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You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS ENTERPRISE XI. You'll find the answers to all your questions on the BUSINESS OBJECTS ENTERPRISE XI in the user manual (information, specifications, safety advice, size, accessories, etc.). Detailed instructions for use are in the User's Guide.

**User manual BUSINESS OBJECTS ENTERPRISE XI**  
**User guide BUSINESS OBJECTS ENTERPRISE XI**  
**Operating instructions BUSINESS OBJECTS ENTERPRISE XI**  
**Instructions for use BUSINESS OBJECTS ENTERPRISE XI**  
**Instruction manual BUSINESS OBJECTS ENTERPRISE XI**

BusinessObjects Enterprise™ XI Release 2  
InfoView User's Guide

BusinessObjects Enterprise XI Release 2



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**Manual abstract:**

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*Contents Chapter 1 Welcome to BusinessObjects Enterprise 11 About this documentation . . . .*

. . . . .  
. . . . .  
. . . . .

*. . . 12 Who should use this documentation? . .*

. . . . .  
. . . . .

*. 12 Business Objects information resources . . . .*

. . . . .  
. . . . .

*. . . . 12 Chapter 2 Getting Started 13 Overview . . . . .*

. . . . .  
. . . . .  
. . . . .

. . . . .  
. . . . .  
. . . . .

*. . . . 14 Logging on to InfoView . . . . .*

. . . . .  
. . . . .  
. . . . .  
. . . . .

*. . . . 15 InfoView home page . . . . .*

. . . . .  
. . . . .  
. . . . .

*16 Header panel . . . . .*

. . . . .  
. . . . .  
. . . . .  
. . . . .  
. . . . .

*. . . . . 17 Navigation panel .*

. . . . .  
. . . . .  
. . . . .  
. . . . .

*18 Workspace panel . . . . .*

. . . . .  
. . . . .  
. . . . .  
. . . . .

*. 18 Recommended reading . . . . .*

. . . . .  
. . . . .

.....  
.....  
19 Viewing objects .....  
.....  
.....  
.....  
.....  
.. 19 Publishing and managing objects ...  
.....  
.....  
.....  
19 Crystal Reports Server recommended reading .....  
.....  
.....  
.....  
. 20 How to access InfoView .....  
.....  
.....  
.....  
..... 20 How to view files ...  
.....  
.....  
.....  
.....  
... 20 How to schedule files ...  
.....  
.....  
.....  
..... 20 How to organize files .....  
.....  
.....  
.....  
.....  
..... 21 How to use Discussions .....  
.....  
.....  
.....  
.....  
21 Chapter 3 Setting Preferences 23 Overview .....  
.....  
.....  
.....  
.....  
.....  
.....  
.....  
24 General preferences .....  
.....  
.....  
.....  
.....  
.....  
.....  
.....  
. 24 Desktop Intelligence preferences ....  
.....  
.....  
.....

. . . 26 OLAP Intelligence preferences . . .	.....
	.....
	.....
. 27 Crystal Reports preferences . . . . .	.....
	.....
	.....
. 28 Selecting your Crystal report viewer . . . . .	.....
	.....
.. 28 BusinessObjects Enterprise XI Release 2 InfoView User's Guide 3 Contents Description of the Crystal report viewers . . .	.....
	.....
29 ActiveX viewer . . . . .	.....
	.....
	.....
30 DHTML viewer . . . . .	.....
	.....
	.....
31 Advanced DHTML viewer . . . . .	.....
	.....
	.....
. . 32 Java viewer . . . . .	.....
	.....
	.....
. . . . 33 Web Intelligence preferences .	.....
	.....
	.....
. . . . 34 Selecting Web Intelligence view formats .	.....
	.....
	.....
. . . 34 Selecting report panel formats . .	.....
	.....
	.....
. . . . 35 Selecting your Drill options .	.....
	.....
	.....

.....  
... 36 *Selecting MS Excel formats* ..  
.....  
.....  
.....  
.....  
. 38 *Selecting a locale* .....  
.....  
.....  
.....  
.....  
.. 39 *Selecting a default universe* .....  
.....  
.....  
.....  
..... 39 *Changing your password* .....  
.....  
.....  
.....  
..... 40 *Chapter 4 Working with Objects* 41 *Overview* .  
.....  
.....  
.....  
.....  
.....  
..... 42 *Navigating through folders or categories* .....  
.....  
.....  
.....  
.. 42 *Accessing objects in your personal folders or inbox* .....  
.....  
.. 42 *Viewing objects* ...  
.....  
.....  
.....  
.....  
... 42 *Selecting which objects to display* .....  
.....  
.....  
.....  
.. 43 *Searching for objects* .....  
.....  
.....  
.....  
.....  
43 *Opening objects for viewing* .....  
.....  
.....  
.....  
... 44 *Changing viewers* ..  
.....

