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You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS INFOVIEW 6.5. You'll find the answers to all your questions on the BUSINESS OBJECTS INFOVIEW 6.5 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 INFOVIEW 6.5
User guide BUSINESS OBJECTS INFOVIEW 6.5
Operating instructions BUSINESS OBJECTS INFOVIEW 6.5
Instructions for use BUSINESS OBJECTS INFOVIEW 6.5
Instruction manual BUSINESS OBJECTS INFOVIEW 6.5

InfoView User's Guide

InfoView 6.5
Windows and UNIX



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you quickly access the documentation and other information you need. Where do I start? Below are a few suggested starting points; there is a summary of useful web addresses on page 12. Documentation Roadmap The Documentation Roadmap references all Business Objects guides and multimedia, and lets you see at a glance what information is available, from where, and in what format. View or download the Business Objects Documentation Roadmap at www.businessobjects.com/services/documentation.htm Documentation from the products You can access electronic documentation at any time from the product you are using. Online help, multimedia, and guides in Adobe PDF format are available from the product Help menus. Documentation on the web The full electronic documentation set is available to customers with a valid maintenance agreement on the Online Customer Support (OCS) website at www.businessobjects.com.



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How can I get the most recent documentation? You can get our most up-to-date documentation via the web. Regularly check the sites listed below for the latest documentation, samples, and tips. Tips & Tricks Open to everyone, this is a regularly updated source of creative solutions to any number of business questions. You can even contribute by sending us your own tips. www.businessobjects.com/forms/tipsandtricks_login.asp Product documentation We regularly update and expand our documentation and multimedia offerings. With a valid maintenance agreement, you can get the latest documentation in seven languages on the Online Customer Support (OCS) website. Developer Suite Online Developer Suite Online provides documentation, samples, and tips to those customers with a valid maintenance agreement and a Developer Suite license via the Online Customer Support (OCS) website.

Send us your feedback Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful?

Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation:

documentation@businessobjects.com NOTE If your issue concerns a Business Objects product and not the documentation, please contact our Customer Support experts. For information about Customer Support visit: www.businessobjects.com/services/support.htm

Maximizing Your Information Resources InfoView User's Guide 11 Services A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business. How we can support you? Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate three global customer support centers: · Americas: San Jose, California and Atlanta, Georgia · Europe: Maidenhead, United Kingdom · Asia: Tokyo, Japan and Sydney, Australia Online Customer Support Our Customer Support website is open to all direct customers with a current maintenance (Country\Country Id). This font is also used for all paths, directories, scripts, commands and files for UNIX. Placed at the end of a line of code, the symbol (`\`) indicates that the next line should be entered continuously with no carriage return.

Some code more code \$DIRECTORYPATHNAME The path to a directory in the Business Objects installation/configuration directory structure. For example: · \$INSTALLDIR refers to the Business Objects installation directory. · \$LOCDATADIR refers to a subdirectory of the BusinessObjects installation directory called locData. Maximizing Your Information Resources Introduction to InfoView chapter 16 InfoView User's Guide Overview InfoView is a business intelligence portal that collects and consolidates your company's Business Intelligence information and presents it in a secure, organized, and personalized view to users inside and outside your organization. With InfoView you can customize the look of your interface, manage, save, distribute, print and schedule documents for automated processing by Broadcast Agent. You can do all this from your office, home, or around the world, using your corporate intranet, extranet, or the World Wide Web. It is both a stand-alone business intelligence portal (BIP), and a BI-content provider for enterprise information portals (EIPs). InfoView enables you to access business information created using BusinessObjects and WebIntelligence. Introduction to InfoView InfoView User's Guide 17 What is InfoView? InfoView is your personal gateway to your corporate information capital. It allows you to access documents generated from your corporate data storage, from your office, home, or around the world, using your corporate intranet, extranet, or the World Wide Web.

To use InfoView, you do not need to install any additional software on your computer. All you need is a standard Internet browser. At the core of InfoView are the document lists that give you an instant overview of all the documents available to you in the corporate database. InfoView includes two document areas: · The Corporate Documents page is a catalog of all the documents that you are allowed to access in the corporate repository, the centralized BusinessObjects storage and distribution mechanism that manages universes, user information and document exchange. · The Personal Documents page lists the documents you have saved for your own personal use. Within this page, the Inbox stores the documents that other users have sent you. What is InfoView? 18 InfoView User's Guide These lists not only keep you up to date with all the documents likely to impact your work, but provide you with the means to view, update and manage those documents. You can save documents for your personal use, send them to other users, and save them to the corporate repository for broader circulation. Introduction to InfoView InfoView User's Guide 19 What can you do with InfoView? You can use InfoView as your common entry point for viewing, managing, distributing, and downloading documents in your corporate repository. InfoView allows you to access documents that have been created using either WebIntelligence or BusinessObjects, and any other documents that are uploaded to the repository, such as Word documents, Excel spreadsheets, and PDF files.

For information about how WebIntelligence and BusinessObjects documents are created, refer to "Creating and Editing Documents" on page 113. The documents you view may be simple ones containing tables or charts, or more complex ones containing hyperlinked indexes, created in WebIntelligence, which allow you to navigate instantly between sections. This image shows an example of a document containing tables. Because you are using a web browser, you can also read documents containing hyperlinked images and sound or video objects.



