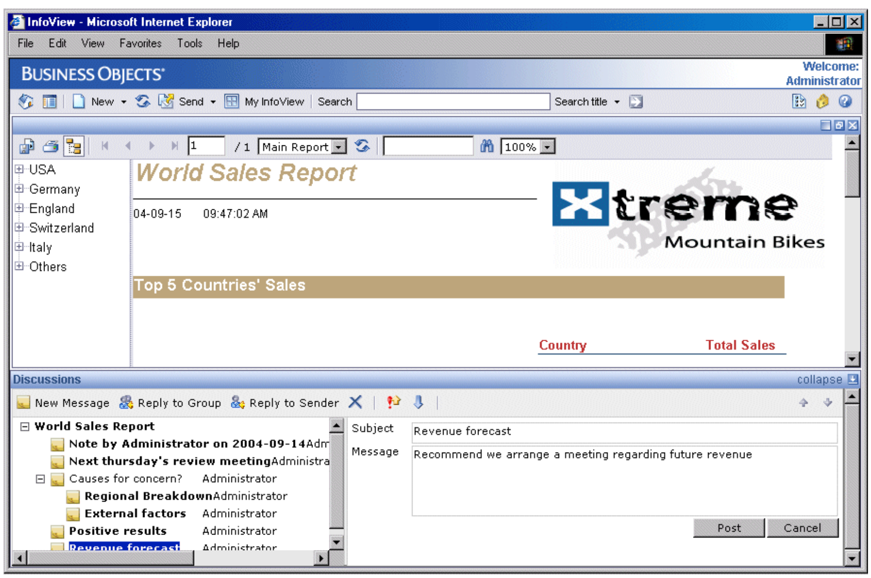
Overview

The Discussions feature enables you to create notes for reports, hyperlinks, programs, and other objects in InfoView. SRM Report Optimizer users who have the appropriate rights can view the notes or add their own comments to a discussion thread, which is a series of related notes in a hierarchical format. You can create a discussion thread or add notes to a discussion thread for any object to which you have access.

Note: You must have view rights on an object to be able to view that object and its associated notes. If you are not sure whether or not you have the appropriate rights, contact your SRM Report Optimizer administrator.

Using the Discussions panel

The Discussions panel contains the discussion notes and threads. The panel appears at the bottom of the InfoView window.



The example shows a Crystal report called World Sales Report. On the left side of the Discussions panel is a browser that shows all the notes that belong to the report. The root node is the title of the report. When a user adds a note, the title of the note appears beneath the title of the report. Users can then add to the note to form a discussion thread.

Accessing the Discussions panel

Click Show/Hide the Discussions Panel to expand/collapse the Discussions panel in InfoView.

Creating a note

You can add notes to any object to which you have viewing rights.

To add a note

1. Log on to InfoView.
2. Go to the folder that contains the object to which you want to add a note, and click its title to open it.
3.  Click Show the Discussions Panel to expand the Discussions panel.
4. Click **New Message**.
5. In the **Subject** field, type a heading for your note.

   NOTE: The maximum number of characters that you can use in this field is 255.

6. In the **Message** field, type your note.

   NOTE: The maximum number of characters that you can use in this field is 1000.

7.  Optionally, you can select a flag for your note. Click **High Importance** or **Low Importance**.
8. Click **Post**.

Replying to a note

On the Discussions panel, click the plus symbol to expand the hierarchy of notes that are related to the object. You can post a reply to the entire group or only to the person who posted the note. Notes that you have not yet read appear in bold.

To reply to a note

1. In the Discussions panel, select the note that you want to edit.
2. Click **Reply to Group** or **Reply to Sender**.

   NOTE: If you choose Reply to Group, your reply becomes available to everyone who has the right to view the notes that are associated with the object.

3. Edit the contents of the **Subject** field and/or the **Message** field.
4. Click **Post**.

Editing a note

You can edit the notes that you have created.

To edit a note

1. In the Discussions panel, select the note that you want to edit.
2. Edit the contents of the **Subject** field and/or the **Message** field.
3. Click **Post**.

Note: You cannot edit notes that were created by other users or notes that have replies in a discussion thread unless you have administrative rights.

Deleting a note

You can delete the notes that you have created.

To delete a note

1. In the Discussions panel, select the note that you want to delete.
2.  Click **Delete**.

Note: You cannot delete notes that were created by other users or notes that have replies in a discussion thread unless you have administrative rights.

6

BusinessObjects Enterprise XI Release 2 InfoView User's Guide

Using Encyclopedia

Overview

Encyclopedia provides business intelligence users with essential information about their reports. It enables users to answer the following questions:

- What is the purpose of the report?
- What business questions does it help answer?
- How is it best viewed?
- What terms are used in the report and what do they mean?
- What other reports are related to this one?
- What analysis has been used in the report, and how does it work?

Encyclopedia is designed for business user who work in InfoView. It can be used with SRM Report Optimizer objects, such as Crystal reports, OLAP Intelligence reports, Web Intelligence documents, Adobe Acrobat PDFs, Microsoft Excel documents, and so on.

Note: In Encyclopedia, the words *analytic* and *report* are synonymous.

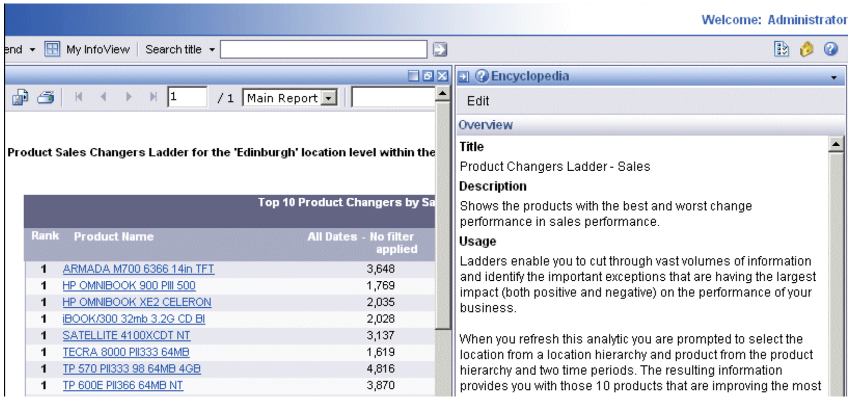
To use Encyclopedia, you must have a deployment of SRM Report Optimizer Premium.

Accessing Encyclopedia

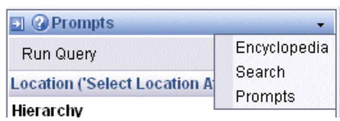
You access Encyclopedia from within InfoView. When you click to view an object, you can display the Encyclopedia panel to help you understand and interpret the contents of the object.

By default, the Encyclopedia panel is not displayed when you open an object. To view the panel, click Toggle Encyclopedia on the Header panel toolbar.

