1. Creating Master Data Directly in the System
2. Load the data. Creating Master Data Directly in the System
3. Loading Master Data for Characteristic "Product"
4. Loading Transaction Data
5. Dene a query that is used as the basis for a Web application and allows for an ad-hoc analysis of the data in the Web.
6. You create the query in the following step:
7. Dening Queries
8. Create a Web application with navigation options and functions, such as printing based on the query.
9. You create the Web application in the following step:
10. Creating Web Applications
11. Analyze the data in the Web application, add comments to it, and broadcast it by E-mail to other employees.
12. You analyze and broadcast the data in the following steps:
13. Analyzing Data in the Web Application
14. Broadcasting Web Applications by E-Mail
15. Log onto the BI system
16. Log onto the BI system with a user that has sufficient authorizations for executing the scenario.
17. Start the Data Warehousing Workbench in the SAP menu by choosing Modeling Data Warehousing Workbench: Modeling.
18. Under Modeling, choose Info Objects. The Info Object tree is displayed.
19. From the context menu at the root node Info Objects of the Info Object tree, choose Create Info Area.
20. On the next screen, enter a technical name and a description for the Info Area. The Info Area is displayed in the Info Object tree.
21. It is used to group your Info Objects.
22. In the context menu of the Info Area, choose Create Info Object Catalog.
23. On the next screen, enter a technical name and description, and select Key Figure as the Info Object Type.
24. Choose Create9. Activate the Info Object catalog.
25. The Info Object catalog is displayed in your Info Area.
26. It is used to group your key gures.
27. Perform the following procedures to create each of the key gures Revenue ,Quantity and Price
28. Creating Data sources for Master Data of Characteristic "Product"

1. You are in the Modeling functional area of the Data Warehousing Workbench

2. Choose Info Provider. The Info Provider tree is displayed. The Info Area created previously in the Info Object tree is also displayed in the Info Provider tree. It contains the characteristics that were dened as Info Provider and is used to group further objects.

3. In the context menu of the Info Area, choose Create Info Cube.

4. In the next screen, enter ZD\_SALES as the technical name under Info Cube and Sales Overview as the description.

5. Select Standard Info Cube as Info Provider Type and choose Create. You go to the screen for Info Cube editing.

6. Choose Create New Dimensions in the context menu of the folder Dimensions. 7. Enter Product as the description for the new dimension and choose Create Another Dimension.

8. Enter Sales Organization as the description for the new dimension and choose Continue. The dimensions are inserted.

9. In the toolbar in the left area, choose Info Object Catalog.

10. On the next screen, select your Info Object catalog for characteristics as the template and choose Continue. The Info Object catalog is displayed in the left area with the characteristics you created.

11. Assign the characteristics to the dimensions as follows with drag and drop:

12. Choose Info Object Direct Input in the context menu of the dimension Sales Organization.

13. On the next screen, enter the characteristic 0DOC\_NUMBER ( Sales Document ) and choose Continue. The characteristic Sales Document is a shipped Info Object of BI Content.

14. Expand the folder Navigation Attributes. Activate the navigation attribute Product Group (ZD\_PROD\_\_ZDPGROUP) by setting the indicator in column On/Off。

1. Creating Transformations

0 Creating Transformations for Master Data of Characteristic "Product"

1. You are in the Modeling functional area of the Data Warehousing Workbench.

2. Choose Data sources.

3. From the toolbar in the right screen area, choose Choose Source System.

4. In the menu option File, select the source system with the technical name PC\_FILE. A hierarchical tree of the Data sources for this source system is displayed. The Data sources are structured semantically by application component. 5. Select Create application component... from the context menu at the root node of the Data source tree.

6. On the next screen, enter a technical name and a description for the application component. The application component is used to group your Data sources for this scenario.

7. In the context menu of your application component, choose Create Data source. 8. Enter the required data on the next screen.

9. Choose Transfer. The Data source maintenance screen appears. 10. Enter the required data on the tab page General Info .

1. Creating Master Data Directly in the System

1. In the Modeling area of the Data Warehousing Workbench, choose Info Objects. 2. In the Info Object catalog for characteristics, choose Maintain master data from the context menu of your Info Object Product Group (ZD\_PGROUP).