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For example, by clicking the name of a model in an imported car catalog, a document could launch a video showing a 360° view of the car, as well as its interior features.

Depending on your user rights, you can also install BusinessObjects from your browser to view, create and edit documents. What can you do with InfoView? 20 InfoView User's Guide User rights The actions you can perform on a particular document or document type depend on your user rights. If you can see a document area in your interface, such as the Corporate Documents area in the Home page, you have the rights to view these documents. You may also have editing rights. If you have a question regarding your user rights, ask your system administrator or Business Objects supervisor.

New look InfoView If your InfoView pages do not look like the images in this guide, your system administrator may have chosen a different skin, or customized the interface for use in your company or organization. For more information, refer to "Selecting your default skin" on page 70. Introduction to InfoView InfoView User's Guide 21 How are documents created? WebIntelligence and BusinessObjects users use the same BusinessObjects technology to query a database or data warehouse for the purpose of generating documents. The two basic mechanisms in this technology are: · Universes used to build queries. · Queries used to retrieve information from data storage. Universes A universe is the business-intelligent semantic layer that isolates users from the technical aspects of the database. Universes are made up of objects and classes: · Objects are elements that map to a set of data from a relational database in terms that pertain to your business situation. For example, the objects in a human resources universe might include Names, Addresses and Salaries. · Classes are logical groupings of objects. For example, the objects listed above might belong to a class called Employees.

In your company or organization, universes are created by a universe designer, using BusinessObjects Designer. WebIntelligence and BusinessObjects users then use these universes to access the data they need from the database through an intuitive, user-friendly interface. Queries If you have the right to create documents, you can build queries by adding objects from a universe to a document editor and organizing the objects so that the data is clearly displayed. When the users run the query, the data mapped to the objects in the query is retrieved from the database. A document is then generated using the data and formatting defined by the designer. For information, refer to "Creating and Editing Documents" on page 113. How are documents created? 22 InfoView User's Guide What is new in InfoView? If you have used a previous version of InfoView, the table below gives you an overview of the changes made in this release. What has changed New interface What it is now InfoView has a new streamlined web interface that provides easy navigation and quick access to WebIntelligence, BusinessObjects, and other documents. The redesigned InfoView Home page provides an overview of all the documents to which you have access in the corporate repository and in your personal document storage areas. From the Home page, you can also add documents to InfoView from your own computer, or launch WebIntelligence or BusinessObjects to create new reports.

With this release, InfoView comes with a set of skins to let you customize InfoView's look and feel without any programming. Skins are sets of images and styles that alter the interface's colors, fonts, graphics, icons, and toolbars. You can use any of the sample skins provided by Business Objects simply by choosing one in the Options page. A company administrator can go one step further by creating a custom company skin to make InfoView adhere to a company's corporate standards. For more information, refer to "Selecting your default skin" on page 70.

You can now move and delete portlets directly in My InfoView instead of having to go through wizards. It's faster and more straightforward to use. For more information, refer to "Working with portlets" on page 85. Personalization using skins My InfoView personalization using inline editing Introduction to InfoView InfoView User's Guide 23 What has changed Streamlined document actions What it is now Working with documents has never been easier. Document exchange has been streamlined into two actions, Save and Send.

Send still transmits documents to one or more other InfoView users. Publish, Save and Download have been grouped together as Save, meaning that you now respectively: · Save a document to the Corporate Documents page, a storage area. · Save a document to your Personal Documents page. · Save a document to the file system on your computer, outside of InfoView. This option allows you to save the document in formats such as Microsoft® Excel. For more information, refer to "Saving documents" on page 155. Interactive report viewing InfoView now provides for the interactive viewing of WebIntelligence reports. Users with no knowledge of how to build or modify a report can now change the structure and properties of a report without having to use a document editor. When this feature is enabled, you can filter and sort the data in a report. You enable and disable this feature in the InfoView Options page.

The availability of this feature depends on how InfoView was installed and what user rights you have. Ask your administrator if you have the rights to this feature. What is new in InfoView? 24 InfoView User's Guide What has changed Corporate hierarchical categories What it is now In previous versions of InfoView, users could associate documents in the Corporate Documents page with one or more categories. With this version, you can create subcategories within categories, and so, create hierarchical categories. You can then associate a document with one or more of these categories or subcategories. In InfoView, these categories can be displayed either as links at the top of the page, or as a standard, collapsible tree in a navigational panel to the left of the page. To see the documents associated with a given category, simply click the category's name. If you want, you can save documents to one or more categories simultaneously. For more information, refer to "Introducing hierarchical categories" on page 143. Introduction to InfoView Getting Up and Running chapter 26 InfoView User's Guide Overview This chapter explains how to: · check your browser settings · log into InfoView · log out of InfoView · get help Getting Up and Running InfoView User's Guide 27 Checking your browser configuration For InfoView to run correctly, you need to make sure your browser configuration is adapted to InfoView use.