.....

.....

.....

.....

..... *44 Organizing objects* .....

.....

.....

.....

.....

..... *44 Creating folders or categories* ..

.....

.....

.....

*44 Adding objects to a folder* .....

.....

.....

.....

*45 Assigning objects to a category* .....

.....

.....

.....

*45 Sorting objects* .....

.....

.....

.....

..... *46 Scheduling objects* ..

.....

.....

.....

.....

.....

*46 Instance title* ....

.....

.....

.....

.....

..... *48 When to run a scheduled object* ....

.....

.....

.....

..... *48 Database logon information* ....

.....

.....

.....

..... *49 Filters* ..

.....

.....

.....

.....

.....  
.....  
... 49 4 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Contents Destination locations .  
.....  
.....  
.....  
.....  
..... 49 Formats ...  
.....  
.....  
.....  
.....  
.....  
.....  
51 Print settings .....  
.....  
.....  
.....  
..... 53 Server group settings .  
.....  
.....  
.....  
.....  
..... 53 Parameters ...  
.....  
.....  
.....  
.....  
..... 54 Events .....  
.....  
.....  
.....  
.....  
..... 54 Pausing or resuming an instance ....  
.....  
.....  
.....  
..... 55 Viewing object history .....  
.....  
.....  
.....  
..... 56 Viewing instances of objects .....  
.....  
.....  
..... 56 Viewing historical instances .....  
.....  
.....

.....  
.. 56 Deleting an instance .....

.....  
.....  
.....  
.....  
..... 57 Sending objects or instances ..

.....  
.....  
.....  
.....

.. 58 Adding new objects to InfoView .....

.....  
.....  
.....

.... 59 Setting object properties .....

.....  
.....  
.....

.. 59 Chapter 5 Working with Dashboards 61 Overview ...

.....  
.....  
.....  
.....  
.....  
.....

.. 62 Creating a dashboard .....

.....  
.....  
.....

.... 62 Editing the dashboard ..

.....  
.....  
.....  
.....

.... 63 Chapter 6 Using Discussions 65 Overview .....

.....  
.....  
.....  
.....

.... 66 Using the Discussions panel ..

.....  
.....  
.....

.... 66 Accessing the Discussions panel ..

.....  
.....  
.....

.. 67 Creating a note ...

.....



.....  
.....  
.....  
..... 67 Replying to a note .  
.....  
.....  
.....  
.....  
..... 67 Editing a note .  
.....  
.....  
.....  
.....  
.....  
..... 68 Deleting a note .....  
.....  
.....  
.....  
..... 68 Chapter 7 Using Encyclopedia 69 Overview ....  
.....  
.....  
.....  
.....  
.....  
..... 70 Accessing Encyclopedia ....  
.....  
.....  
.....  
.....  
..... 70 Creating and maintaining Encyclopedia information .....  
.....  
..... 71 Overview tab .....  
.....  
.....  
.....  
..... 71 BusinessObjects Enterprise XI Release 2 InfoView User's Guide 5 Contents Editing overview information .....  
.....  
.....  
.....  
..... 72 Business questions .....  
.....  
.....  
.....  
..... 72 Creating a question .  
.....  
.....  
.....





.....	86 Printing reports ...
.....	.....
.....	.....
.....	.....
.....	86 Exporting reports .....
.....	.....
.....	.....
.....	.....
..	87 Format types .....
.....	.....
.....	.....
.....	.....
...	87 Crystal Reports Offline Viewer .....
.....	.....
.....	.....
.....	88 Installing the Crystal Reports Offline Viewer ...
.....	.....
.....	89 Launching the Crystal Reports Offline Viewer ..
.....	.....
.....	.....
..	89 6 Businer programs ...
.....	.....
.....	.....
..	116 Specifying command line arguments ...
.....	.....
.....	.....
..	117 Finalizing the objects to be added ...
.....	.....
.....	.....
.....	117 Publishing with the Central Management Console .....
.....	.....
.....	117 Saving objects directly to the CMS ..
.....	.....
.....	.....
.....	119 Appendix A Addenda 121 Scheduling a Desktop Intelligence document to HTML format ..
.....	.....
.....	122 Scheduling a Desktop Intelligence document to .txt format ..
.....	.....
.....	122 Scheduling a Desktop Intelligence document to RTF .
.....	.....
.....	122 Appendix B Business Objects Information Resources 123 Documentation and information services .....
.....	.....
.....	.....
.....	.....