3. Choose Execute.

4. Choose Create.

5. Enter DS10 as Product Group and Computer as the Short description and choose Continue.

6. Repeat steps 4 and 5 with the following values:

7. Save your entries and return to the Info Object tree.

8. Repeat steps 2-7 for the characteristic Channel (ZD\_CHAN) with the following values:

1. Loading Master Data forCharacteristic "Product"

Go to the Data Warehousing Workbench;

in the Modeling area choose Info Provider. The attributes and texts are displayed with transformation and Data source in your Info Area below the characteristic Product.

3. Perform the following steps, rst for the attributes of the characteristic and then for the texts of the characteristic.

4. From the context menu of the Data source, choose Create Info Package...

5. On the next screen, enter a description for the Info Package and choose Save. The Info Package maintenance screen for the scheduler appears.

6. Go to the tab page Schedule and choose Start.

7. To check the load process, choose Monitor in the toolbar of the Info Package maintenance screen.

8 On the next screen, select the date and choose Execute. The monitor for the load process is displayed.

9 Select the load process for your Data source from the tree at the left of the screen.

1. Loading Transaction Data

1. Go to the Data Warehousing Workbench; in the Modeling area choose Info Provider. The transformation and the Data source are displayed in the Info Area below the Info Cube Sales Overview.

2. In the context menu of the Data source, choose Create Info Package...

3. On the next screen, enter a description for the Info Package and choose Save. The Info Package maintenance screen for the scheduler appears.

4. Go to the tab page Schedule and choose Start.

5. To check the load process, choose Monitor in the toolbar of Info Package maintenance.

6. On the next screen, select the date and choose Execute. The monitor for the load process is displayed.

7. Select the load process for your Data source from the tree at the left of the screen.

8. Exit the Info Package maintenance screen.

9. From the context menu of the Data source, choose Create Data Transfer Process.... The system displays a generated description, the type, source and target of the data transfer process.

10. Choose Continue.

11. The data transfer process maintenance screen appears.

12. Go to tab page Extraction and select extraction mode Full.

13. Activate the data transfer process.

14. Go to tab page Execute and choose Execute.

1. Dening Queries

1. Start the BEx Query Designer by choosing Start Programs Business Explorer Query Designer.

2. Log on to the BI system.

3. In the toolbar, choose New Query...

4. Choose Find.

5. Enter ZD\_SALES as the search string in the upper empty eld, select Search in Technical Name and deselect Search in Description.

6. Choose Find. Info Cube ZD\_SALES is displayed in the lower empty eld

7. Select the Info Cube ZD\_SALES and choose Open. The data of Info Cube Sales Overview (ZD\_SALES) is displayed in the left part of the Info Provider screen of the Query Designer.

1. Creating Web Applications

1. Start the BEx Web application by choosing Start Programs Business Explorer Web Application Designer.

2. Log onto the BI system.

3. In the initial screen of the Web Application Designer, click on the link Create New Blank Web Template.

4. In the lower part of the layout view choose New Data Provider.

5. In the dialog box for the data provider type select Query and enter the name of the query ZD\_SALES\_2007 in the eld following Query.

6. Choose OK.

7. The data provider is displayed in the lower part of the layout view in the Web Application Designer

1. Analyzing Data in the Web Application

1. Since you are interested in the revenue, you want to sort the revenue data.

2. Click on the arrows in the Revenue eld to sort the revenue data in increasing or decreasing order.

3. You can also sort the revenue by clicking the alternative mouse button on Revenue and choosing Sort Sort Increasing or Sort Decreasing in the context menu. You see that the greatest revenue is obtained with the distribution channel Internet.

4. To see the differences in the revenue data for the months July, August and September, select rst 08.2007 and then 07.2007 in the dropdown box Calendar Year/Month. You see that the revenue data for the distribution channel Internet increased greatly. The marketing campaign for the Internet shop was apparently successful.

5. Filter the data back to September by selecting 09.2007 in the dropdown box.

6. To add a comment to the Web application about the successful increase in revenue using the Internet, create an appropriate document. At the subtotal of the distribution channel Internet (567.308,05) choose Documents Create New Comment in the context menu.

7. Enter a name and description for the document.

8. Enter a text and choose Save

1. Broadcasting Web Applications by E-Mail

1. In the Web application, click on Send. The Broadcasting Wizard appears; it guides you step-by-step through the required settings.