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Before you log into InfoView for the first time you should run an automatic check for any potential configuration problems. To do this, ensure that your browser is: · enabled for JavaScript · enabled for cookies · supported by Business Objects The following sections explain how to do this. Is your browser JavaScript-enabled? If your browser is not JavaScript-enabled, it cannot run the Check Browser feature, and an error message appears. Click Online Help for instructions on where to find a list of supported browsers. The Browser Check cannot work without JavaScript.

You must Java enable your browser before checking your browser settings. To enable an Internet Explorer browser for JavaScript: 1. From the Tools menu, select Internet Options. The Internet Options dialog box appears. 2.

Click the Security tab. 3. Click Internet. 4. Click Custom Level. The Security Settings dialog box appears. Checking your browser configuration 28 InfoView User's Guide 5. Scroll down to the Microsoft VM - Java permissions heading and select the safety level you want. If Java permissions are not available as an option, you must install a more recent version of the browser. 6.

Click OK. A confirmation window appears. 7. Click Yes. Your browser is now JavaScript-enabled. 8. Click OK to save your settings and close the Internet Options dialog box. Enabling your browser for cookies To cookies enable a Microsoft Internet Explorer 5.5 browser: 1. On the browser window click Tools. An Internet Options dialogue box appears. 2. Select the Security tab. 3. Click Custom Level.

A security Settings dialog box appears. 4. Scroll down to the section called Cookies. 5. Select one of the following options: - Prompt--if you want a message to appear before each time it writes something to your environment.

- Select Enable--if you do not want to see a message appear each time cookies are about to be downloaded. 6. Go back to the Browser Check page and run the browser check again. Checking your browser configuration The Browser Check option verifies whether your browser is correctly configured for InfoView. It does not indicate whether or not the browser you are using is one that is supported by Business Objects. You must compare your configuration with the list of supported browsers that we provide. Getting Up and Running InfoView User's Guide 29 To check your browser settings: 1. Start your Internet browser. 2. Point your browser to InfoView using either the bookmark or the URL your InfoView system administrator has given you.

The InfoView login page appears. If your login page does not look like this, your system administrator may have customized it for use in your company or organization. 3. Click Click here to check your browser's configuration. The Browser Check page opens. Checking your browser configuration 30 InfoView User's Guide 4. Click Check Browser. After a few seconds, InfoView displays information about the browser you are currently using in the Client Configuration Details section of the page. However, you are not told if this browser is supported. For information on supported browsers, refer to the Online Help.

5. Click Back to Login to return to the InfoView login page. Getting Up and Running InfoView User's Guide 31 Logging into InfoView To log into InfoView, you need the following from your InfoView system administrator: · Your user name and password If you are already a BusinessObjects user, you can use your BusinessObjects user ID and password to log into InfoView · The URL or a bookmark which allows you to access InfoView NOTE Depending on how your system administrator has set up your account, the pages giving you access to InfoView may not resemble the pages displayed below. You may not even be prompted for a user name and password. If you need help launching InfoView, contact your system administrator.

To log in: 1. Start your Internet browser. 2. Point your browser to InfoView using either the bookmark or the URL your system administrator has given you. The InfoView login page opens.

3. Click Log In. The Name and Password fields appear. Logging into InfoView 32 InfoView User's Guide 4. Enter your user name and password. 5. Click OK. Your InfoView start page appears and you can begin working in InfoView. NOTE To work in multiple windows at the same time, log into InfoView again in a separate browser window. Using the multilingual feature InfoView now lets you log into InfoView using your preferred language of choice.

International users wishing to use a language other than the default language (browser or cluster locale) may now do so at the login level. To log in to InfoView using your language of choice: 1. Start your Internet browser. 2. Point your browser to InfoView using either the bookmark or the URL your system administrator has given you. The InfoView login page opens. Getting Up and Running InfoView User's Guide 33 3. In the International Users section, click the link. The following page appears. 4.

Select the language from the list and click on it. 5. InfoView automatically returns to the login page displayed in the desired language. Only languages that are currently supported localized languages and are installed are available. To return to the original user locale language, select Automatic from the list of languages.

NOTE The user preferred language can still be set in the Options page. For more information on this feature, please see The Options page on page 42. Logging into InfoView 34 InfoView User's Guide Logging out of InfoView You log out of InfoView by clicking the Logout button in the InfoView toolbar. If you leave InfoView inactive longer than the maximum time period defined by your system administrator, your session is closed automatically, and you must log in again. NOTE When you have finished using InfoView, log out of the product instead of just closing your browser.

This enables you to save any settings you may have changed, and it helps InfoView system administrators keep track of which users are logged into the system and active at any given time. This allows them to configure the system to handle transaction loads more efficiently. To log out: 1. Click the Logout button in the InfoView toolbar. A confirmation window appears. Getting Up and Running InfoView User's Guide 35 2. Click Logout. If you have made any changes to your user options, and have not saved them, a Keep my settings option appears. 3. By default, your settings are retained.

To revert to your previous settings, select No. 4. Click Logout. The Login page appears. You have logged out. If you decide not to log out, click Cancel. You are returned to the last page you visited, but any changes you made to your settings are not saved. Logging out of InfoView 36 InfoView User's Guide Getting help The context-sensitive InfoView online help provides you with a detailed description of both InfoView and the concepts behind it, as well as complete instructions for using the product, every step of the way.