124	Documentation . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
124	What's in the documentation set? . . . . .	
	. . . . .	
	. . . . .	
. . .	124 Where is the documentation? . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . . . .	124 Documentation from the products . . . . .	
	. . . . .	
	. . . . .	
. . . . . . . . . . .	124 Documentation on the web . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . . . . . . . . . .	124 Documentation on the product CD . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . .	124 Send us your feedback . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . . . . . . . . . .	125 Customer support, consulting and training . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . .	125 How can we support you? . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . . . . . . . . . .	125 Online Customer Support . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . . . . . . . . . .	125 8 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Contents Looking for the best deployment solution for your company? . . . . .	
. . . . .	126 Looking for training options? . . . . .	
	. . . . .	
	. . . . .	
. . . . .	126 Useful addresses at a glance . . . . .	
	. . . . .	
	. . . . .	
	. . . . .	
. . .	126 Index 127 BusinessObjects Enterprise XI Release 2 InfoView User's Guide 9 Contents 10 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Welcome to BusinessObjects Enterprise chapter 1 Welcome to BusinessObjects Enterprise About this documentation About this documentation This help provides you with information and procedures for using BusinessObjects Enterprise and InfoView. InfoView runs within your web browser and is your main interface for working with objects in BusinessObjects Enterprise.	

Your BusinessObjects Enterprise administrator may deploy different types of objects, such as Crystal reports, OLAP Intelligence reports, Web Intelligence

documents, Desktop Intelligence documents, and other objects that are created from BusinessObjects Enterprise plug-in components. InfoView allows you to view these objects, organize them, and work with them to suit your needs. Note: Because the appearance and functionality of InfoView can be customized, your desktop may be different from the one that is described in this help. However, you can still apply many of the procedures that are described in the sections that follow. Who should use this documentation? This help is intended for users who work with objects over the Web through BusinessObjects Enterprise and InfoView. For more information about the product, consult the BusinessObjects Enterprise Administrator's Guide, the BusinessObjects Enterprise Getting Started Guide, and the BusinessObjects Enterprise Installation Guide. Online versions of these guides are included in the docs directory of your product distribution. Business Objects information resources For more information and assistance, see Appendix B: Business Objects Information Resources. This appendix describes Business Objects documentation, customer support, training, and consulting services, and provides links to online resources. 12 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Getting Started chapter 2 Getting Started Overview Overview BusinessObjects Enterprise 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. BusinessObjects Enterprise 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 Chapter 6: Using Discussions.
- Encyclopedia This feature provides users with key information about reports and documents to facilitate the analysis of business intelligence. For more information, see Chapter 7: Using Encyclopedia.
- OLAP Intelligence This feature allows users to create customized OLAP reports based on multi-dimensional data sources. For more information, see Chapter 10: Working with OLAP Intelligence Reports.
- 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 BusinessObjects Enterprise administrator.

14 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Getting Started Logging on to InfoView 2 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 BusinessObjects Enterprise and InfoView, it is recommended that you use Internet Explorer.



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1. 2. To log on to InfoView Open your web browser. 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 BusinessObjects Enterprise.

You may need to ask your administrator for the name of the web server or the exact URL to enter. Tip: If you have any BusinessObjects Enterprise 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 BusinessObjects InfoView page appears. 3. In the System field, type the name of the machine that hosts your Central Management Server (CMS). BusinessObjects Enterprise XI Release 2 InfoView User's Guide 15 2 Getting Started InfoView home page 4. 5. In the User name and Password fields, type your logon credentials. Tip: If you want to log on as a guest, leave both fields blank.

