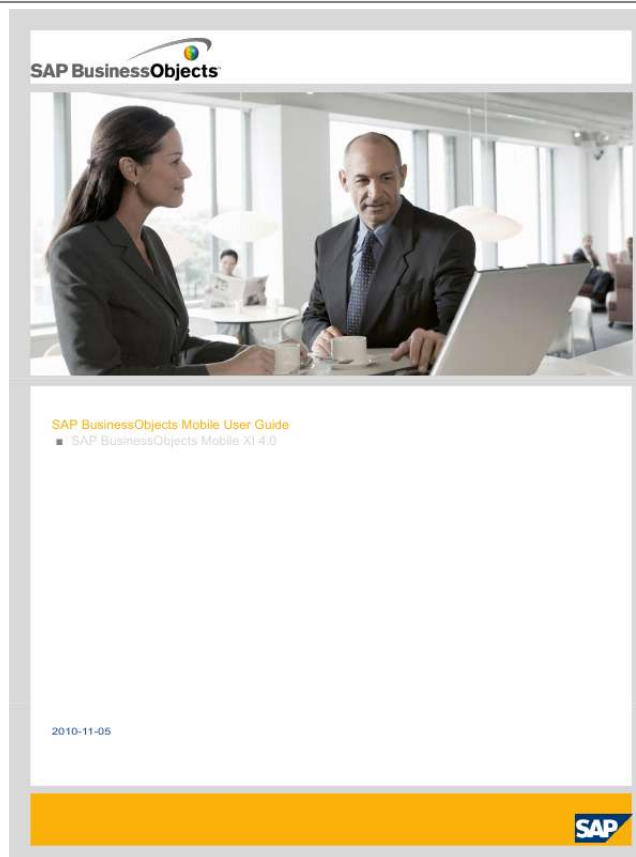




Your PDF Guides

You can read the recommendations in the user guide, the technical guide or the installation guide for BUSINESS OBJECTS MOBILE XI 4.0. You'll find the answers to all your questions on the BUSINESS OBJECTS MOBILE XI 4.0 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 MOBILE XI 4.0
User guide BUSINESS OBJECTS MOBILE XI 4.0
Operating instructions BUSINESS OBJECTS MOBILE XI 4.0
Instructions for use BUSINESS OBJECTS MOBILE XI 4.0
Instruction manual BUSINESS OBJECTS MOBILE XI 4.0



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Manual abstract:

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Contact your IT administrator to obtain the web site URL.

· If you want to download the Mobile client application to a BlackBerry device registered on your corporate BlackBerry Enterprise Server (BES), your IT administrator can push the SAP BusinessObjects Mobile client application to your BlackBerry, so that the application is downloaded automatically.

Download the client application from your desktop computer using another data transmission method, like the data cable supplied with your device or Bluetooth technology, using the Desktop Manager software supplied by your device manufacturer. It is recommended that only IT and technical specialists use this method to download the application. This download option is of interest if administrators or power users want to test the application on a single device. Related Topics · Downloading the SAP BusinessObjects Mobile client application from a web site · Launching SAP BusinessObjects Mobile · 3.1.1 Device prerequisites and device type support For complete list of supported devices, databases, and operating systems, see Products Availability Report (PAR) document available at: <http://service.sap.com/bosap-support> 11 2010-11-05 Downloading the Application to your Mobile 3.1.2 Downloading the SAP BusinessObjects Mobile client application from a web site Before you proceed to download the SAP BusinessObjects Mobile application to your device: · verify that your mobile device model is listed among the supported mobile Smartphones or devices You can either consult your IT administrator for this information or visit the SAP BusinessObjects supported platforms web site page at: <http://service.sap.com/bosap-support> · obtain the application download web site URL from your IT administrator To download the SAP BusinessObjects Mobile client application using OTA (Over-The-Air) protocol: 1. Navigate to the download website in one of the following ways: · Launch the web browser option on your device, and then type in the URL of the SAP BusinessObjects Mobile client application download page provided to you by your IT administrator. · If your IT administrator sends you the link to the server directly via email or SMS, click the link in the message to go directly to the download website.

The website automatically detects your device type and selects the appropriate version of the client application for you to download. 2. If the automatic selection is disabled, you can manually select the appropriate version from a list. 3. Click Download. The SAP BusinessObjects Mobile application is downloaded to your device. The SAP BusinessObjects Mobile icon appears with the other applications icons. Related Topics · Configuring your device to access the SAP BusinessObjects Enterprise server 3.2 Restrictions and recommendations for specific mobile devices Due to design differences between mobile devices and the operating systems they use, your experience of SAP BusinessObjects Mobile can vary depending on the phone or device you use. Menu options and workflows Most SAP BusinessObjects Mobile menu options and workflows are the same regardless of which mobile device you use.

However, some device-specific menus and options can alter the display of the SAP BusinessObjects Mobile menus. 12 2010-11-05 Downloading the Application to your Mobile Installation folder name The installation folder in which the SAP BusinessObjects Mobile application is installed can differ depending on your phone and mobile operator. Related Topics · Device prerequisites and device type support 13 2010-11-05 Downloading the Application to your Mobile 14 2010-11-05 Accessing SAP BusinessObjects Mobile Accessing SAP BusinessObjects Mobile 4.1 Launching SAP BusinessObjects Mobile The SAP BusinessObjects Mobile icon appears with the icons for the other applications on your mobile device. · To launch SAP BusinessObjects Mobile, select the SAP BusinessObjects Mobile application icon, and depending on the type of device you are using: · Double-click the wheel. · Click the center button. · Select the application icon on the device touch screen with a stylus. The SAP BusinessObjects Mobile splash screen displays for a few seconds. You are ready to log into the SAP BusinessObjects Enterprise server. Related Topics · Logging into SAP BusinessObjects Mobile · Running SAP BusinessObjects Mobile in the background 4.