2. Select output format MHTML. The system creates an MHTML le. All components (HTML, style sheet, pictures, and so on) of the entire HTML page are in one le. This output format is suitable if you want to generate one single document and broadcast it by e-mail or to the portal.

3. Choose Continue.

4. Enter the e-mail addresses of the recipients, separated with semicolons.

5. Enter a subject line and text, and dene the importance of the e-mail

6. Choose Execute.

1. Set granular application rights to various functions within LifeCycle

Manager.

1. Log into CMC and select Applications.

2. Double-click LifeCycle Manager.

3. Click User Security, and select Administrators.The View Security tab is enabled.

4. Select the rights you want to set.You can set the following rights:

• Create a job

• Edit a job

• Promote a job

• Export a BIAR file

• Edit a BIAR file

• Delete a job

• Rollback a job

• Use Administration options

• Edit Connections properties

• Use Version Management System

5. Click OK.

1. promote a job when the source and the destination systems are connected, complete the following steps:

1. Connect to the source system.

2. Create a new job. You can also copy an existing job.

3. Add infoobjects to the job you want to promote. If you do not want to promote all the dependents of the infoobjects, you can use the Manage Dependencies option to select the dependents you want to promote.

Note:

You can select the type of dependents you want to promote from the Type drop-down list.

4. Promote the job.

Promoting a job when the source system and the destination system are not connected

18 To promote a job when the source and the destination systems are not connected, complete the following steps:

1. Connect to the source system, and create a job. You can also copy an existing job.

2. Add infoobjects to the job you want to promote. You can use the Manage Dependencies option to select the required dependents.

Note:

You can select the type of dependents you want to promote from the

Type drop-down list.

3. Export infoobjects with Output to BIAR file as the destination system.

4. Import infoobjects from the BIAR file by clicking the Import BIAR tab.

5. Promote the job.

1. log into the LifeCycle Manager tool.

To log into the LifeCycle Manager tool, complete the following steps:

1. Select Start > Programs > BusinessObjects XI 3.1 > BusinessObjects Enterprise > BusinessObjects LifeCycle Manager. The LifeCycle Manager login screen appears.

2. In the System field, enter the name of the Central Management Server (CMS) on which the LifeCycle Manager tool is installed.

3. Enter the user name and password.

4. Select the appropriate authentication method from the Authentication drop-down list.

The LifeCycle Manager tool supports the following authentication types:

• Enterprise authentication - This authentication type requires a user name and a password that are recognized by the BusinessObjects Enterprise system. This is the default authentication method.

• LDAP authentication - This authentication type requires a user name and a password that are recognized by the BusinessObjects Enterprise system.

• Windows AD - This authentication type requires a user name and a password that are recognized by the BusinessObjects Enterprise system.

The LDAP, Windows AD, and other third-party authentication types require a special setup. For information on setting up these authentication types, see the BusinessObjects Enterprise Administrator's Guide.

5. Click Log on.

1. use the Manage Systems option

To add a host system, complete the following steps:

1. In the "Administration Options" window, click Manage Systems.

The list of host names, port numbers, display names, and descriptions is

displayed.

2. Click Add.

The "Add System" dialog box appears.

3. Add the host name, port number, display name, and the description in

the appropriate fields.

4. Click Add to add the system.

The host system is added to the list.

1. Set the ClearCase version management system in Windows

1. In the "Administration Options" window, click VMS Settings.

2. From the Version Management Systems drop-down list, select

ClearCase.

3. Enter the following details:

• ClearCase Map Drive - Enter the drive name. By default, it is the M

drive. For example: M:

• VOB Tag Name - Enter the Versioned Object Base (VOB) name. For

example: FridayVB

• View Storage Directory - Enter the path to the shared folder. For

example: \\HostName\FolderName

Note:

The host name must not be written as localhost.

1. Click Save.
2. set the ClearCase version management system in Unix

1. In the Administration Options window, click VMS Settings.

2. From the Version Management Systems drop-down list, select ClearCase.

3. Enter the following details:

• ClearCase Map Drive - Enter the name of the folder where the MVFS

is located. By default, it is /view

• VOB Tag Name - Enter the VOB name and the folder where the VOB

is located. For example: VobFolder/VobName

• View Storage Directory: Enter the path of the directory where the views

are created.

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1. specify the number of jobs that must be displayed in the "Promotion

Jobs" screen. You can also view jobs that were created during a particular

time interval.