Encyclopedia appears on the right side of the screen.



Note: If the Prompts panel or Search panel appears instead of the Encyclopedia panel, click the panel arrow and select Encyclopedia.



Creating and maintaining Encyclopedia information

If you have the necessary rights in SRM Report Optimizer, you can make changes to the information in any of the four main parts of Encyclopedia. See the following sections:

- "Overview tab" on page 55
- "Business questions" on page 56
- "Glossary terms" on page 58
- "Guided analysis" on page 60

For information about your rights to modify Encyclopedia, contact your SRM Report Optimizer administrator.

Overview tab

The Overview tab is the first thing that is displayed on your screen when you open Encyclopedia.

The Overview tab contains the following information:

- **Title**

  The title of the object.
- **Description**

  A brief summary of the object. Users can read the description to determine whether or not the object is useful to them.
- **Purpose**

  A more detailed description of the object and its purpose.
- **Usage**

  An explanation of how to use the object. This information can include the meanings of terms that are used, instructions for the interpretation of charts, tables, and measures, a description of parameters/prompts, and information about any guided analysis that may be associated with the object. (For information about guided analysis, see "Guided analysis" on page 60.)

Editing overview information

To edit overview information

1. In the Encyclopedia panel, click **Edit**.
2. Click the **Overview** tab.

   NOTE: Resize the Encyclopedia panel to view all of the available edit options by dragging the left side of the panel towards the center of the screen.

3. Modify the information in the Overview fields.

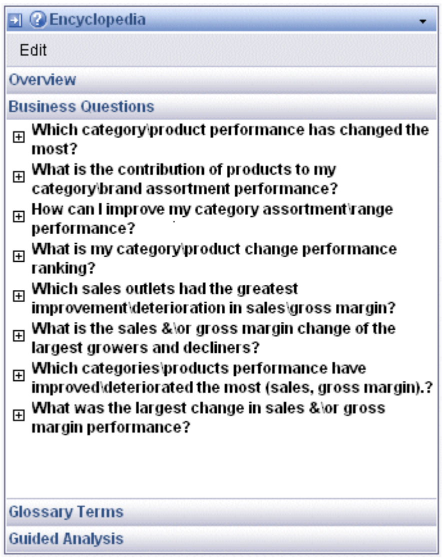
NOTE: Encyclopedia obtains the information about an object's title and description from the object itself, as defined in the Central Management Server. As a result, you cannot edit the title and description in the panel.

4. Click **OK**.

Business questions

A business question is a business-oriented query that is answered by one or more objects in InfoView. Business questions are linked to relevant objects; by selecting a question, users are given the choice of one or more objects that help answer the question.

Examples of business questions in the Business Questions tab are shown below:



From the Business Questions tab, you can do the following tasks:

- Display the list of objects that are associated with the business questions.
- Create a new business question
- Associate a particular business question with an object in InfoView
- Modify an existing business question
- Delete an existing business question

Creating a question

To create a business question

1. In the Encyclopedia panel, click the **Business Questions** tab.
2. At the bottom of the panel, type a new question in the Business Question field.
3. Click **New**.

Encyclopedia adds the question to the Available area.

NOTE: For this question to be useful to Encyclopedia users, you must associate it with one or more objects. See "Associating questions with an object" on page 57 for more information.

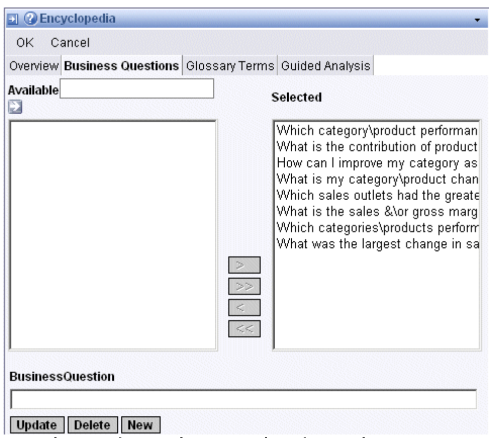
4. Click **OK**.

Associating questions with an object

To associate a business question with an object

1. In InfoView, open the object to which you want to associate a question.
2. In Encyclopedia, click **Edit**.

   The Edit page appears.
3. Click the **Business Questions** tab.



   The Selected area displays the questions that are already associated with the object.
4. Search for the questions you want to associate with the object by performing one of the following actions:
   - Type text in the text box above the Available area, and click Search. Encyclopedia displays a list of all the questions that contain the text that you entered.
   - Click Search without entering any text to display a list of all available questions.
5. You can add or remove questions associated with the object:
   - To associate a question with the object, click the question in the Available pane, and then click >.
   - To associate all available questions with the object, click >>.
   - To remove an associated question from the object, click the question in the Selected pane, and then click <.
   - To remove all associated questions from the object, click <<.
6. Click **OK**.

Editing a question

To edit a question

1. In the Available area, select the question you want to modify.
   The question is displayed in the Business Question text field.
2. Make your changes to the question.
3. Click **Update**.

NOTE: You cannot update a question that is in the Selected area.

Deleting a question

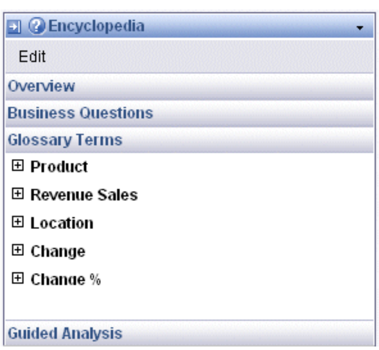
To delete a question

1. If the question that you want to delete is associated with the object that you are currently viewing, remove the association as described in "Associating questions with an object" on page 57.
2. In the Available area, select the question you want to delete.
3. Click **Delete**.
   Encyclopedia deletes the business question. This action deletes the question completely, so it is no longer available for any other objects with which it may have been associated. Therefore, do not delete a question from Encyclopedia unless you are sure there is no need for it to be associated with any other objects.

Glossary terms

A glossary term is a definition of a term that is used in the object. These definitions are maintained in Encyclopedia and are available to all users as they view objects and navigate around other related objects. Glossary terms are linked to relevant objects.

Examples of terms in the Glossary Terms tab are shown below:



From the Glossary Terms tab, you can do the following tasks:

- Display a tooltip description of a term by pointing your mouse at the term
- Display a list of objects with which the term is associated.

- Create a new glossary term
- Associate a particular glossary term with an object in InfoView
- Modify an existing glossary term
- Delete an existing glossary term

Creating a term

To create a glossary term

1. In the Encyclopedia panel, click the **Glossary Terms** tab.
2. At the bottom of the panel, type a new term in the Glossary Term field.
3. In the Description field, type a description for the term.
4. Click **New**.