From the Authentication list, select Enterprise, LDAP, Windows AD, or Windows NT. . . . Enterprise authentication requires a user name and password that are recognized by BusinessObjects Enterprise. 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 BusinessObjects Enterprise Administrator's Guide. 6. Click Log On. The BusinessObjects InfoView home page appears. InfoView home page If you successfully logged on, the BusinessObjects InfoView home page appears in your web browser. 16 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Getting Started InfoView home page 2 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 BusinessObjects Enterprise 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 17 "Navigation panel" on page 18 "Workspace panel" on page 18 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. Create a new item Creates a new folder, category, or object. Refresh the Workspace Panel Refreshes the Workspace panel.

Send a document Sends an object or instance to a destination. My InfoView Allows you to create custom dashboards. Search Allows you to search for objects. Preferences Allows you to set how information is displayed. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 17 2 Getting Started InfoView home page Option Description 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: 18 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Getting Started Recommended reading 2 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 BusinessObjects Enterprise and InfoView, you may want to focus on specific sections of this document.

Viewing objects If you use BusinessObjects Enterprise 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 13 "Setting Preferences" on page 23 "Working with Objects" on page 41 Publishing and managing objects For advanced users who publish and organize objects for other users to view, it is recommended that you read the following sections: . . . . . "Getting Started" on page 13 "Setting Preferences" on page 23 "Working with Objects" on page 41 "Working with Dashboards" on page 61 "Using Discussions" on page 65 "Using Encyclopedia" on page 69 "Publishing Objects to BusinessObjects Enterprise" on page 105 Depending on the types of objects the you create and/or publish, you may also want to review the following sections: BusinessObjects Enterprise XI Release 2 InfoView User's Guide 19 2 Getting Started Crystal Reports Server recommended reading . . . "Working with Crystal Reports" on page 83 "Working with OLAP Intelligence Reports" on page 97 "Working with Web Intelligence Documents" on page 91 Note: If you work with Web Intelligence documents, also refer to Building Reports with the Web Intelligence Report Panel, which appears when you click help while you view a Web Intelligence document. Crystal Reports Server recommended reading This section outlines the topics in the BusinessObjects Enterprise InfoView Guide that will be of most use to you if you are using Crystal Reports Server. How to access InfoView For information about accessing InfoView, go to the following sections: . . "Logging on to InfoView" on page 15 "InfoView home page" on page 16 How to view files For information about viewing files inside InfoView go to the following sections: . . . "Viewing objects" on page 42 "Opening objects for viewing" on page 44 "Changing viewers" on page 44 How to schedule files For information about scheduling files inside InfoView go to the following sections: . . . . . 20 "Scheduling objects" on page 46 "Instance title" on page 48 "When to run a scheduled object" on page 48 "Destination locations" on page 49 "Pausing or resuming an instance" on page 55 "Viewing instances of objects" on page 56 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Getting Started Crystal Reports Server recommended reading 2 . "Deleting an instance" on page 57 How to organize files For information about organizing your content in InfoView go to the following sections: . . . . "Organizing objects" on page 44 "Creating folders or categories" on page 44 "Adding objects to a folder" on page 45 "Assigning objects to a category" on page 45 "Sorting objects" on page 46 How to use Discussions For information about how to use Discussions go to Chapter 6: Using Discussions.



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*BusinessObjects Enterprise XI Release 2 InfoView User's Guide 21 2 Getting Started Crystal Reports Server recommended reading 22 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences chapter 3 Setting Preferences Overview 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 26 "OLAP Intelligence preferences" on page 27 "Crystal Reports preferences" on page 28 "Web Intelligence preferences" on page 34 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 BusinessObjects Enterprise 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. 1.*

*2. To set general preferences Log on to InfoView. On the Header panel toolbar, click Preferences. 24 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences General preferences 3 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.*

*Tip: You can also customize a dashboard to be your initial view. For details, see "Creating a dashboard" on page 62. 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. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 25 3 Setting Preferences Desktop Intelligence preferences 5. 6. In the "On my desktop" area, specify the maximum number of objects that you want to see displayed per page in the Workspace panel. 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: . . . 7. 8. Description Owner Date Instance Count Actions and Descriptions (if selected) initially not hidden In the "View my documents" area, select how you want to view your documents. 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. 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. 9. 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 BusinessObjects Enterprise, 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.*

*1. 2. To select a view format for Desktop Intelligence documents Log on to InfoView. On the Header panel toolbar, click Preferences. The Preferences appears. 26 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences OLAP Intelligence preferences 3 3. 4. Click the Desktop Intelligence Document tab. 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. 1. 2. 3. 4. To select an OLAP Intelligence viewer Log on to InfoView.*