2 Configuring your device to access the SAP BusinessObjects Enterprise server Before you configure your device to connect to the SAP BusinessObjects Enterprise server, obtain the following details: · the SAP BusinessObjects Mobile server name · the proxy server port · the CMS name · the server authentication type These details can be obtained from your IT administrator. If your IT administrator pre-configures the SAP BusinessObjects Mobile application before it is downloaded to your device, connection to the SAP BusinessObjects Enterprise server is automatic and configuration is not necessary.

However, if the application was not pre-configured, then the first time 15 2010-11-05 Accessing SAP BusinessObjects Mobile you connect to the SAP BusinessObjects Enterprise server, you must enter the connection and authentication information manually. To enter the connection and authentication information: 1. Launch the SAP BusinessObjects Mobile application on your mobile device. The Login screen appears. 2. Launch the device menu, and then select Connection settings. 3. On the "Connection Settings" screen, specify the following: a.

In the Mobile Server field, enter the Mobile server name provided to you by your IT administrator. If you are connecting to a BlackBerry Internet Server (BIS), type "!" at the end of the server name. If you are connecting to the Mobile server via a Direct TCP connection, type "*" at the end of the server name. b. In the Port nbr field, enter the proxy server port provided to you by your IT administrator. c. In the CMS name field, enter the SAP BusinessObjects Enterprise server name provided to you by your IT administrator. d. In the Auth. Method field, select the authentication method set up for you by your IT administrator.

The options are: · Enterprise · LDAP · Windows AD · SAP R3 4. Launch the menu and select one of the following: · Select Save to save your changes. · Select Back to cancel your changes. 5. Return to the "Login" screen.

Related Topics · Logging into SAP BusinessObjects Mobile · Connecting automatically 4.3 Logging into SAP BusinessObjects Mobile Once you have launched the SAP BusinessObjects Mobile application on your mobile device, enter valid login credentials to access your local documents and SAP BusinessObjects Enterprise server documents. Note: The IT administrator must grant you the appropriate rights for you to access and interact with documents via SAP BusinessObjects Mobile.



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To log into SAP BusinessObjects Mobile: 16 2010-11-05 Accessing SAP BusinessObjects Mobile 1. On the Login page, enter the appropriate information into the following mandatory fields: a.

User - the SAP BusinessObjects user name assigned to you by your IT administrator b. Password - the password you or your administrator define in SAP BusinessObjects BI launch pad 2. If you want to avoid entering your user name and password each time you log into SAP BusinessObjects Mobile, select Save password. Note: You can set your login options so that each time you launch the SAP BusinessObjects Mobile application, you are logged into BusinessObjects Mobile automatically. This saves you time when you want to consult data quickly without spending time on the login procedure. Your connection to your live data on the server is automatic which can pose a security threat if your device is lost or stolen. 3. If you want to start SAP BusinessObjects Mobile automatically each time you switch on the device, select Auto-connect. Note: If you select this option, the Save password option is automatically selected and the Work offline option is disabled. Both options are hidden until you deselect Auto-connect.

4. If you only want to access documents stored locally on your device and not to access the SAP BusinessObjects Enterprise server online, select Work offline. Note: After your first login, you can work with documents stored locally on your device without being connected to the SAP BusinessObjects Enterprise server. This is useful if you are experiencing wireless network issues or simply want to work on business intelligence data while on the move without communication cost. Your first login must be to the SAP BusinessObjects Enterprise server so that you can retrieve server documents and store them locally on your device. On subsequent logins, select this option to choose not to connect to the server and work with previously saved documents. 5. Launch the menu and select Login to access SAP BusinessObjects Mobile. Related Topics · Connecting automatically · Working with documents stored locally on your device · Setting a default folder · Setting a default document 4.3.

1 Accessing SAP BusinessObjects Mobile home page When you connect to the SAP BusinessObjects Mobile application, the application displays the home page containing links to view local documents, server documents, Mobile-ready documents, most recently viewed documents, and a option to search mobile-ready documents. 17 2010-11-05 Accessing SAP BusinessObjects Mobile Note: · If your Mobile-ready documents link does not display any documents, then it signifies that your administrator has either not set up the Mobile category, or the document list is empty. You can override the home page behaviour by setting up a default folder or document. For information about setting a default folder or document, refer to the topics in the Related links. To navigate to the home page from anywhere within the application, select the Go to home page option from the menu.

Related Topics · Setting a default document · Setting a default folder 4.3.2 Accessing local and server documents Once you have logged into the SAP BusinessObjects Mobile application on your mobile device, you can choose whether you want to view: · Local documents These documents are stored locally on your device. You can synchronize local documents with the online versions of the same documents as currently published on the SAP BusinessObjects Enterprise server. Note: When you synchronize your mobile device with the SAP BusinessObjects Enterprise server, any local documents that no longer exist on the server are automatically deleted from your device.