   Encyclopedia adds the term to the Available area.

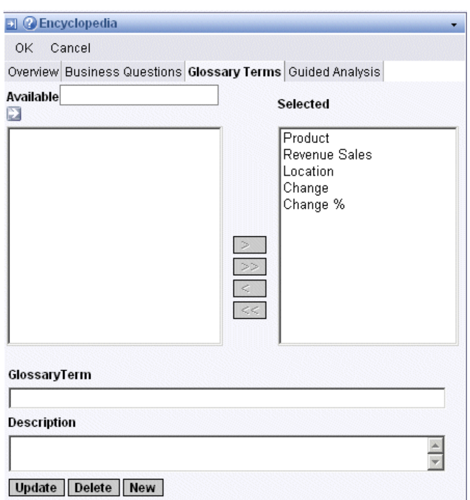
   NOTE: For this term to be useful to Encyclopedia users, you must associate it with one or more objects. See "Associating a glossary term with an object" on page 59 for more information.

5. Click **OK**.

Associating a glossary term with an object

To associate a glossary term with an object

1. In InfoView, open the object to which you want to associate a term.
2. In Encyclopedia, click **Edit**.
3. Click the **Glossary Terms** tab.



   The Selected area displays the terms that are already associated with the object.

4. Search for the terms that you want to associate with the object by performing one of the following actions:

- Type text in the text box above the Available area, and click Search. Encyclopedia displays a list of all the terms that contain the text that you entered.
- Click Search without entering any text to display a list of all available terms.

5. You can add or remove questions associated with the object:
   - To associate a question with the object, click the question in the Available pane, and then click >.
   - To associate all available questions with the object, click >>.
   - To remove an associated question from the object, click the question in the Selected pane, and then click <.
   - To remove all associated questions from the object, click <<.
6. Click **OK**.

Editing a term

To edit a term

1. In the Available area, select the term you want to modify.
   The term is displayed in the Glossary Term text field.
2. Make your changes to the term.
3. Click **Update**.

NOTE: You cannot update a term that is in the Selected area.

Deleting a term

To delete a term

1. If the term you want to delete is associated with the object that you are currently viewing, remove the association as described in "Associating a glossary term with an object" on page 59.
2. In the Available area, select the term you want to delete.
3. Click **Delete**.

Encyclopedia deletes the glossary term.

This action deletes the term completely, so it is no longer available for any other objects with which it may have been associated. Therefore, do not delete a glossary term from Encyclopedia unless you are sure that there is no need for it to be associated with any other objects.

Guided analysis

Guided analysis provides you with suggested navigation paths—or storylines—through objects in InfoView. When you view an object, a storyline suggests other objects that you may want to view and, if possible, displays a list of the objects in the storyline that lead to the current object that you are viewing.

An examples of a storylines in the Guided Analysis tab is shown below:

From the Guided Analysis tab, you can do the following tasks:

- Follow existing storylines
- Create a new storyline
- Modify an existing storyline
- Delete a storyline

Following a storyline

To follow a storyline

1. In the Encyclopedia panel, click the **Guided Analysis** tab.
2. Select the storyline you want to follow from the list.

   All the objects in the storyline appear in the order in which they occur, with the object that you are currently viewing clearly indicated.
3. Click the name of the object that you want to view.

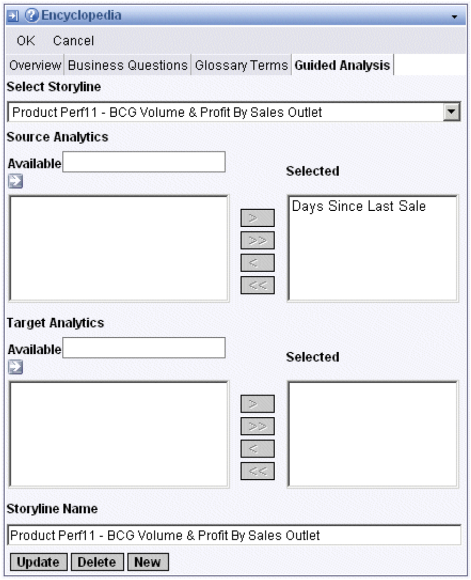
   The object appears in its associated viewer.

Creating a storyline

To create a storyline

1. In InfoView, open the object for which you want to create a storyline.
2. Click the **Guided Analysis** tab.

The Edit page appears.



3. In the Storyline Name field, type a title for the storyline.
4. Click **New**.

   Encyclopedia adds the storyline to the list.
5. Search for the objects that you want to add to the storyline by performing one of the following actions:
   - Type text in the field above the Available area, and click Search. Encyclopedia displays a list of all the objects that contain the text that you entered in their title.
   - Click Search without entering any text to display a list of all available questions.
6. Add or remove source objects from the storyline:

   NOTE: A *source* analytic is a report that links to the current report in the storyline; it occurs earlier in the storyline. A *target* analytic is a report to which the current report links; it occurs later in the storyline.

   - To add an object to the storyline, click the object's title in the Source Analytics Available pane, and then click >.
   - To add all available objects to the storyline, click >>.
   - To remove an object from the storyline, click the object's title in the Source Analytics Selected pane, and then click <.
   - To remove all objects from the storyline, click <<.
7. Use the Target Analytics panes to add or remove target objects from the storyline in the same way.
8. Click **OK**.

Editing a storyline

To edit a storyline

1. In the Available area, select the storyline you want to update.

   The storyline's name is displayed in the Storyline Name field and the objects that are associated with the storyline are displayed in the Selected areas.
2. Make your changes to the storyline name.
3. Click **Update**.
4. Change the objects that are associated with the storyline if required, as described in "Creating a storyline" on page 61.
5. Click **OK**.

Deleting a storyline

To delete a storyline

1. Select the storyline you want to delete from the list.
2. Click **Delete**.

   Encyclopedia deletes the storyline.

This action deletes the storyline completely, so it is no longer available from any of the other objects that formed part of the storyline. The objects themselves are not deleted.

7 Working with Crystal Reports

Overview

When you work with Crystal reports, you can use all of the InfoView features that are described in "Working with Objects" on page 29.

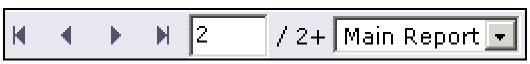
This chapter describes additional features that are unique to working with Crystal reports, such as drilling, viewing alerts, and distributing reports. It also describes the Crystal Reports Offline Viewer.

Viewing Crystal reports

When you click to view a Crystal report, the report is displayed in a viewer. Depending on the type of viewer that is deployed and the functions that are enabled by your SRM Report Optimizer administrator, you can perform a number of different activities. The following section provides information about the Crystal reports viewer toolbar and gives instructions on how you can use it to work with your reports.