To set preferences, complete the following steps:

1. In the "Promotion Jobs" screen, click the Preferences link.

The "Preferences" window appears.

2. In the "Enter the Maximum Page Size" dialog box, specify the number of

objects that must be displayed per page in the "Promotion Jobs" screen.

3. From the Show Jobs Created drop-down list, select the time interval to

view the jobs created during the specified period.

4. Click OK.

1. create a new job by using the LifeCycle Manager tool

1. Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, click New Job. The "New Job"

window appears .

3. Enter the name, description, and keywords for the job in the appropriate

fields.

4. In the Save Job in field, browse and select the folder in which you want

to save the job.

5. Select the source system and the destination system from the drop-down

lists.

If the name of the system is not displayed in the drop-down list, click the

Login to a new CMS option. A new window is launched. Enter the name

of the system along with the user name and password.

6. Click Create.

1. log into a new CMS

1. Log into the LifeCycle Manager tool.

2. Create a new job.

For more information on creating a new job, see Creating a New Job on

page 37.

3. From the Source System drop-down list, select Login to a New CMS.

The "Login to System" dialog box appears.

4. Enter the user credentials, select the appropriate authentication type, and

click Login.

5. From the Destination System drop-down list, select Login to a New

CMS.

6. Enter the user credentials, select the appropriate authentication type, and

click Login.

1. create a new job by copying an existing job.

To create a new job by copying an existing job, complete the following steps:

1. Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, click New Job.

3. Click the Copy an Existing Job option. The list of jobs in the Promotion

Job folder is displayed

4. Select a job from the job list, and click Create. The name, keywords, and description of the job are displayed. You can modify these fields, if required. However, you cannot change the source system.

5. In the Save Job in field, browse and select the folder in which you want to save the job, and click Create.A new job is created.

1. manage dependencies of an infoobject

1. Log into the LifeCycle Manager tool.

2. Create a new job. For information on creating a new job, see Creating a

New Job on page 37.

3. Add the required infoobjects to the new job.

4. In the "Promotion Jobs" home page, click Manage Dependencies. The "Manage Dependencies" window appears. This window displays the list of infoobjects and their dependents, as shown in the following figure:

5. From the Select Dependents drop-down list, select any of the options available to add the dependents to the job. The dependents are displayed on the right side. The dependents are not selected by default; you must explicitly select the dependents you want to promote. For example, if you select All Universes from the Select Dependents drop-down list, then all the universes included in the list of dependents

are automatically selected.

6. Click to view the supported filtering options of infoobjects in the drop-down list. Select an option, and click OK. The filtered infoobjects are displayed.

7. Click Apply Changes to update the list of dependents.

8. Click Apply Changes and Close to save the changes

1. promote a job

Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, select the job that you want to promote. You can also right-click the home page screen, and click Promote.

3. From the source and the destination systems drop-down lists, select the source and destination systems.

Note:

Ensure that you have logged into both the source and destination systems before you proceed with the promotion process.

4. In the External Change Management ID field, enter the appropriate value, and click Save.

5. Click Mappings. Click Edit Mappings if you want to create and validate mappings.

6. Click Security Settings, if required. The following options are displayed:

• Do not Promote Security - This is the default option.

• Promote Security - Use this option to promote jobs along with the

associated security rights.

• Include application rights - This option is enabled only if you select Promote Security. If the objects in the job inherit any application rights, the job is promoted along with these rights. You can also click View Security to view the security dependencies of the infoobjects in the job.

7. Click Test Promote to ensure that there is no conflict between CUIDs in the source and destination systems. The promotion details are displayed. The first column displays the objects to be promoted, and the second column displays the promotion status. The LifeCycle Manager tool classifies the selected objects into users, groups, universes, and so on.

Note:

Running the Test Promote feature does not commit any infoobjects for promotion. The result of a test promote can be any of the following:

• Overwritten - The infoobject in the destination is overwritten by the infoobject in the source system.

• Mapped - The following infoobject types are mapped to the destination system: folders, users, user groups, and custom roles. An infoobject is mapped to the destination system and promoted only if the Security option is enabled. Otherwise, the infoobject is not promoted.

• Copied - The infoobject in the source system is copied to the destination system.

• Dropped - The infoobject is not promoted from the source system to the destination system.