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To access the InfoView and WebIntelligence online help: · From the InfoView Login page, click the Online Help link. · From the Home page, click the Online Help link.

· From anywhere within the product, click the Help icon on the InfoView toolbar. The InfoView and WebIntelligence Online Help page is displayed. The InfoView Help window has two frames, making navigation easy no matter where you are. The navigation frame is resizable, and consists of: · an expandable and collapsible table of contents · a multi-level index with keyword search functionality · a search facility When you launch the help, it displays the content of individual help topics that relate to the actions you are performing. Where relevant, it also contains links to related help topics, to online guides in PDF format, or to multimedia demonstrations.

Getting Up and Running InfoView Page Layout chapter 38 InfoView User's Guide Overview This chapter provides an introduction to the new InfoView page layout. It gives a brief description of each area of InfoView, with links to other chapters where the features are explained in more detail and instructions given on how to use them. InfoView pages have two parts: · The InfoView toolbar with links to other pages and the online help. · The page contents with links to document lists, and the navigation bar with links to the other principle pages in InfoView: The page contents The InfoView toolbar This image shows the standard InfoView page containing a toolbar and page contents. InfoView Page Layout InfoView User's Guide 39 The InfoView toolbar The InfoView toolbar appears throughout the product.

It does not change as you navigate through different pages. It includes links to the following pages: · Home · My InfoView · Options · Help · Logout This image shows the InfoView toolbar. The rest of this chapter provides a brief introduction to each of these pages, and explains where you can find more information. The Home page The Home page is the main page of InfoView. It gives you direct access, depending on your rights, to: · Corporate Documents · Personal Documents · New Documents · Scheduled Documents Unless your system administrator has created a default page, the Home page is the first page to open when you log into InfoView. The Home page is your base for viewing, managing, and distributing the documents in your corporate database, including WebIntelligence and BusinessObjects documents. The InfoView toolbar 40 InfoView User's Guide An example Home page is shown below: This image shows an example of the Home page. REMINDER You only see the document areas you have rights to access and manage. If you have a question regarding your user rights, ask your system administrator. You can define a different start page by simply selecting the default page you want from the list in the Options page: This image shows the Options page.

For more information, refer to Selecting your default start page on page 69. InfoView Page Layout InfoView User's Guide 41 My InfoView My InfoView can display data from a variety of sources in a single web page. You can set up InfoView to display the information most important to you by adding portlets. A portlet is a part of a browser page; each one can display different content. In this way, you can view information from different sources at the same time in your browser window. You can add as many portlets as you like to My InfoView. The image below shows My InfoView set up with four portlets, with the left column as medium size. This image shows MyInfoView set up with four portlets, with the left column as medium size. The default My InfoView page welcomes you to the product and gives you a quick introduction to InfoView. The InfoView toolbar 42 InfoView User's Guide It also contains links to the online help, where you are introduced to the basic concepts of InfoView: For more information about My InfoView and how to customize it, refer to Adding documents to My InfoView on page 92.

The Options page The Options page is where you define all your InfoView settings. The available tabs are: · Display · List · View · Create/Edit · Password · About InfoView Page Layout InfoView User's Guide 43 Display The Display tab options enable you to: · Select your default start page. · Select the default skin you want to use. · Select the language you want to use. · Specify the width of the left column in My InfoView.

· Add a portlet to My InfoView. This image shows the Display tab in the Options page. For more information, refer to Customizing InfoView on page 67. The InfoView toolbar 44 InfoView User's Guide List The List tab options enable you to: · Specify how you want to refresh your document lists. · Choose a default category for your Corporate Documents and Personal Documents lists.

This image shows the List tab in the Options page. For more information, refer to Refreshing documents on page 108. InfoView Page Layout InfoView User's Guide 45 View The View tab options enable you to select the format in which you want to view your WebIntelligence and BusinessObjects documents: · For WebIntelligence, you can also choose your drill options. · For BusinessObjects, you can also choose to download BusinessObjects if it is not already installed on your local machine. This image shows the View tab in the Options page. For more information, refer to Viewing and Refreshing Documents on page 95.

The InfoView toolbar 46 InfoView User's Guide Create/Edit The Create/Edit tab options are displayed if you have the rights to create and edit documents. This tab enables you to: · Select the default type of document you want to create. · Select the report panel to use to create and edit your WebIntelligence documents. This image shows the Create/Edit tab in the Options page.

For more information, refer to Creating and Editing Documents on page 113. Password The Password tab is displayed if you have the rights to change your password. This image shows the Password tab in the Options page. For more information, refer to Changing your password on page 82. InfoView Page

Layout InfoView User's Guide 47 About The About tab shows you the products you have installed, and their version numbers. This image shows the About tab in the Options page. The Help pages From anywhere within InfoView, click the Help icon on the InfoView toolbar and the context-sensitive InfoView and

WebIntelligence Online Help page is displayed. This image shows the InfoView online help. For more information, refer to Getting help on page 36. The InfoView toolbar 48 InfoView User's Guide The Logout icon You can also log out of InfoView anytime you like by clicking the Logout icon in the InfoView toolbar.