Note: For information about the specific functions that are available in each viewer, see "Description of the Crystal report viewers" on page 17.

Crystal Reports viewer toolbar

Option	Description
	**Export this report** Exports the Crystal report to your local machine or to a location on a network.
	**Print this report** Prints the report.
	**Show/Hide Group Tree** Shows/hides the group tree. When the group tree is displayed, you can use it to navigate through the the data in your report.
	
	Navigation Allows you to move through the pages of a report. Go to Next Page, Go to Previous Page, Go to First Page, and Go to Last Page are available options.
	**Refresh Page** Obtains the most up-to-date data from the report's data source. You must have the necessary rights, and the report must contain the necessary data source information, before you can refresh the report.
	**Search for text** Allows you to search for the specific instance of a text.
	**Zoom** Allows you to zoom in or out on a report.

Drilling reports

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

To drill down Crystal reports

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

NOTE: You can also use the group tree and/or toolbar to navigate to different areas of the report.

Looking at alerts

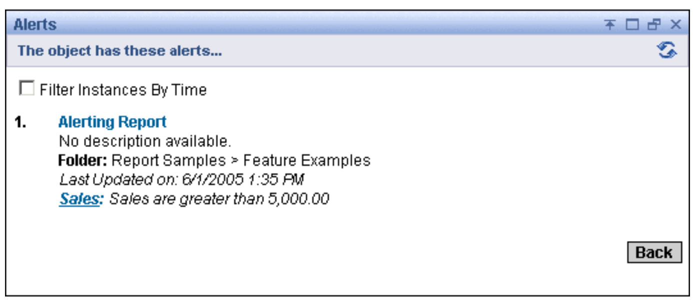
SRM Report Optimizer tracks report instances that trigger Alerts.

Alerts are custom messages that are created in Crystal Reports. When you view a report, they appear when certain conditions are met by report data. Alerts provide more information about the report data or prompt the user to perform an action.

To view alerts in Crystal reports

1. In InfoView, go to the folder/category that contains the Crystal report that you want to view.
2. Click **Alerts**.

   The Alerts page appears.



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

3. Click the title to launch the report instance in a Crystal report viewer.

Distributing reports

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

- Printing
- Exporting

Note: If you have the rights to schedule reports, you can also distribute reports by scheduling them directly to a disk location, an email, FTP, or a printer. For details, see "Destination locations" on page 35.

Printing reports

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

Note:

- Depending on the Crystal report viewer that you use, the steps that are detailed below may be different; however, the general principles for printing reports remain the same.
- If there are on-screen instructions that are provided, follow those instructions instead of the steps that are described below.

To print Crystal reports

1. Open the document that you want to view.

2. On the viewer toolbar, click **Print Report**.

   The Print dialog box appears.
3. In the Print range area, select all pages or type a specific range of pages.
4. In the Copies area, select the number of copies that you want to print.

   NOTE: If you select the Collate option, the pages are printed in order. (For example, if you are printing two copies of a report that has four pages, your report prints pages one, two, three, and four of the first copy, and then prints pages one, two, three, and four of the second copy.)
5. Click **OK**.

Exporting reports

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

Note:

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

Format types

SRM Report Optimizer provides you with several export format types:

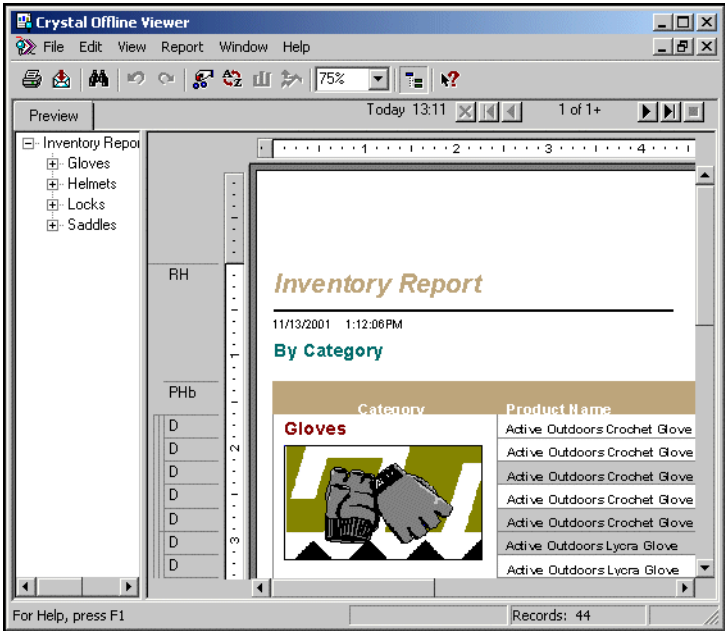
- Crystal Reports
- Microsoft Excel
- Microsoft Excel (Data only)
- Microsoft Word
- Rich Text Format
- Adobe Acrobat

Note:

- When you export a report to a file format other than Crystal Reports format (.rpt), you may lose some or all of the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.
- The difference between Excel and Excel (Data only) is that Excel attempts to preserve the look and feel of your original report.
- The Crystal Reports Offline Viewer provides other formats to which you can export your reports. For more information, see the *Crystal Reports User's Guide*.

Crystal Reports Offline Viewer

The Crystal Reports Offline Viewer is a report viewer that is installed locally on your computer. You can use this viewer to look at the Crystal reports that you have downloaded without being connected to SRM Report Optimizer.



The Crystal Reports Offline Viewer allows you to do the following tasks:

- Print or export your report.
- Select the data that you want to view.
- Drill down for more detail in the report.
- Sort the data in the report you want to view.
- View multiple reports.

The Crystal Reports Offline Viewer functions similarly to Crystal Reports. For more information about the tasks that you can perform with the Crystal Reports Offline Viewer (selecting records, sorting records, graphing, choosing Top N values, and so on), access the online help from the Crystal Reports Offline Viewer Help menu.

Installing the Crystal Reports Offline Viewer

Contact your administrator for a copy of the program that installs the Crystal Reports Offline Viewer. Once the viewer is installed, it resides locally as a client-side viewer.

To install the Crystal Reports Offline Viewer

1. Run the Crystal Reports Offline Viewer installation program that is provided by your administrator.
2. Follow the instructions on your screen and accept the default values when possible.

3. When the installation is done, click **Finish**.

Launching the Crystal Reports Offline Viewer

The Crystal Reports Offline Viewer is launched when you select a Crystal report (.rpt) file from your machine and double-click it.

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

8

Working with Web Intelligence Documents

Overview

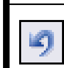
When you work with Web Intelligence documents, you can use all of the InfoView features that are described in "Working with Objects" on page 29.

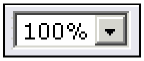
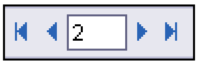
This chapter describes additional features that are unique to working with Web Intelligence documents, such as drilling, responding to prompts, and editing queries.