*On the Header panel toolbar, click Preferences. The Preferences appears. Click the OLAP Intelligence tab. 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.*

*BusinessObjects Enterprise XI Release 2 InfoView User's Guide 27 3 Setting Preferences Crystal Reports preferences 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 28 "Description of the Crystal report viewers" on page 29 Selecting your Crystal report viewer 1. 2. 3. 4. To select a Crystal report viewer Log on to InfoView. On the Header panel toolbar, click Preferences. The Preferences appears. Click the Crystal Report tab. 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 30. . DHTML viewer The DHTML viewer is a zero-client viewer for browsers that support Dynamic HTML. For more information, see "DHTML viewer" on page 31. . 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.*



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For more information, see "Advanced DHTML viewer" on page 32. · Java viewer The Java viewer is designed for web browsers that support the Java Virtual Machine. For more information, see "Java viewer" on page 33. 28 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Crystal Reports preferences 3 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. 7.

In the "Preferred measuring units for report page layout is" area, select inches or millimeters. 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. Click OK. 8. 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 BusinessObjects Enterprise 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 28.) You can view your reports by using any of the following Crystal report viewers: · · · · "ActiveX viewer" on page 30 "DHTML viewer" on page 31 "Advanced DHTML viewer" on page 32 "Java viewer" on page 33 You can also view your reports when you are not connected to BusinessObjects Enterprise. For more information, see the "Crystal Reports Offline Viewer" on page 88. Note: Some features of the Crystal report viewers may be disabled by your BusinessObjects Enterprise administrator. Contact your administrator for more information. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 29 3 Setting Preferences Crystal Reports preferences 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 84. 30 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Crystal Reports preferences 3 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 84. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 31 3 Setting Preferences Crystal Reports preferences 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 84.

32 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Crystal Reports preferences 3 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. Note: Because the Advanced Search Wizard accesses the data source of the report, you must have at least View On Demand rights (or higher) in BusinessObjects Enterprise to use the wizard. Note: Depending on how your BusinessObjects Enterprise 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 BusinessObjects Enterprise XI Release 2 InfoView User's Guide 33 3 Setting Preferences Web Intelligence preferences · · · 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.



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For more information, see "Viewing Crystal reports" on page 84. 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 34 "Selecting report panel formats" on page 35 "Selecting your Drill options" on page 36 "Selecting MS Excel formats" on page 38 "Selecting a locale" on page 39 "Selecting a default universe" on page 39 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. 1. 2. 3. To select a view format for Web Intelligence documents Log on to InfoView. On the Header panel toolbar, click Preferences.

The Preferences appears. Click the Web Intelligence Document tab. 34 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Web Intelligence preferences 3 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. Note: 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. . 5. If you want to be able to view and print the documents, then choose Portable Document Format (Adobe Reader required).

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. 1. To select a report panel 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 that the following 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.

BusinessObjects Enterprise XI Release 2 InfoView User's Guide 35 3 Setting Preferences Web Intelligence preferences . 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. 1. 2. To set your drill options In the "Select a view format" area, ensure that either HTML or Interactive is selected.

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.

36 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Web Intelligence preferences 3 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.



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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: In the second example, Synchronize drill on report blocks is not selected, so only the table displays the drilled values: BusinessObjects Enterprise XI Release 2 InfoView User's Guide 37 3 Setting Preferences Web Intelligence preferences · 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. 1. To select an MS Excel format In the "Select MS Excel format" area, select the Excel format that you want to use: · · 2. 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". Click OK.

38 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Setting Preferences Web Intelligence preferences 3 Selecting a locale The locale setting determines the language set and date format that Web Intelligence uses when you work with your documents. 1. 2. To select a locale From the "Select a format locale" list, select your current location. In the "When viewing a document" area, choose one of the following options: · · 3.

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 24), then choose Use my formatting locale to format the data. 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. 2. Click the Web Intelligence Document tab. In the "Select a default Universe" area, click Browse, and choose one of the following options: · · 3. 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. Click OK. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 39 3 Setting Preferences Changing your password Changing your password You can change the password that you use to log on to InfoView. 1. 2.