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For more information, refer to Logging out of InfoView on page 34. InfoView Page Layout InfoView User's Guide 49 The page contents The page contents occupy the largest frame in the browser window. The contents change as you navigate from page to page. The Home page is the main page of your portal and gives you direct access to the main areas of InfoView. The following section describes the contents of the Home page.

Corporate Documents The Corporate Documents page is a catalog of all the documents to which you are allowed access in the corporate repository, the centralized BusinessObjects storage and distribution mechanism that manages universes, user information, and document exchange. As long as you have the right to view a single corporate document, InfoView contains a Corporate Documents page. To access the Corporate Documents page, click either the Corporate Documents title or its icon. Corporate Documents icon Corporate Documents title This image shows the Corporate Documents title and icon. For more information, refer to Accessing documents on page 59 and Document types on page 125.

The page contents 50 InfoView User's Guide Search InfoView manages a large number of documents. To make it easy to find the document you need, you can search for documents by name. For more information, refer to Searching for documents on page 63. Advanced Search The advanced search allows you to search using the document name, sender/publisher name, keywords, date of last modification, and document location (Corporate Documents, Personal Documents and your Inbox). You can even combine two or more of these search criteria to fine-tune your search and return a more accurate set of search results. For more information, refer to Searching for documents on page 63. Personal Documents The Personal Documents page lists the documents you have saved for your own personal use. To access the Personal Documents page, from the Home page, click either the Personal Documents title or its icon: Personal Documents icon Personal Documents title This image shows the Personal Documents title and icon. For more information, refer to Accessing documents on page 59 and Document types on page 125. Inbox The Inbox page contains the documents that other users have sent you.

Unread documents are marked with a closed envelope. Click the envelope or the document name to open the document. For more information, refer to Document types on page 125. InfoView Page Layout InfoView User's Guide 51 New Document The New Document option enables you to: · create documents directly from a universe--for BusinessObjects and WebIntelligence documents, or from an OLAP data source--for WebIntelligence OLAP documents. For more information, refer to Creating and Editing Documents on page 113. · Add documents other than WebIntelligence or BusinessObjects documents to your portal from your computer. For more information, refer to Adding a document to InfoView on page 127. To access these options, click the appropriate link in the New Documents section: This image shows the New Documents section and its available links. Scheduled Documents From the Scheduled Documents option, you can view the list of documents that you have scheduled in Broadcast Agent, and check their status. To access this list, click either the Scheduled Documents title or its icon: Scheduled Documents icon Scheduled Documents title This image shows the Scheduled Documents title and icon.

For more information, refer to Scheduling documents on page 167. The page contents 52 InfoView User's Guide Navigation bar The navigation bar at the bottom of the page allows quick and easy access to the different areas of the Home page while you are navigating in InfoView: This image shows the Navigation bar. The navigation bar is available: · in the Home Page · when viewing document lists · in the Corporate Documents and Personal Documents pages · in data source lists · in the Scheduled Documents page The navigation bar is not available: · when using the Document Viewer · in My InfoView · when saving documents · when sending documents · in the Options pages · when using the search page · when adding documents · when logging out NOTE If the page contains too much data, you may need to scroll down to see the navigation bar. InfoView Page Layout Getting to the Documents You Need chapter 54 InfoView User's Guide Overview This chapter explains how you can quickly navigate in InfoView to find the documents you need to work with. It explains how to access other parts of InfoView from the Home page, describes the different InfoView document types, and introduces the concept of categories.

By default, the Home page is the first page that opens when you open InfoView. However, you can change your default page to one of your choice, as explained in Chapter 5 Customizing InfoView. The Home page gives you direct access to the main areas of the InfoView portal. It provides links to the different document lists. These are: · Corporate Documents Takes you to a list of documents in the Corporate Documents page.

· Personal Documents Takes you to a list of documents in your Personal Documents page. · New Documents Lets you create documents. · Scheduled Documents Shows documents that have been sent to Broadcast Agent. To access one of these lists, click either the icon and title of the list you want. Getting to the Documents You Need InfoView User's Guide 55 Navigating in InfoView You can access existing documents from document lists in the Corporate Documents page and Personal Documents page. You can access your inbox documents from the Personal Documents page. The documents in your inbox are the documents that other users have sent you. All users have the rights to access their own Personal, Corporate and Inbox Document pages; this depends on whether you have been granted the rights by your system administrator. Document lists can include WebIntelligence and BusinessObjects documents, as well as any other documents that have been saved to the system. You can recognize each type of document by the icon preceding the document in the list.

You can sort the order in which document lists are displayed. To find out how to do this, refer to Managing Documents on page 123. Document lists display the following information: · the document name and type · the name of the document sender/publisher (for corporate documents) · the date the document was last updated · the file size Navigating in InfoView 56 InfoView User's Guide The Corporate Documents page The Corporate Documents link takes you to the list of documents you are allowed to access in the corporate repository. All categories are shown, as well as: · a link to a list of all documents in the corporate repository, regardless of the categories to which they have been assigned · a link to the list of documents that have not been categorized If you have the rights you can rename, add, edit and delete documents in this category list.