Viewing Web Intelligence documents

When you click to view a Web Intelligence document, the document appears in a viewer. Depending on the type of viewer that is deployed and the functions that are enabled by your SRM Report Optimizer administrator, you can perform a number of different activities. The following sections provide information about the Web Intelligence toolbar and give instructions on how to work with the navigation map, display user prompts, find text, and drill down data in your Web Intelligence documents.

Web Intelligence toolbar

Option	Description
	**Document actions** Allows you to edit or save the document.
	**View** Allows you to choose a view mode and show/hide the left panel.
	**Save** Saves the document.
	**Find** Allows you to search for text in the document.
	**Undo** Reverses the previous action.

Option	Description
	**Redo** Reverses the undo action.
	**Zoom** Allows you to zoom in or out on the document.
	**Navigation** Allows you to move through the pages of a document. Go to Next Page, Go to Previous Page, Go to First Page, and Go to Last Page are available options.
	**Refresh** Obtains the most up-to-date data from the document's data source. You must have the necessary rights, and the document must contain the necessary data source information before you can refresh the document.
	**Start/End Drill mode** Allows you to drill to data beneath charts.
	**Snapshot** Takes a picture of the screen during Drill mode. The picture is saved on a tab for you to view at a later time.

Displaying the navigation map

The navigation map allows you to navigate to the reports that are contained in your Web Intelligence document.

To display the navigation map

1. Open the document that you want to view.
2. Click **View**, and select **Left panel**.

3. From the left panel list, select **Navigation Map**.

Displaying user prompts

Prompts ask users to enter information. For Web Intelligence documents, this information may determine what data appears in the document. For example, in a document that is used by sales, there may be a prompt that asks the user to choose a region. When the user chooses a region, the document displays the results for that specific region instead of displaying the results for all of the regions in the document.

To display user prompts

1. Open the document that you want to view.

2. Click **View**, and select **Left panel**.
3. From the left panel list, select **User Prompt Input**.

Finding text in documents

You can search for text in your documents.

To find text

1. Open the document that you want to view.

2. Click **Find**.

   The Find options appear in the left panel.
3. In the **Find** field, type the text you want to locate.
4. Select **Match whole word** and/or **Match case**.
5. Select the direction of the search: **Up** or **Down**.
6. Click **Find Next**.

Drilling documents

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

To drill document data

1. Open the document that you want to view.

2. Click **Start Drill mode**, and then click links in the document to drill down to more information.

3. Click **Add Drill Filter**.

   Filter options appear in a list.
4. Select a filter to apply to your drill session.

5. Click **Snapshot** to take a picture of the drilled view.

   The snapshot is saved as a tab in the viewer.
6. Click the tab to view the snapshot.

7. Click **End Drill mode** to end the drill session.

Creating Web Intelligence documents

You can create Web Intelligence documents by selecting a universe in InfoView and building one or more queries to define the data content of the documents. Each universe maps to a database that contains business information. When you connect to a universe, Web Intelligence automatically launches the document editor that is selected in the Web

Intelligence Document preferences page in InfoView. For more information about the Web Intelligence Document preferences page, see "Setting Preferences" on page 13.

Selecting a universe for a new document

To select a universe for a new document

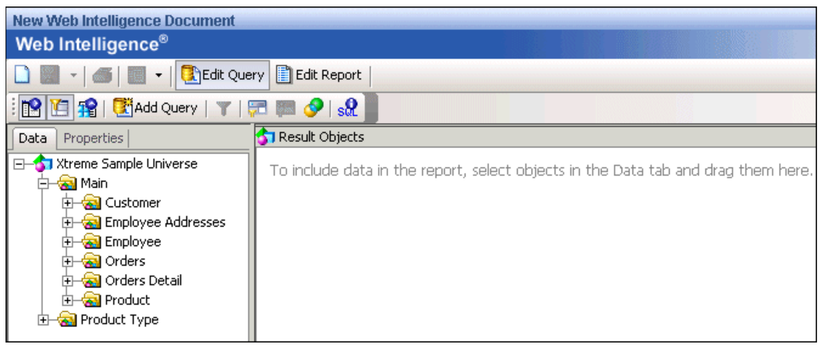
1. In InfoView, click **New**, and select **Web Intelligence Document**.

   The New Web Intelligence Document page appears.

2. Click the universe that you want to use as the data source for your document.

   NOTE: You can specify a default universe for Web Intelligence to use when you create a Web Intelligence document. See "Selecting a default universe" on page 26.

   The Web Intelligence report panel opens.



3. Build one or more queries to use in your document.

4. Click **Run Query**.

Editing queries in existing documents

You can edit the queries on which your Web Intelligence documents are based. By editing the queries, you can modify the data definitions of your documents to match changes in your corporate data and business needs.

To edit queries while viewing documents

1. Open the document that you want to view.

2. Click **Document actions**, and then select **Edit**.

   The report appears and displays the queries that are defined for the document.

9

Publishing Objects to SRM Report Optimizer

Overview

Publishing is the process of adding objects to the SRM Report Optimizer environment and making them available to authorized users. There are several types of objects that you can publish to SRM Report Optimizer:

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

You can publish objects to SRM Report Optimizer in three ways. For more information, see the following sections:

- "Publishing with the Publishing Wizard" on page 77.
- "Publishing with the Central Management Console" on page 87.
- "Saving objects directly to the CMS" on page 89.

Note: You can also create and add new objects directly to SRM Report Optimizer from within InfoView.

Publishing with the Publishing Wizard

The Publishing Wizard is a locally installed, Windows application that is made up of a series of dialog boxes. When you use the wizard, only the dialog boxes that are applicable to the objects/folders that you are publishing appear. For example, the settings for parameters and schedule format do not appear when you publish OLAP Intelligence reports.

Use the Publishing Wizard if you have access to the application and you want to publish multiple objects or an entire directory of objects to SRM Report Optimizer. Once an object is published, it appears in the folder that you specified in InfoView (or your customized web desktop) and in the Objects management area of the Central Management Console (CMC).

Note: Depending on the rights that are assigned by your SRM Report Optimizer administrator, you may not be able to publish objects by using the Publishing Wizard. Contact your SRM Report Optimizer administrator for more information.

Publishing options

During the publishing process, you specify how often an object is run. You can choose to set a recurring schedule, or you can choose to let users set the schedule themselves. For example, for Crystal reports, you can specify whether the data in the report is automatically refreshed according to a set schedule or if the data is refreshed only when users manually refresh the report.