For example, if you save a copy of a server document called LocDoc1 to your device and the server version is deleted later, the next time you save a different server document to your device, LocDoc1 is deleted. · Server documents These documents are stored on the SAP BusinessObjects Enterprise server and are therefore only accessible in online mode when you are connected to the server. Related Topics · Logging into SAP BusinessObjects Mobile · Working with documents stored locally on your device 18 2010-11-05 Accessing SAP BusinessObjects Mobile 4.3.3 Connecting automatically You can set your login options to Auto-connect, so that each time you turn on your device, you are logged into the SAP BusinessObjects Enterprise server automatically. This means you can consult BI data quickly without spending time on the login procedure. Note: The duration of a session, as defined by your IT administrator, ensures that SAP BusinessObjects Mobile disconnects from the SAP BusinessObjects server when the application is not used on the device after a specified time. However, when a mobile device has Auto-connect as its default, your password is saved so that your device connects automatically to the server and logs back in automatically whenever your session expires. This means that setting your login to Auto-connect and saving your password on the device can pose a security issue, if you lose your device. To set automatic start: 1.

From the "Login" screen, select Auto-connect. Note: If you select this option, the Save password option is automatically selected and the Work offline option is disabled. Both options are hidden until you deselect Auto-connect. 2. Click Login. You are logged into the application and your automatic login preferences are saved. Related Topics · Removing automatic connection 4.3.3.1 Removing automatic connection Your device is set to launch SAP BusinessObjects Mobile automatically each time you turn on the device.

When Auto-connect is set on your device, you are connected to the SAP BusinessObjects Enterprise server automatically as soon as you turn on the device. You can remove the automatic connection option if you want to launch the application and/or log in manually. Manual login allows you to modify your login information, such as the server name or your password, if necessary. To deselect automatic connection: 1. After login, from the SAP BusinessObjects Mobile application menu, open the "Preferences" menu.

2. Deselect the Auto-connect checkbox. 19 2010-11-05 Accessing SAP BusinessObjects Mobile 3. Click Save. The next time you switch on your device, the "Login" screen will prompt you to log in manually.

Related Topics · Connecting automatically · Logging into SAP BusinessObjects Mobile 4.4 Running SAP BusinessObjects Mobile in the background If you want to work with other tools or applications on your mobile device and remain in contact with the SAP BusinessObjects Enterprise server, you can opt to log in to SAP BusinessObjects Mobile and run the application in the background. When you run the SAP BusinessObjects Mobile application in the background, you are free to interact with other applications and still receive business intelligence documents and alerts; they are pushed from the server to your device as long as you are logged in to the server.



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You can also run SAP BusinessObjects Mobile in the background without logging into the server. In this case, however, you do not receive alerts on your device until you log in. To run SAP BusinessObjects Mobile in the background while you work in another application on your device: 1. Log in to SAP BusinessObjects Mobile. 2. Launch the device menu from any screen within the Mobile application. 3.

Select Hide. SAP BusinessObjects Mobile is sent to the background so you can continue to work with other applications on your device. Note: If the login session times out while the Mobile client is in the background, the application automatically initiates the session. If the session cannot be reinitiated due to an authentication problem, an error message appears. Exit the application and login again. Related Topics · Subscribing to alerts 4.5 Exiting the SAP BusinessObjects Mobile application 20 2010-11-05 Accessing SAP BusinessObjects Mobile Closing the SAP BusinessObjects Mobile application ends your connection with the SAP BusinessObjects Enterprise server. To log out of the SAP BusinessObjects Enterprise server: 1. Display the application menu on the device. 2.

Select Exit. Note: If you are subscribed to any alerts, SAP BusinessObjects Mobile displays a message that informs you that if you exit the application, you cannot receive alerts until you next log in. If you want to continue receiving alerts while using different features or applications on your device, you can opt to run SAP BusinessObjects Mobile in the background. In this case the application is no longer visible, but it continues to run behind your other applications. If you confirm you want to exit the application, SAP BusinessObjects Mobile closes and logs you out of the SAP BusinessObjects Enterprise server.

Related Topics · Logging into SAP BusinessObjects Mobile · Accessing documents · Running SAP BusinessObjects Mobile in the background 21 2010-11-05 Accessing SAP BusinessObjects Mobile 22 2010-11-05 Interacting with Business Intelligence Documents Interacting with Business Intelligence Documents 5.1 Searching documents SAP BusinessObjects Mobile enables you to search BI documents in the Enterprise repository. It provides easy and quick access to BI documents. SAP BusinessObjects Mobile searches the documents that are categorized as "Mobile" and retrieves the list of documents that matches the specified search string. Note: The search feature functions only if your administrator has set up default documents for Mobile.

To search BI documents, perform the following steps: 1. Log on to SAP BusinessObjects Mobile on your mobile device. 2. Click the Search option in the home page, or from the menu, select Search. 3. Enter the search string. 4. From the menu, select Search. The list of documents that matches the specified search string are displayed in the "Search Results" page. 5.

2 Viewing options and defaults You can select from a range of viewing and navigation options to best suit how you want to interact with business intelligence reports and graphical elements, such as graphs. You can also define a default folder, so that each time you log into SAP BusinessObjects Mobile your home page lists the folder that you select as default. Alternatively, if you need to consult the same document repeatedly, you can define that document as your default document so that it opens automatically each time you log in. Related Topics · The Preferences menu · Accessing documents · Setting a default document 23 2010-11-05 Interacting with Business Intelligence Documents · Viewing documents in panoramic mode 5.2.1 Setting your viewing options You can set viewing options to suit the way you want to view reports and charts, and your preferred way to navigate documents. Related Topics · The Preferences menu · Setting a default folder · Setting a default document 5.2.1.1 The Preferences menu You can set general application options in the "Preferences" menu. You can access the "Preferences" menu from any menu that is displayed during your SAP BusinessObjects Mobile session. Option Description Zoom fit to screen Automatically resizes the current selected block of data to fit the mobile device screen. You can set the zoom percentage to a value from 30 through 150 for graphs and charts. Specifies the percentage of the screen used as the increment by which to scroll the display in Panoramic view mode. Stores a default folder, so that each time you log into SAP BusinessObjects Mobile server your welcome page lists the folder you selected as default.