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For more information, refer to *The Corporate Documents page* on page 56. You can search for documents in your Corporate Documents area. Refer to *Searching for documents* on page 63 for more information. Getting to the Documents You Need InfoView User's Guide 57 Your Personal Documents page The

Personal Documents link takes you to the lists of documents you have saved for your personal use. These can be documents you have created, corporate documents of which you have saved a personal copy, or documents sent to you by other users that you have saved. As with the Corporate Documents page, this page displays all the categories you have created, and a link to the list of documents that you have not categorized.

From here you can view: · individual categories that you have created · all the documents in your personal document list, regardless of the categories to which you have assigned them · the documents in your inbox Navigating in InfoView 58 InfoView User's Guide Inbox documents To access the list of documents in your inbox, click the Inbox link. Unread documents are indicated by a closed envelope. To open a document, click the document name. Getting to the Documents You Need InfoView User's Guide 59 Accessing documents This section describes how you access documents from: · the Corporate Documents page · your Personal Documents page · your inbox For information on viewing scheduled documents, refer to *Scheduling documents* on page 167. Accessing documents from the Corporate Documents page Corporate documents are stored in InfoView and are accessible to groups of users across your enterprise.

NOTE Before you select a document, check that your viewing options are set to the format you want. @@To open a document from Corporate Documents: 1. From the Home page, click Corporate Documents. The InfoView Corporate Documents page appears. 2.

The next step depends on whether you want to select a document from the list of documents in Corporate Documents, or whether you want to search for the document using a particular word: If you want to... select a document from the list of documents in Corporate Documents, then... click the name of the category in which the document is stored, or All Documents. search for a document in type the name of the document, or part of the name, Corporate Documents, in the Search box, then click Search. For information about advanced search options, refer to *Searching for documents* on page 63. Accessing documents 60 InfoView User's Guide If you clicked a category name, the documents in that category are listed.

For each document, the list displays: - the document title - the name of the document's sender/publisher - the date on which the document was created - the document size 3. Click the title of the document you want to view. The document either opens directly or, if the document contains prompts, you are prompted to enter values before you can view the contents. For information on prompts and information on filling in prompt values, refer to *Prompts* on page 110.

Accessing documents from your Personal Documents page Your Personal Documents page is your personal storage space in InfoView. Only you can access documents stored here. You can access documents in two places on your Personal Documents page: · Personal Documents--your personal file storage space. · Inbox--the documents other users have sent you. The following section tells you how to access both. Opening a document in your Personal Documents page To open a document in your Personal Documents page: 1.

From the Home page, click Personal Documents. Your InfoView Personal Documents page appears. Getting to the Documents You Need InfoView User's Guide 61 2. Click the name of the category in which the document is stored, or All Documents. Your personal documents are listed.

3. Click the title of the document you want to view. The document either opens directly or, if the document contains prompts, you are prompted to enter values before you can view the contents. For information about filling in prompt values before displaying documents, refer to *Viewing documents with prompts* on page 110. Accessing documents 62 InfoView User's Guide Accessing new documents in your inbox To access the documents other users have sent you: 1.

From the Home page, click Personal Documents. Your InfoView Personal Documents page appears. If you have documents waiting in your Inbox, the Inbox link changes to an open envelope with a yellow arrow as shown here on the left. 2. Click the Inbox link: If... you have no new mail waiting, then the link looks like this...

you have new mail waiting, The list of documents in your Inbox appears. NOTE The envelope does not change to indicate that you have received a new document in your Inbox while you are logged in. To see any documents that you receive while you are logged in, you must refresh the Inbox list. InfoView does not automatically delete inbox documents once you have read them. To prevent this page from becoming difficult to manage, save documents you have read to your Personal Documents page, and delete the documents that you do not need. TIP You can also access your inbox direct from the InfoView Home page by clicking the Inbox link in the Personal Documents area of the page. Getting to the Documents You Need InfoView User's Guide 63 Searching for documents InfoView manages a large number of documents. To make it easy to find the information you need, you can search for documents in two ways: · based on a document's name · using advanced search criteria, such as sender/publisher name, keywords, and date of last modification You cannot search more than one storage area at a time. That is, you cannot search through the corporate documents in the repository and your personal documents stored on the InfoView server at the same time. Name-based search If you know at least part of the document's name, you can use the Search feature. This feature allows you to search for document names. To use the search: 1. Select the area in which you want to search; Corporate Documents, Personal

Documents, or Inbox. 2. The search option is displayed.

3. Type the name, or part of the name of the document you want to search for. 4. Click Search. InfoView returns a list of documents whose names contains the text you searched for.

Searching for documents 64 InfoView User's Guide Advanced search based on multiple criteria The advanced search allows you to search using the document name, sender/ publisher name, keywords, date of last modification, and document location. To use the advanced search: 1. Select the area in which you want to search; Corporate Documents, Personal Documents, or Inbox. 2. Click the Advanced link under the Search box. The Search Documents page appears. 3. Select the area in which you want to search: Corporate Documents, Personal Documents, or Inbox Documents.



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Getting to the Documents You Need InfoView User's Guide 65 4. Enter values for one or all of the fields, as described in the table below.