Each publishing option has several features:

- **Specifying the data that users see**

  This option is recommended for objects that are accessed by a large number of people and/or do not require separate database logon credentials. When you publish an object, users can access the same instance of the object and reduce the number of times that the system is prompted for information.
- **Allowing users to update the data in the report**

  This option is recommended for objects that require separate database logon credentials. It is also recommended when you publish smaller objects that have frequent data changes and/or make use of parameters and record selection formulas. When you publish an object, users are able to determine the frequency in which the object is updated. However, users who access the object at the same time increase the load on the system by increasing the number of times that it is prompted for information.

Note:

- SRM Report Optimizer supports reports that are created in versions 6 through XI of Crystal Reports. However, once a report is published to SRM Report Optimizer, it is saved, processed, and displayed in version XI format.
- You can publish OLAP Intelligence reports to SRM Report Optimizer; however, you cannot set them to run on a recurring schedule.

Logging on to SRM Report Optimizer

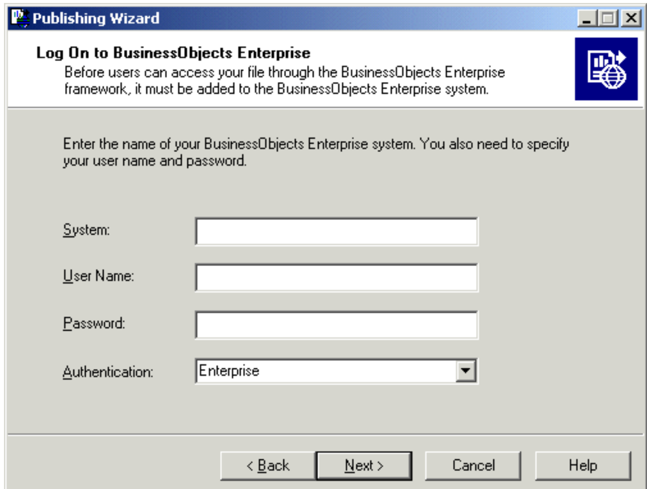
When you use the Publishing Wizard, you are prompted to log on to the SRM Report Optimizer system where you want to publish your objects.

1. On Windows, click **Start** > **Programs** > **BusinessObjects XI Release 2** > **BusinessObjects Enterprise** > **Publishing Wizard**.

The Welcome to the Publishing Wizard dialog box appears.

2. Click **Next**.

   The Log On to SRM Report Optimizer dialog box appears.

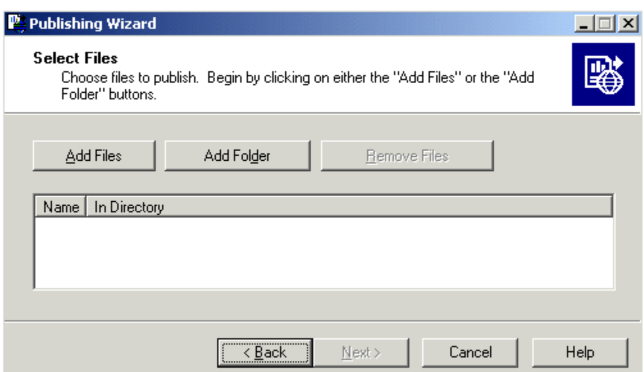


3. In the **System** field, type the name of the CMS where you want to publish objects.
4. In the **User Name** and **Password** fields, type your SRM Report Optimizer logon credentials.
5. From the **Authentication** list, select the appropriate authentication type.
6. Click **Next**.

   The Select Files dialog box appears.

Adding objects

7. In the Select Files dialog box, click **Add Files** or **Add Folders**.



8. Select the file/folder that you want to publish.

NOTE:

- Ensure that the appropriate file type is listed in the Files of Type field; by default this value is set to Report (*.rpt).
- If you are publishing a folder, you can also publish its subfolders by selecting the Include Subfolders option.

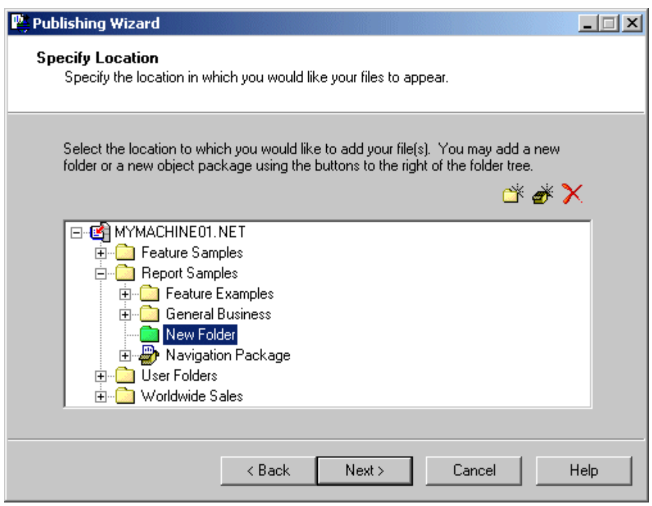
9. Repeat steps 1 and 2 for each of the files/folders that you want to publish.
10. Click **Next**.
11. If the Specify Object Type dialog box appears, choose a file type for each unrecognized object, and then click **Next**.

    The Specify Location dialog box appears.

Creating and selecting a folder on the CMS

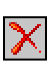
To publish the selected objects, you must create or select a folder on the host CMS. Only the folders to which you have access appear in the Specify Location dialog box.

1. In the Specify Location dialog box, select the folder where you want to publish the objects.



NOTE:

- To add a new folder to the CMS, select a folder and then click New Folder.
- To add a new object package to the CMS, select a folder, and then click New Object Package.



- To delete a folder or an object package, select the object, and click Delete.

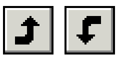
NOTE: From the wizard, you can delete only new folders and object packages. (New folders are green; existing folders are yellow.)

If you are publishing multiple objects, and you want to place them in separate directories, see "Duplicating the folder structure" on page 81.

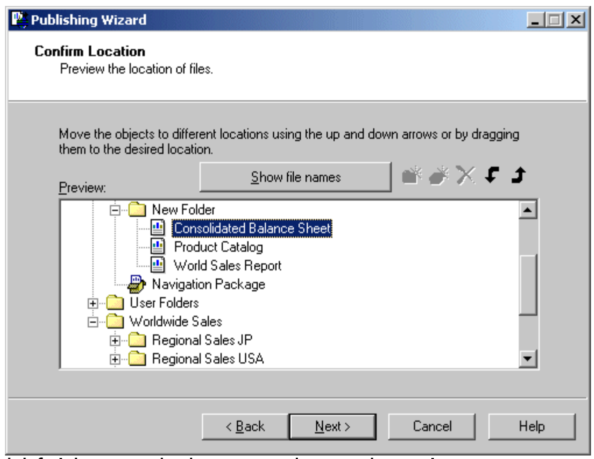
2. Click **Next**.