Note: This option only appears on the Preferences menu if you have a default folder specified. Zoom (n%) Scroll step (screen n%) Remember default folder 24 2010-11-05 Interacting with Business Intelligence Documents Option Description Remember default document Stores a default document (local or server) that opens automatically each time you log in. Note: This option only appears on the Preferences menu if you have a default document specified. Show status bar Displays the value of the selected cell and current zoom percentage in a status bar at the bottom of the screen. Saves your login options so that you are connected automatically when you turn on your device.

Uncheck this option to display the manual login screen the next time you turn on your device. Displays the report list when you open an interactive analysis document having multiple reports. Displays the last saved report when you open an interactive analysis document having multiple reports. Opens the report which contains the specified search string as the report name. By default, "mobile" is specified as the search string. Auto-connect Show Report List Open the last saved report Open report name with String: mobile Related Topics · Setting your viewing options · Setting a default document · Setting a default folder ·

Connecting automatically 5.2.2 Viewing documents in panoramic mode You can pan horizontally through wide reports or graphs, by viewing them in panoramic mode. Note: The structure of Crystal reports means that when you navigate reports cell-by-cell via a device, it is difficult to navigate to adjacent cells, but when you view Crystal reports in Panoramic mode, you can easily scroll to specific columns and rows. 25 2010-11-05 Interacting with Business Intelligence Documents Note: When you are in panoramic mode, you cannot activate cell contents.

For example, you cannot drill on values or use embedded actions, such as send SMS. To enter or leave panoramic mode: 1. With a document open on your device, launch the device menu. 2. Select Enter Panoramic mode or Leave Panoramic mode. Related Topics · The Preferences menu · Setting a default folder · Setting a default document 5.2.



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3 *Setting a default folder* When you connect to SAP BusinessObjects Mobile, the application opens the default folder and displays the list of supported documents it contains. To change your preferences so that the application opens to the folder of your choice: 1. Navigate to the desired folder.

2. Open the menu. 3. Select Set as default. Once you have set the default folder, SAP BusinessObjects Mobile jumps straight to this folder at startup. However if you have defined a default document, SAP BusinessObjects Mobile displays the default document instead. Note: You can return to and browse the folder hierarchy from the document display screen by selecting Go to top folder from the menu. Related Topics · Setting a default document · Unselecting a default document or folder 5.2.4 *Setting a default document* 26 2010-11-05 *Interacting with Business Intelligence Documents* If you want to view the same document each time you use SAP BusinessObjects Mobile, then set that document as your default document.

Each time you log into SAP BusinessObjects Mobile, your default document opens automatically. This saves your time in accessing the document. Note: If the default document is stored locally on your mobile device as an offline document, and you delete that document, SAP BusinessObjects Mobile no longer opens that document by default when you log into the application. To set a document as your default document: 1. Open the document you want to set as your default. 2. Select the menu, then select Set as default. Once you have set a default document, SAP BusinessObjects Mobile automatically displays that document whenever you log into the SAP BusinessObjects Enterprise server. To view the list of documents, launch the menu and then select Go to doc list.

Related Topics · Setting a default folder · Unselecting a default document or folder 5.

2.5 *Unselecting a default document or folder* If you have a document set to open by default each time you log into the SAP BusinessObjects Enterprise server and you no longer want that specific document to open automatically, unselect it. To unselect your default document or folder: 1. From within a document or from the "Login" screen, launch the menu and then select Preferences. 2. To unselect a default document, click Keep report default or to unselect a default folder, click Keep folder default. These options only appear in the menu if you have previously set a default document or folder. The next time you log into SAP BusinessObjects Mobile, the home page with mobile related documents appears if your administrator has grouped mobile documents to a category; otherwise the list of documents in the top-level folder on the SAP BusinessObjects Enterprise server appears. Related Topics · Setting a default folder 27 2010-11-05 *Interacting with Business Intelligence Documents* 5.3 *Language support for document viewing* Using SAP BusinessObjects Mobile, you can display documents containing foreign language characters provided you have the related language fonts installed on your device.

For example, an interactive analysis report with Korean text characters displays correctly on a device on which the Korean language character set is installed. 5.4 *Accessing documents* There are various starting points for accessing the documents available to you on the SAP BusinessObjects Enterprise server: · the home page which contains documents that can be viewed on mobile · the Mobile folder under Public Folders or the root folder specified by your IT administrator · a folder you set as your default folder · a document you set as your default document that opens automatically when you log in to the server

Related Topics · Setting a default folder · Setting a default document 5.4.1 *Opening documents* SAP BusinessObjects Mobile supports the following types of business intelligence documents: · Interactive analysis Documents · Crystal reports Note: It is recommended that you only use your mobile device to interact with documents designed specifically for mobile users.

In most cases, these documents are grouped within a folder called Mobile on the SAP BusinessObjects Enterprise server. Your IT or business intelligence administrator can provide more information on the location of mobile documents, if necessary. You can access other documents; however, depending on their size and format, their appearance is limited by the size of your mobile device. To open a document: 28 2010-11-05 *Interacting with Business Intelligence Documents* 1. After logging into the SAP BusinessObjects Enterprise server, select the type of documents you want to access: · Local documents · Server documents · Mobile-ready documents Note: You can also access the most recently viewed documents from the home page.