Field name Document name contains Description When searching, you do not need to enter the entire document name. For example, if you want to search for a document entitled "Revenue by quarter and sales district," just enter the word "Revenue". However, if you use too common a word, the search may take a long time, or return too many document names to be useful. Sender/Publisher Name Enter some or all of the name you want to search for. contains You can launch a search either by entering the entire name, or a partial name. Keywords contains Enter keywords that may be associated with the document that you are looking for. Select how you want the results shown or sorted. This can be by document name, sender/publisher name, size, or type. 5. Indicate how you want to sort results.

6. If you want, you can also specify a range of dates for the search. These dates relate to the last time the document was last modified. If you enter start and end dates in the boxes (Month/Day/ Year), only documents that were last modified on or between the dates you specify are returned as a result of the search.

NOTE A pop-up calendar is now available to make date selection easier.

However, when viewing a WebIntelligence report, if you choose a list of values with a date object, a traditional down-down box appears. The pop-up calendar appears if you uncheck this option. 7. Click OK. Once InfoView returns a list of matching documents, you can view any of them by clicking the document's name in the list.

Searching for documents 66 InfoView User's Guide · Tips for using the advanced search The keywords field in BusinessObjects documents is treated as one field, which means that order in which the words are entered in this field, and any punctuation you include in your search, affect your search results.

However, Business Objects recommends searching for one key word at a time. The creation, first publication, and first saved dates are not taken into account in this search. The only date that is matched is the date on which the document was last saved to the selected storage area. Getting to the Documents You Need Customizing InfoView chapter 68 InfoView User's Guide Overview This chapter explains how to customize InfoView so that it is tailored to meet your needs. You do this via the Options pages. The options are divided into six tabs: · Display · List · View · Create/Edit · Password · About These tabs contain the settings that allow you define what InfoView looks like, what type of documents you create, and how you view documents. The options available to you depend on the rights that your system administrator gives you. You do not have to set your options each time you log into InfoView. Your settings apply until you change them again.

NOTE For every change in the Options pages, you can choose to: · Click Apply to confirm your choice and stay on the Options pages to make more changes. · Click OK to save your changes and exit the Options pages. · Click Close to exit the Options pages and cancel your changes, as long as you have not already clicked Apply. Customizing InfoView InfoView User's Guide 69 Changing the appearance of InfoView The Display tab lets you: · select your default start page · select your default skin · specify the width of the left column of My InfoView · add a portlet to My InfoView For more information, refer to Customizing My InfoView on page 83. Selecting your default start page You can set any of the following pages as your default start page: · Home · My InfoView · Corporate Documents · Personal Documents · Inbox Documents To select your default start page: 1. Click the Options icon on the InfoView toolbar. The Options page appears. 2. Click the Display tab. The Display tab appears.

3. Select your default start page from the options: This image shows the Default start page options. 4. Click Apply. Changing the appearance of InfoView 70 InfoView User's Guide Selecting your default skin InfoView comes with a set of skins that enable you to change the look and feel of your portal without any programming.

Skins are sets of images and styles that alter the interface's colors, fonts, graphics, icons, and the toolbars that determine the interface's functionality. Your company administrator can also create a custom company skin to make InfoView appear to be designed specifically for your company. For more information, refer to the Customizing Enterprise 6 without Programming guide. To select the skin for your default start page: 1. Click the Options icon on the InfoView toolbar. The Options page appears. 2. Click the Display tab. The Display tab appears. 3. Select the skin you want from the list of options: This image shows the three skins available in the Options page. 4. Click Apply to confirm your choice and stay on the Options page to make more changes. Customizing InfoView InfoView User's Guide 71 Resizing the left pane of My InfoView You can specify the width of the left pane in My InfoView. To do this: 1.

Click the Options icon on the InfoView toolbar. The Options page appears. 2. Click the Display tab. The Display tab appears. 3. Select the width of the pane you want from the list of options: This image shows the three left column width options available in the Option page. 4. Click Apply. 5.

For more information about how this changes the look of InfoView, refer to Working with portlets on page 85. Changing the appearance of InfoView 72 InfoView User's Guide Specifying your document list settings The List tab lets you: · set the default category for the Corporate Documents and Personal Documents list · specify how you want to refresh the Corporate Documents page, your Universe list, and your Inbox For information about refreshing individual documents, refer to Refreshing documents on page 108. Setting default categories You can specify default categories for both the Corporate Documents page and your Personal Documents page. If you do so, the category you choose is displayed instead of the list of all of the categories in the storage area. To specify a default category: 1.

From your Home page, under Corporate Documents, click the category that you want to make your default category, for example, sales. The page containing that category opens. 2. With that page open, click the Options icon in the InfoView toolbar. The Options page appears.

3. Click the List tab. The List tab appears. 4. To specify a default category for the Corporate Documents page, select the Customizing InfoView InfoView User's Guide 73 category you want from the Change Default Category drop-down list in the Corporate Documents List section.



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<http://yourpdfguides.com/dref/3757177>

You can select one of the following: - No Default Category - The category corresponding to the open page, in this case, sales. 5. To specify a default category for your Personal Documents page, select the category you want from the Change Default Category drop-down list in the Corporate Documents List section. 6. Click Apply.

Specifying document list refresh options Each document list displays the last time it was refreshed. You can define when you want to refresh: · the Corporate Documents page · your Inbox · your universe list To define your refresh options: 1. Click the Options icon in the InfoView toolbar. The Options page appears.