   The Confirm Location dialog box appears.

Moving objects between folders



3. In the Confirm Location dialog box, you can move objects to folders by selecting each object, and then clicking **Move Up** or **Move Down**.



You can also add folders and object packages by selecting a parent folder and clicking the New Folder or New Object Package button. To delete a folder or object packages, select it and click the Delete button. You can drag-and-drop objects to place them where you want, and you can right-click objects to rename them.

By default, the title of the objects are displayed. You can display the local file names of the objects by clicking the Show file names button.

4. Click **Next**.

   The Specify Categories dialog box appears.

Duplicating the folder structure

If you are adding multiple objects from a directory and its subdirectories, you are asked if you want to duplicate the existing folder hierarchy on the CMS.

1. In the **Specify Folder Hierarchy** dialog box, choose a folder hierarchy option:
   - To place all of the objects in a single folder, select Put the files in the same location.

- To recreate all of the folders and subfolders on the CMS as they appear on your hard drive, select Duplicate the folder hierarchy. Choose the topmost folder that you want to include in the folder hierarchy.

2. Click **Next**.

   The Confirm Location dialog box appears.

Adding objects to a category

If you want to add the selected objects to a category, you can create or select a category on the host CMS. You can add objects to more than one category.

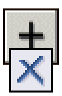
1. In the **Specify Categories** dialog box, click the category to which you want to assign the objects. Click **+** to the left of the category to view the subcategories.

   To add a new category to the CMS, select a category and then click New Category. The new category appears and can be renamed.

2. If you are publishing more than one objects, choose the object you want to add to the category from the **File** list.

   NOTE: Each object must be added to the category individually.



3. Click **Insert File**.
4. To delete a category or to remove an object from a category, select the item and click **Delete**.

   NOTE: From the wizard, you can delete only new categories. (New categories are green; existing categories are blue.)

5. Click **Next**.

   The Specify Schedule dialog box appears.

Changing scheduling options

The Specify Schedule dialog box allows you to schedule the objects you are publishing to run at specific intervals.

Note: This dialog box appears only for objects that can be scheduled.

1. In the **Specify Schedule** dialog box, select the object that you want to schedule.
2. Select one of three intervals:
   - **Run once only**

     Selecting the "Run once only" option provides two more sets of options:

     - **when finished this wizard**

     This option runs the object once when you finish publishing it. The object is not run again until you reschedule it.

- **at the specified date and time**

  This option runs the object once at a date and time you specify. The object is not run again until you reschedule it.

- **Let users update the object**

  This option does not schedule the object. Instead, it leaves the task of scheduling up to the user.

- **Run on a recurring schedule**

  Once you have selected this option, click the Set Recurrence button to set the scheduling options.

  The “Pick a recurrence schedule” dialog box appears.

  The options in this dialog box allow you to choose when and how often the object runs. Select the appropriate options and click OK.

3. Click **Next** after you have set the schedule for each object you are publishing.

Refreshing repository fields

The BusinessObjects Enterprise Repository is a central location in which shared elements such as text objects, bitmaps, custom functions, universes, and custom SQL commands are stored. You can choose to refresh the repository fields of an object if the object references the repository. To complete this task, the Publishing Wizard needs to connect to your BusinessObjects Enterprise Repository database from the local machine. For more details, see the *SRM Report Optimizer Administrator’s Guide*.

Note: The Specify Repository Refresh dialog box appears only when you publish report objects.

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1. In the **Specify Repository Refresh** dialog box, select a report, and then select the **Use Object Repository when refreshing report** check box if you want to refresh it against the repository.

   NOTE: Click the Enable All button if you want to refresh all of the objects that reference the repository; click the Disable All button if you want to refresh none of the objects.

   ---

2. Click **Next**.

Publishing with saved data

If you publish a report that include saved data, you are prompted by the Specify Keep Saved Data dialog box.

Note: The Specify Keep Saved Data dialog box appears only when you publish report objects.

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

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

2. Click **Next**.

Selecting a program type

The Program Type dialog box appears only when you publish program objects. For details about program objects and program object types, see the *SRM Report Optimizer Administrator's Guide*.

1. In the **Program Type** dialog box, select a program.
2. Choose one of the following program types:
   - **Binary/Batch**

     Binary/batch programs are executables, such as binary files, batch files, or shell scripts. They generally have file extensions such as .com, .exe, .bat, or .sh. You can publish any executable program that can be run from the command line on the machine where the Program Job Server is running.
   - **Java**

     You can publish any Java program to SRM Report Optimizer as a Java program object. They typically have a .jar file extension.
   - **Script**

     Script program objects are JScript and VBScript scripts.
3. After you specify the type of program that you are adding, click **Next**.

   The Program Credentials dialog box appears.

Specifying program credentials

4. In the **Program Credentials** dialog box, select a program.
5. In the **User Name** and **Password** fields, specify the user credentials for the account that you want to use for the program to run.

   The rights of the program are limited to those of the account with which it runs.
6. After you specify the user credentials for each program to use, click **Next**.

   The Change Default Values dialog box appears.

Changing default values

You can publish objects without changing any of the default properties. However, if you use the default values, your object may not schedule properly if the database logon information is incorrect or if the parameter values are invalid.

1. Select **Publish without modifying properties**.
2. Click **Next** through the wizard's remaining dialog boxes.

Alternatively, you can go through the remaining screens in the Publishing Wizard and make changes.

1. Select **Review or modify properties**.
2. Click **Next**.

   The Review Object Properties dialog box appears.

Changing object properties

3. In the **Review Object Properties** dialog box, select the object that you want to modify.
4. Enter a new title or description.
5. If you are publishing a report object, select the **Generate thumbnail image** check box if you want users to see a thumbnail of the object before they open it.

   NOTE: The "Generate thumbnail image" check box is available only if the object is a .rpt file and was saved appropriately. (To be able to display thumbnails for a report, open the report in Crystal Reports and, on the File menu, click Summary Info. Select the Save preview picture option, and click OK. Preview the first page of the report and save your changes.)

6. Click **Next**.

   The Specify Database Credentials dialog box appears if it is needed.

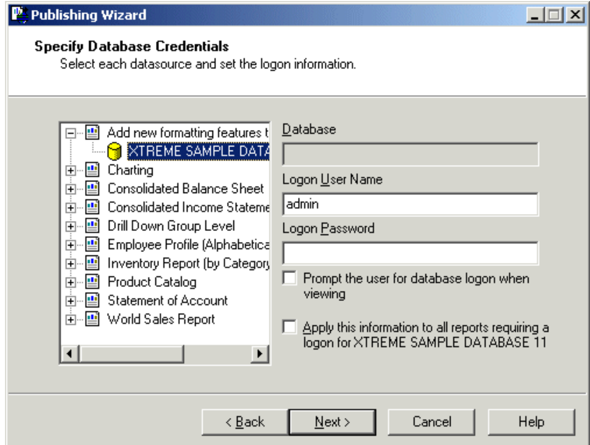
Entering database logon information

Some objects use data sources that require logon information. If the objects that you are publishing are of this type, do the following steps:

1. In the **Specify Database Credentials** dialog box, double-click the object, or click **+** to the left of the object to expose the database.
2. Select the database and change the logon information in the appropriate fields. If the database does not require a user name or password, leave the fields blank.