2. Navigate to the document you want to open and click its title. Note: With touchscreen smartphones, you can open the document/folder/report with a single click on its title. 3. Click Open. The document is opened from the server. If the document you want to open is set to Refresh on open, but you do not have the security right to refresh documents, a message appears indicating that the document cannot be opened. 4. Click Next or Back to navigate between pages. 5.

Use the navigation features available on your device to navigate between document cells. Related Topics · Interactive analysis document features · Crystal reports features 5.4.2 *Supported features in Mobile documents* Depending on the type of document you are viewing via your mobile device, specific features may present some functional limitations. Related Topics · Interactive analysis document features · Crystal reports features 5.4.2.1 *Interactive analysis document features* As a SAP BusinessObjects Mobile user, you can analyze and interact with business intelligence information contained in interactive analysis documents in some ways. 29 2010-11-05 *Interacting with Business Intelligence Documents* Note: There are some navigation, display, and functional differences between interactive analysis documents viewed via a mobile device and a desktop computer. These differences are indicated in the description of each feature.

Drilling to details, aggregate data, and related documents Values in drillable report cells appear with a drill up or drill down arrow next to them or as a hyperlink. Depending on how the report designer has set up the drill hierarchy, you can drill up or down to view details, aggregates or alternative dimensions. If the report designer has included links to related documents, the name of that document appears in a tooltip. Clicking on document link allows you to view more information related to the data in the initial report. Using embedded SMS, Phone and e-mail commands Report cells can contain embedded actions that allow you to send an SMS or e-mail or to make a call to a pre-defined recipient.



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For example, a report row containing results for a specific geographical region can include a cell that allows you to send an SMS to the Sales Manager for that region that comments on the results. Using prompts to filter the values displayed on reports You use prompts with filters so that when you refresh an interactive analysis document, only the results relevant to your analysis are retrieved. Navigating documents containing multiple reports An interactive analysis document can contain one or more reports. If the document contains more than one report, the list of available reports appears. To navigate to the various reports:

· · Display the menu on your device, then select Reports to display the list of reports contained in the document.
Select a report from the list, then select the Open report or click OK. Note: Each report within a interactive analysis document is displayed as specified by the pagination options set up by the creator of the document. One document page corresponds to one screen on your device, to make navigating between pages more efficient. Tracking data changes When Track Data changes is activated in a report, you can see how the data in the current version of the report has changed since the previous version. Refreshing reports to see the latest results on the database When you refresh an interactive analysis document, the latest data is retrieved from the data source and returned to the reports the document contains. @@@@Without opening the document, select the document title. 2. Launch the device menu, and then select Document properties. @@@@For fast navigation, you can use keypad shortcuts. @@Displays row and/or column headers of the table in the report title.

@@@ing Next page Opens the next report page. @@Minimum zoom=30%, Maximum zoom=150%, Increments=10%. @@@@Related Topics · Drilling on a report · Drilling on a graph or chart · Drilling on a report 5.6.1 Drilling on a report Interactive analysis reports can be made drillable by the report creator at design time. Note: · · When you view a report in Panoramic mode drill is not activated. To activate drill capability, launch the application menu from the document and select Leave panoramic mode. You cannot drill on Crystal reports using SAP BusinessObjects Mobile. When you select the cell, an arrow indicates whether you can drill on the cell. To drill on a cell value: · Browse to the cell and do one of the following: · to see aggregated values, select Drill Up to.

· to see a more detailed breakdown of values, select Drill Down to. Related Topics · Drilling on a graph or chart · Drilling across to related reports 5.6.2 Drilling on a graph or chart Graphs and charts are made drillable by the report creator at design time. 34 2010-11-05 Interacting with Business Intelligence Documents Note: When you view a graph or chart in Panoramic mode, drill is not activated.

To activate drill capability, open a document and from the application menu, then select Leave panoramic mode. Drilling on graphs or charts gives you a quick, graphical representation of how summary results relate to detailed values. To drill on a graph or chart: 1. Select and open the graph or chart from the list of available documents. 2.

Scroll or navigate within the graph or chart to the drillable area. 3. From the device menu, select one of the following: · to see aggregated values, select Drill Up to. · to see a more detailed breakdown of values, select Drill Down to. Related Topics · Drilling on a report · Drilling across to related reports 5.6.3 Drilling across to related reports Links from report cells to other documents are set up by the report creator at design time. Note: · · SAP BusinessObjects Mobile does not support links to other documents included in Crystal reports. When you view a report in Panoramic mode, links to other documents are not activated. To activate this capability, select the Preferences menu on your device menu, and then select Leave panoramic mode.

To drill to a related document from a cell value hyperlink: 1. With a cell selected that contains a hyperlink, launch the device menu. 2. Select Open doc The target document opens on the device screen. To return to the original document, use the Back command on the device. Related Topics · Drilling on a report 5.7 Performing follow-up actions 35 2010-11-05 Interacting with Business Intelligence Documents Actions enable you to leverage the context and data displayed on reports to make better and timelier business decisions. SAP BusinessObjects Mobile actions are triggered via hyperlinks embedded within document cells by the report creator at design time. Note: · · If the mobile device you are using does not support the actions present in a report, those actions cannot be used. When you view a report in Panoramic mode, embedded actions are not activated.

To activate actions, select Leave panoramic mode from the application menu. Related Topics · Displaying contact details using elookup/plookup · Sending an SMS · Making a call · Sending an e-mail 5.7.1 Displaying contact details using elookup/plookup Actions are embedded into reports as hyperlinks by the document creator at design time. Note: The lookup action is deprecated in XI 4.