3. 4. 5. To change your password Log on to InfoView. On the Header panel toolbar, click Preferences. Click the Password tab. The Password page appears. Type your old password. 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.

40 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects chapter 4 Working with Objects Overview Overview This section 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. 1. 2. To navigate through folders or categories In the Navigation panel, click Show Folders or Show Categories to view the folders/categories that are available to you in InfoView.

Expand a folder/category to view any subfolders/subcategories. Tip: 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 44.

Accessing objects in your personal folders or inbox 1. To access your folders or your Inbox 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. 3. Expand My Folders. Click Favorites or Inbox.

Viewing objects Viewing objects includes the following tasks: · · · "Selecting which objects to display" on page 43 "Searching for objects" on page 43 "Selecting which objects to display" on page 43 "Opening objects for viewing" on page 44 42 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects Viewing objects 4 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. 1. 2. To select the type of objects that are displayed On the Workspace panel toolbar, click Filter. Select the type of object that you want to see. Tip: 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. 1. 2.

To search for an object On the Header panel toolbar, type the word(s) that you want to locate in the Search field.



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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.

BusinessObjects Enterprise XI Release 2 InfoView User's Guide 43 4 Working with Objects Organizing objects Opening objects for viewing If you have View On Demand rights in BusinessObjects Enterprise, 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 46. 1. 2.

To view an object Navigate to an object, and click its title to open it. 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. Tip: 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 46 and "Viewing object history" on page 56. 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 23. Organizing objects Organizing objects includes the following tasks: . . . "Creating folders or categories" on page 44 "Adding objects to a folder" on page 45 "Assigning objects to a category" on page 45 "Sorting objects" on page 46 Creating folders or categories Folders and categories are typically created for you by your BusinessObjects Enterprise administrator. However, if you have the necessary rights, you can also create folders and/or categories for you to use in InfoView. 44 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects Organizing objects 4 1.

2. 3. 4. 5. To create a folder or category In the Navigation panel, click Show Folders or Show Categories. Go to the folder/category where you want to add a new folder/category. On the Header panel toolbar, click New, and select Folder or Category. The New Folder or New Category page is displayed. Type a name for the new folder/category. 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 43. 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 BusinessObjects Enterprise.

For details, see "Adding new objects to InfoView" on page 59 and "Publishing Objects to BusinessObjects Enterprise" on page 105. 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. BusinessObjects Enterprise 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. 1. 2. To assign an object to a category Go to the folder that contains the object that you want to assign. Click the Properties link of the object. BusinessObjects Enterprise XI Release 2 InfoView User's Guide 45 4 Working with Objects Scheduling objects Tip: 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.

4. In the Categories area, select the categories to which you want to assign the object. 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 23.) The default time zone is local to the web server that runs BusinessObjects Enterprise, 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.

46 BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects Scheduling objects 4 1. To schedule an object Go to the folder that contains the object that you want to schedule, and click the object's Schedule link. Tip: 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 48 "When to run a scheduled object" on page 48 "Database logon information" on page 49 "Filters" on page 49 "Destination locations" on page 49 "Formats" on page 51 "Print settings" on page 53 "Server group settings" on page 53 "Parameters" on page 54 "Events" on page 54 Note: For some scheduling options, the settings that the administrator has specified for the object are already selected when you choose that option.



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You can schedule an object with these options or choose your own options. 3. Click Schedule.

*BusinessObjects Enterprise XI Release 2 InfoView User's Guide 47 4 Working with Objects Scheduling objects 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.

48 *BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects Scheduling objects 4 . . . 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 BusinessObjects Enterprise 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. 1.

2. 3. To schedule an object with database logon information On the Schedule page, expand the Database Logon option. If necessary, change the logon information for the object's data source. 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. 1. 2. 3.

To schedule an object with a record selection formula On the Schedule page, expand the Filters option. Change the record or group selection formula as necessary. 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 BusinessObjects Enterprise XI Release 2 InfoView User's Guide 49 4 Working with Objects Scheduling objects 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 BusinessObjects Enterprise 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 is 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. 50 *BusinessObjects Enterprise XI Release 2 InfoView User's Guide Working with Objects Scheduling objects 4 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 BusinessObjects Enterprise Administrator's Guide. 1. 2.*

3. To specify a destination On the Schedule page, expand the Destination option. In the Destination list, select the destination of your choice. 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 BusinessObjects Enterprise.



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