2. Click the List tab. The List tab appears. 3. Use the Every visit to Corporate Documents option to indicate how to refresh Specifying your document list settings 74 InfoView User's Guide the Corporate Documents page. By default, this option is not selected, which means that the Corporate Documents page is refreshed with the same frequency as the InfoView server.

The login process is generally faster if you keep the default setting. 4. To specify a refresh option for your inbox, select either At login only or Every visit to inbox in the Inbox Document List section. Customizing InfoView InfoView User's Guide 75 5. To specify a refresh option for your universe list, select either At login only or Every visit to inbox in the Universe List section: 6.

Click Apply. Specifying your document list settings 76 InfoView User's Guide Specifying your document viewing format The View tab lets you choose the format in which to view your documents. Setting WebIntelligence view and drill options For WebIntelligence documents, you can specify: · the view format · drill options To specify these: 1. Click the Options icon in the InfoView toolbar. The Options page appears.

2. Click the View tab. The View tab appears. 3. Select the format in which you want to view your documents: HTML, HTML (Interactive), or PDF. For more information about these formats, refer to Viewing WebIntelligence documents on page 97. NOTE If you want to use the drilling options, you must select either HTML or HTML Interactive. 4. Specify the drill options you want to use. Drilling enables you to view additional data that is not initially displayed when Customizing InfoView InfoView User's Guide 77 you view a document--it takes you to the next level of information.

The table below explains the difference between the viewing options. If you select... HTML in drill mode, you can... in view mode, you can... drill. N/A filter and sort. HTML (Interactive) drill and sort. NOTE These viewing options do not apply for WebIntelligence 2.x documents.

You view these in HTML. Specifying your document viewing format 78 InfoView User's Guide 5. Select the appropriate drill options, as explained in the following table: If you want WebIntelligence to...

then... make a copy of an existing report and click Start drill on duplicate report. then drill on the duplicate drill on the existing report without making a copy prompt you if a drill action requires a new query to extend the scope of analysis click Start drill on existing report. select the Prompt if drill requires additional data check box. By default, InfoView does not prompt you when running a new query. synchronize drilling on all report blocks select the Synchronize drill on report blocks check box. By default, InfoView drills only on the current table or chart. hide the Drill toolbar when you switch to drill mode select the Hide drill bar check box.

By default, InfoView displays the Drill toolbar when you switch to drill mode. 6. Click Apply. Customizing InfoView InfoView User's Guide 79 Specifying how to view BusinessObjects documents You can view BusinessObjects documents either with BusinessObjects or in a browser with InfoView. To select a view format: 1. Click the Options icon in the InfoView toolbar. The Options page appears. 2. Click the View tab. The View tab appears.

3. Select a view format: HTML, PDF in InfoView, Enhanced Document Format, or BusinessObjects format. For more information about these formats, refer to Viewing WebIntelligence documents on page 97. 4. If you do not have BusinessObjects installed you can install it now.

5. For more information, refer to Installing BusinessObjects when viewing a document on page 105. 6. Click Apply. Specifying your document viewing format 80 InfoView User's Guide Specifying your user settings The Create/Edit page lets you define options for creating reports.

You can select the type of document you want to create--WebIntelligence or BusinessObjects. By default, the document type is WebIntelligence and the report panel is Java. Selecting the type of document you want to create You can choose to create a WebIntelligence, WebIntelligence OLAP or a BusinessObjects document. Creating a WebIntelligence document You create and edit WebIntelligence documents by launching a WebIntelligence report panel from InfoView.

Each report panel is designed for different query and reporting needs. To decide which panel to choose, refer to the Getting Started with WebIntelligence Guide. To select the report panel from InfoView: 1. Click the Options icon in the InfoView toolbar. The Options page appears. 2.

Click the Create/Edit tab. The Create/Edit tab appears. 3. Select WebIntelligence. 4. If you want to set a default universe, click Select Default Universe. The Default Universe Setting page appears. 5. 6. 7.

8. Select the universe you want to set as your default. Click OK. Select a report panel to use. Click Apply.

Customizing InfoView InfoView User's Guide 81 Creating a WebIntelligence OLAP document You build reports on multidimensional data sources using WebIntelligence for OLAP Data Sources. To select the report panel from InfoView: 1. Click the Options icon in the InfoView toolbar. The Options page appears. 2.

Click the Create/Edit tab. The Create/Edit tab appears. 3. Select WebIntelligence OLAP. 4. Click Apply. For more information, refer to the WebIntelligence for OLAP User's Guide. Creating a BusinessObjects document To select BusinessObjects as your default report editor, from InfoView: 1. Click the Options icon in the InfoView toolbar. The Options page appears.

2. Click the Create/Edit tab. The Create/Edit tab appears. 3. Select BusinessObjects. 4. If you do not have BusinessObjects installed, you can install it now. If you choose not to do so, the installation process launches automatically the first you need BusinessObjects for viewing a document. For more information, refer to Installing BusinessObjects when viewing a document on page 105. 5.

Click Apply. Specifying your user settings 82 InfoView User's Guide Changing your password Your initial InfoView password is created by the system administrator who defined your user profile. Once you have logged into InfoView you can change your password to one of your choice, if you have the rights to do so.



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