0, and is substituted with elookup and plookup local actions. However, documents designed in earlier releases using lookup action still works in XI 4.0. The plookup action allows you to retrieve a phone number from your device's address book, and then either call or send an SMS to that contact. The elookup action allows you to retrieve an e-mail address from your device's address book, and then send an e-mail to that contact.

To find an address book entry via the embedded lookup action: 1. Select the hyperlinked cell on the document. 2. Launch the device menu, and click the required action. For more information about how to embed actions into the document, refer Designing BI documents for Mobile users guide. Related Topics · Performing follow-up actions 36 2010-11-05 Interacting with Business Intelligence Documents 5.7.2 Sending an SMS Actions are embedded into reports by the document creator at design time. The smsto action enables you to send a text message by SMS to a predefined recipient. To send an SMS via the embedded smsto action: 1.

Select the hyperlinked cell on the document. 2. Launch the device menu, and then click Sms. The SMS message field appears on the device for you to type your message. Related Topics · Performing follow-up actions 5.7.3 Making a call Actions are embedded into reports by the document creator at design time. The phoneto action enables you to phone to a predefined recipient. The phoneto action is typically combined with the lookup action. When this is the case, the Mobile application locates the appropriate phone number in the address book stored on the device.



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To make a call via the embedded phoneto action: 1. Select the hyperlinked cell on the document. 2. Launch the device menu, and then click Call to execute the phoneto action on the number you selected. Related Topics · Performing follow-up actions · Displaying contact details using elookup/plookup 5.

7.4 Sending an e-mail The mailto action enables you to send an e-mail message to a predefined recipient. To send an email via the embedded mailto action: 37 2010-11-05 Interacting with Business Intelligence Documents 1. Select the hyperlinked cell on the document. 2.

Launch the device menu, and then click Send mail. The E-mail message field appears on the device for you to type your message. Related Topics · Performing follow-up actions 5.8 Sending the URL of the BI document by e-mail You use this procedure to send a BI document to a recipient by e-mail. To send the URL of BI document by e-mail, perform the following steps: 1. Open the BI document. 2. If you have local actions embedded in the report, then select the recipient's name or e-mail address in the report. The recipient of the document can either be specified in the document (with local actions), or chosen by the user from their mobile's local phonebook or corporate address book, or can be manually entered by the user. The recipient can be identified either by the name with elookup/plookup local actions, or by an e-mail address with a "mailto" local action in the document.

3. From the menu, select Send report. 4. From the menu, select Send. The subject of the e-mail that has been sent to the recipient contains the BI document name. The recipient can open the BI document on his or her desktop browser by clicking the openDocument URL in the e-mail body. 5.9 Refreshing results and synchronizing documents If you have the appropriate security profile allocated to you by your IT Administrator, you can: · Refresh online documents, when you are logged into the SAP BusinessObjects Enterprise server, to retrieve the latest values from the databases. · Synchronize offline documents, stored locally on your mobile device, with the online versions of the same documents as currently published on the SAP BusinessObjects Enterprise server. When you synchronize an offline document, the new version is saved back to the offline document store on your mobile device.

38 2010-11-05 Interacting with Business Intelligence Documents Related Topics · Synchronizing documents · Refreshing reports with the latest data · Working with documents stored locally on your device 5.9.1 Synchronizing documents You can store copies of documents available on the server on your local device. You can synchronize these local copies, called offline documents, with their online counterparts published on the SAP BusinessObjects server. Synchronizing a document lets you retrieve the latest available document version onto your device.

When you synchronize a document, a message appears requesting you to confirm that you want to save the more recent version from the server onto your device memory and overwrite the previous version. Because the Mobile client only updates the information that has changed since the last synchronization, the duration of the synchronization process depends on network availability and the number of updates to be downloaded from the server to replace the older version on the device. To synchronize an offline document: 1. Navigate to your list of offline documents stored locally on the device. 2.

Without opening the document you want to synchronize, select it and activate the menu. 3. From the menu, select Sync Doc to synchronize the selected document, or Sync All to synchronize all documents in the local storage. A message is displayed warning you that synchronization requires returning to connected mode. 4. Click Yes to switch to connected mode and login to the SAP BusinessObjects server to synchronize the local documents. You can also synchronize a document directly from the document viewing menu. While viewing a document, select Refresh from the menu to synchronize the document with its server version. Related Topics · Working with documents stored locally on your device · Refreshing reports with the latest data 5.9.

2 Refreshing reports with the latest data 39 2010-11-05 Interacting with Business Intelligence Documents To refresh a document, the Refresh a report's data security right must be set to "Granted" in your SAP BusinessObjects Enterprise security profile. Contact your IT or BI administrator for more information.

Note: You can only refresh documents when you are connected to the SAP BusinessObjects Enterprise server. Documents stored locally on your device, which no longer exist on the server, cannot be refreshed. Refreshing a document allows you to query the databases behind the document and retrieve the latest values for its data set. After your refresh action, the reports in the document display the most up-to-date results. To refresh a document: 1. While logged into the SAP BusinessObjects Enterprise server, navigate to the document you want to refresh. 2. Open the document.

3. Launch the device menu, and select Refresh. A message is displayed indicating that the document is being refreshed. If the document contains prompts, you are asked to fill in the prompts before the document is retrieved from the server. Related Topics · Modifying prompts to change report filters 5.