   NOTE: Enter user name and password information carefully. If it is entered incorrectly, the object cannot retrieve data from the database.

3. After you finish typing the logon information for each object, click **Next**.



The Set Report Parameters dialog box appears if it is needed.

Setting parameters

Some objects contain parameters for data selection. Before these objects can be scheduled, you must set the parameters to determine the objects' default prompts.

1. In the **Set Report Parameters** dialog box, select the object that includes the prompts that you want to change.

   The object's prompts and default values appear in a list on the right-hand side of the screen.
2. Click **Edit Prompt** to change the value of a prompt.

   Depending on the type of parameter that you have chosen, different dialog boxes appear.
3. If you want to set the prompts to contain a null value (where possible), then click **Set Prompts to NULL**.
4. Click **Next** after you have finished editing the prompts for each object.

   The Specify Format dialog box appears.

Setting the schedule output format

You can choose an output format for each scheduled report that you publish. For some of the formats, you can customize the schedule format options.

1. In the **Specify Format** dialog box, select the object that you want to set up to produce a different schedule output format.
2. Select a format from the list (Crystal Report, Microsoft Excel, Microsoft Word, Adobe Acrobat, and so on).

   Where applicable, customize the schedule format options. For example, if you select Paginated Text, enter the number of lines per page.
3. Click **Next**.

Adding extra files for programs

Some programs require access to other files in order to run.

1. Select a program.
2. Click **Add** to select the necessary file.
3. After you add all the necessary extra files for each program, click **Next**.

   The Command line for Program dialog box appears.

Specifying command line arguments

For each program, you can specify any command-line arguments that are supported by your program's command-line interface. They are passed directly to the command-line interface without parsing.

1. Select a program.
2. In the **Command line** area, type the command-line arguments for your program.

> **NOTE:** Use the same format you normally use at the command line.

3. After you specify all necessary command-line arguments for each program, click **Next**.

Finalizing the objects to be added

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

1. Ensure that all of the objects that you want to publish are on the list, and click **Next**.

   The objects are published to the CMS, scheduled, and/or run as specified. Afterwards, you return to the final screen of the Publishing Wizard.
2. To view the details of an object, select it from the list.
3. Click **Finish** to close the wizard.

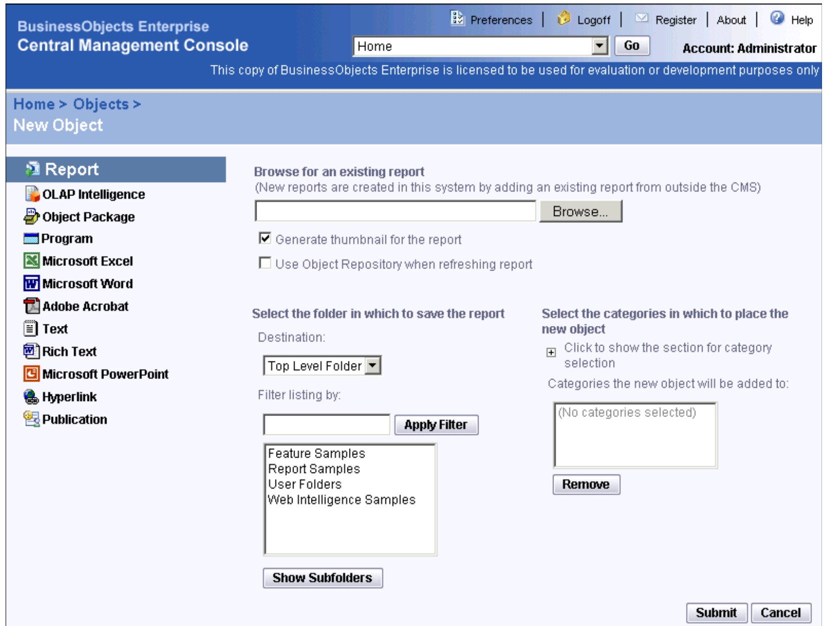
Publishing with the Central Management Console

If you have administrative rights to SRM Report Optimizer, you can publish objects over the Web from within the Central Management Console (CMC). Use the CMC to publish single objects or to perform administrative tasks remotely.

To publish an object with the CMC

1. Go to the Objects management area of the CMC.
2. Click **New Object**.

The New Object page appears.



3. On the left side of the page, select the type of object that you want to publish.
4. Specify the properties of the object:

NOTE: The properties that appear vary according to the type of object that you chose to publish.

- **File name**

  Type the full path to the object, or click Browse to perform a search.
- **Title**

  Type the name of the object.
- **Description**

  Type a description for the object.
- **Generate thumbnail for the report**

  If you are publishing a Crystal report, select this option if you want users to see a thumbnail preview of the report in SRM Report Optimizer.

  NOTE: To be able to display thumbnails for a report, open the report in Crystal Reports and, on the File menu, click Summary Info. Select the Save preview picture option, and click OK. Preview the first page of the report and save your changes.
- **Use Object Repository when refreshing report**

Select this option if you want to refresh the repository fields of a Crystal report against the repository every time the report runs.

- **Program type**

  Select Executable, Java, or Script.

  NOTE: Select Java for Java programs, Script for JScript and VBScript programs, and Executable for all other program objects.

- **URL**

  Type the URL of the page to which you want a hyperlink object to link.

5. If you want to assign the object to a category, select the category from the list.
6. Ensure that the correct folder name appears in the **Destination** field.

   NOTE: To expand a folder, select the folder, and click Show Subfolders.

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7. Click **OK**.

When the object is published to SRM Report Optimizer, the CMC displays the Properties screen. If necessary, you can modify properties such as title, description, database logon information, scheduling information, user rights, and so on for the object.

Saving objects directly to the CMS

If you have installed one of the Business Objects designer components, such as Crystal Reports, Designer, or OLAP Intelligence, you can use the Save As command to publish objects directly to SRM Report Optimizer from within the designer.

For example, after you design a report in OLAP Intelligence, on the File menu, click Save As. In the Save As dialog box, click Enterprise Folders; then, when prompted, log on to the Central Management Server (CMS). Specify the folder where you want to save the report, and click Save.

Desktop Intelligence documents can be published directly to the Central Management Server using the File>Export to Repository command in the Desktop Intelligence Designer.

Index