9.3 Using prompts and parameters Using SAP BusinessObjects Mobile, you can leverage the prompts in interactive analysis documents and the parameters in Crystal reports to restrict the values included in the reports you view to those values that interest you. Prompts or parameters are dynamic filters that allow you to specify the data retrieved in a document each time you refresh the document. The document creator usually specifies default values, so that users do not have to select values for each prompt before refreshing and viewing the report. For example, a report creator including a prompt for 'Year' would probably select the current year as the default value.

If you have the appropriate security rights, you can change the values for the prompts when you refresh the document. When you refresh a document that contains prompts, SAP BusinessObjects Mobile displays a prompt screen containing the list of prompts and their current values. By default, the values are the same as those that you selected when you last refreshed the document from your mobile device. To change the values for the prompts you have two options: · revert to the default values specified by the document creator. · enter or select different values from among the available values on the database. 40

2010-11-05 Interacting with Business Intelligence Documents Note: SAP BusinessObjects Mobile does not support cascading prompts in interactive analysis documents or cascading and dynamic parameters in Crystal reports.



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Related Topics · Modifying prompts to change report filters · Refreshing reports with the latest data 5.9.3.1 Modifying prompts to change report filters Prompts and parameters are defined for interactive analysis documents and Crystal reports by the document creator at design time.

To modify the values currently specified for prompts: 1. From within a document, launch the menu and then click Refresh. The list of prompts appears. 2. Select the prompt for which you want to specify a different value. 3. You have the following options: · To reset the prompt value to the default value specified by the report creator, launch the device menu, and select Apply default value. · To reset all the prompt values to the default values specified by the report creator, launch the device menu, and select Set all to default. · If some prompts have no values currently selected, and you want to set those prompts to their default values, launch the device menu and select Set empty to default. · If you want to reset the values of all the prompts, launch the device menu and select Delete all.

This option removes values altogether and leaves the prompts empty. · If you know the exact syntax of the value you want to specify for the prompt, type the value into the prompt field. · If you prefer to view the available values and then select one, select the value you want from the list. If the List of values not refreshed message appears, press the Enter or OK key on your device to refresh the list of values. When you refresh a list of values, all the values currently available on the database for that selected dimension are retrieved to the list.

4. On the device menu, select OK to return to the main Prompt screen. 5. On the device menu, select Get report. SAP BusinessObjects Mobile retrieves the data for the selected prompt values into the reports.

Related Topics · Refreshing results and synchronizing documents 41 2010-11-05 Interacting with Business Intelligence Documents 5.10 Subscribing to alerts

Subscribing to alerts enables you to be notified on your mobile as soon as a specific modification to a specific document has occurred on the SAP BusinessObjects Enterprise server. For example, a sales report alerter is activated when the sales results for the current quarter fall under the tolerance level as defined by the sales directorate. You receive the alert and can contact members of your team to troubleshoot the problems. Alert settings are available for documents that have been modified on the server or have been configured with conditional alerters by the document creator. If you want to activate alerts on the document that you receive on your device, you configure alerters on the document when you create the document. Document and data alerts can be triggered on both standard and scheduled documents. All document and data alerts can push new document data into local device storage, therefore creating a new local document on the device. You can activate (subscribe) and deactivate (unsubscribe) alerts on your device. Note: · · You can only receive alerts on online documents stored on the SAP BusinessObjects Enterprise server.

You have to connect to the server to receive alerts. If you want to use your phone for other tasks than those offered by the SAP BusinessObjects Mobile application, and still receive alerts related to BI documents, you can run SAP BusinessObjects Mobile in the background. If an alert is sent to your device while the application is running in the background, the alert is displayed in the foreground. Click View doc to view the latest instance of the document, or click Ignore, if you want to view it later. Related Topics · Quick reference to alerts · Subscribing to an alert · Viewing alert properties · Working with documents stored locally on your device · Running SAP BusinessObjects Mobile in the background 5.10.1 Quick reference to alerts You can choose from several different alert types, depending on the type of report modification that you want to be informed about: 42 2010-11-05 Interacting with Business Intelligence Documents This alert type... Document alert is useful when you want to be alerted.

.. For example...

when a specific document is modified. Another person has refreshed the document. Conditional when the current report values activate at The current report values meet at least one least one of the specific alerters in a report. of the conditions defined on an alerter on a data alert report, which triggers the alert.

Scheduled document alert when you want to be notified each time a scheduled execution is run.

A scheduled refresh or publish is executed on the document. Scheduled when the current report values during a The current report values following a conditional scheduled refresh activate a specific alerter schedule refresh meet at least one of the in a report. conditions defined on a report in the alerter. data

alert Related Topics · Subscribing to alerts 5.10.2 Subscribing to an alert You can subscribe to specific alerts yourself using the options in SAP BusinessObjects Mobile via your device. Alternatively, depending on your corporate IT policy, you can request that your IT or business intelligence administrator subscribes you to one or more alerts. Note: To subscribe to an alert, select a server document available on the SAP BusinessObjects Enterprise server. How you subscribe to an alert via your device depends on the alert types available for the selected document: 43 2010-11-05 Interacting with Business Intelligence Documents Alert type Document alert Subscription method Select the document title (without opening the document) and activate the alert.

Conditional data alert Select the document and on the Alert properties pane, activate alerts.

Scheduled document Select the document title, view the schedule properties to select the specific schedule for which you want to receive an alert, then activate alerts. alert Scheduled conditional Select the document and view the schedule properties, select the recurrence on which you want to select an alerter, then activate alerts. data alert Note: For information on how to schedule documents, refer to the SAP BusinessObjects Enterprise InfoView User's Guide. To subscribe to an alert: 1. Navigate to and select a document with alert capabilities from the list of documents (do not open the document). 2. From the menu, select Doc alert settings. The document name is displayed under " Alert Properties". 3. Select Subscribe to activate the alert subscription.

Select the type of alert to which you want to subscribe from the list of alerts available for the selected document: · Document updated · Conditional all alerters 4. Select Store local copy to save the document associated with this alert on your device local storage. 5. Launch the application menu and select Subscribe.



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If you selected the Store local copy option, a message appears that indicates the alert is activated and the updated document retrieved.

You are now subscribed to the alerts available for the selected document. Related Topics · Subscribing to alerts · Quick reference to alerts 44 2010-11-05 Interacting with Business Intelligence Documents 5.10.3 Viewing alert properties You can view the following properties of an alert: · document name · alert ID · alert type To view the properties of an alert: 1. From the application menu, select Document Alert Properties.

The "Document Alert Properties" screen is displayed. 2. Select the alert for whose properties you want to display. The following properties are displayed: · the document name · the document ID 3. To display information on the type of alert available for the selected document, select Subscribe to activate the alert subscription. The alert type available for the document is indicated: · Document updated · Conditional all alerters Related Topics · Subscribing to alerts · Subscribing to an alert · Quick reference to alerts 5.10.4 Managing Alerts When you receive an alert, you can either view it immediately, or ignore it to view it later. If you ignore an alert, then you can view it later using Alert Management option. Once you view the instance of the document, then the alert is no longer stored on the device.

You can manage the document update and schedule alerts using "Alert Management" option of the Mobile application. To manage an alert, perform the following steps: 1. Log on to SAP BusinessObjects Mobile application on your device. 2. From the application menu, select Alert management. 45 2010-11-05 Interacting with Business Intelligence Documents The "Current Alerts" screen is displayed with the list of alerts which you have ignored when you received them. 3. To view alert information, select the alert, and from the application menu, select View alert. 4. To view the document instance, select the alert, and from the application menu, select Open Document.

5. To clear an alert, select the alert, and from the application menu, select Clear alert. 6. To clear all alerts for the document, from the application menu, select Clear all for doc. 5.

10.5 Managing Alert Subscriptions When you subscribe to document update or document schedule alerts, you receive alerts when the document is updated or scheduled. When you subscribe to alerts, by default, the state of your alert subscription is enabled. If you do not want to receive alerts, then you can disable alert subscription using Manage Subscriptions option. To disable alert subscriptions, perform the following steps: 1.

Log on to SAP BusinessObjects Mobile application on your device. 2. From the application menu, select Alert management. 3. From the application menu, select Manage subscriptions. The "Subscription Management" screen is displayed with the list of documents you have subscribed for alerts. 4. To disable subscriptions, unselect the subscription for the document. 5. From the application menu, select Save.

6. Select OK. 5.11 Working with documents stored locally on your device Working with documents locally allows you to interact with business intelligence documents on the move without connecting to the SAP BusinessObjects Enterprise server. You reduce your communication costs and mitigate the issues you have with your wireless network connection in some locations. When you save a local copy of a document, it is encrypted, compressed, and stored in the local memory of your device. While devices have different storage capacities, as a general rule SAP BusinessObjects recommends that you limit the number of large documents you store locally on your device for offline use. You can open and view local documents in the same way you open and view server documents. If you want to see the latest version of the document on server, you can synchronize your local version with the newer version on the server. 46 2010-11-05 Interacting with Business Intelligence Documents To receive timely information directly on your device, subscribe to alerts that trigger the server to send documents to your device when the alert conditions, such as a document update or data modification, are met.

Note: If you set a local document as your default document and then delete that document from your offline documents folder, SAP BusinessObjects Mobile no longer opens that document by default when you log into the application. Related Topics · Working with local documents · Saving documents locally on your device 5.11.1 Working with local documents You can work in offline mode when you have saved documents locally to your device. You can opt to work online (by connecting to the SAP BusinessObjects Enterprise server) or offline (by working only with documents stored locally on your device) each time you log in to SAP BusinessObjects Mobile.

Work with local documents when you want to spend a considerable time analyzing a document without the cost of remaining connected to the SAP BusinessObjects Enterprise server. Working online is useful when you want to view new documents that have been published to the server or view the latest version of results. To switch between online and offline modes: 1. From the login screen, select, or unselect Work offline. 2.

Launch the application menu and select Login. You are presented with the choice of accessing local or server documents. If you select server documents, a message appears warning you that you have to connect to the server to access server documents: a. Select No to continue working with local documents only.

b. Select Yes to connect to the SAP BusinessObjects Enterprise server to access server documents. You can only access local documents if you have saved them to your device in a previous session. Related Topics · Saving documents locally on your device 5.11.2 Saving documents locally on your device 47 2010-11-05 Interacting with Business Intelligence Documents You can save documents available on the SAP BusinessObjects Enterprise server onto the local document store on your device.

@@To save a server document to your local document store: 1. Navigate to the document you want to save. 2. Select it from the list of available documents.

3. From the menu, select Save doc. @@4. @@· Yes to proceed and save the document locally. @@Note: If you set a local document as your default document and then delete that document from your "Local documents" folder, SAP BusinessObjects Mobile no longer opens that document by default when you log into the application. To delete a local document: 1.

Navigate to the list of local documents stored on your device. 2. Select, but do not open the document you want to delete from local storage. 3. Launch the menu and select Delete.

A warning appears, warning that the local document will be deleted.



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