• Warning - The infoobject in the destination system is the newer version and you can remove the infoobject from the Job. However, if you want to promote, the infoobject gets promoted.

8. Click Schedule Job if you want to schedule the job promotion.

9. Click Promote.

1. Mapping a connection.

To map a connection, complete the following steps:

1. In the "Promote" window, click Mappings.

2. Click Edit Mappings.

The following tabs are displayed:

• Connection Mappings

• QaaWS Mappings

• Crystal Report Mappings

• Federation Mappings

3. Click the Connection Mappings tab. The source connections and the database types are displayed. If you want to edit the properties of a source connection, select the source connection, and click Edit Connection Properties. The "Edit Connection Properties" tab appears. This tab displays the list of properties and their values. Modify the values per your requirements, and click Apply. The "Connection Mappings" tab appears.

4. From the Destination Connection drop-down list, select a destination connection for the selected source connection.

5. Click Apply.

1. map a QaaWS

1. In the "Promote" window, click Mappings.

2. Click Edit Mappings.

The following tabs are displayed:

• Connection Mappings

• QaaWS Mappings

• Crystal Report Mappings

• Federation Mappings

3. Click QaaWS Mappings.

The source URL and the Query as a Web Service types are displayed. If you want to edit the properties of the source URL, select the source URL, and click Edit QaaWs Properties. The Edit QaaWS Properties

tab appears. This tab displays the list of properties and their values. Modify the values per your requirements, and click Apply. The QaaWS Mappings tab appears.

Note:

If you edit the source URL, the destination field displays the following message: Edited Source URL

4. From the Destination URL drop-down list, select a destination URL for the selected source URL.

If you want to reset the modifications made to the destination URL, click the icon.

5. Click Apply.

1. modify the properties of a Crystal report

1. In the "Promote" window, click Mappings.

2. Click Crystal Report Mappings.

The list of Crystal reports in the source system is displayed.

3. Select the required Crystal report, and click Edit Crystal Report Properties. The "Edit Crystal Report Properties" tab appears, as shown in the following figure: This tab displays the list of properties and their values.

4. Modify the appropriate fields, and click Apply. The Crystal Report Mappings tab appears.

Note:

• If you edit a Crystal report in the source system, the following message is displayed beside the Crystal report: edited

• A Crystal Report created using Universes cannot be mapped in the Crystal Report Mappings. However, it can be mapped in the Connections Mappings.

• Crystal Reports are grouped based on the same servers. You can either map a single Crystal Report or the group,. However, you cannot map multiple Crystal reports at the same time.

5. Click Save or Promote per your requirements。

1. map a Federation connection

1. In the "Promote" window, click Mappings.

2. Click Federation Mappings.

The list of Federation connections is displayed.

3. Select a Federation connection, and click Edit Federation Connection Properties. The "Edit Federation Connection Properties" tab appears. This tab displays the list of properties and their values.

4. Modify the appropriate fields, and click Apply. The "Federation Mappings" tab appears.

Note:

If you edit a Federation connection in the source system, the following

message is displayed beside the federation connection: edited

5. Click Save or Promote as per your requirement. Important: Mapping must be performed by an expert user who has adequate knowledge of the artefacts in both source and destination systems.

1. Exporting a Job to a BIAR File

1. Log into the LifeCycle Manager tool, and create a new job. For more information on creating a new job, see Creating a New Job on page 37

2. In the Destination System drop-down list, select Output to a BIAR file option and click Create.

3. Click Add objects to add infoobjects to the job. You can use the Manage Dependencies option to manage the dependencies of the selected job.

4. Click Promote.

The "Promote - Job Name" screen appears.

5. Click Export.

The BIAR file is created. You can save a BIAR file to a File System or an FTP location.

6. In the "Promote - Job Name"screen, click Biar File Destination. Biar File Destination pane appears.

7. Select either File System or FTP.

8. To export the BIAR file to a file system, select File System and click Export. The BIAR file is exported to a file system.

9. To export the BIAR file to an FTP location, select FTP. Enter appropriate details in the host, port, username, password, directory, and filename fields.

10. Click Export.

The BIAR file is exported to an FTP location.

1. Importing a Job from a BIAR File

1. From the storage device, copy the BIAR file to the destination system.

2. Log into the LifeCycle Manager tool.

3. In the "Promotion Jobs" home page, click Import BIAR. The "Import BIAR file" window appears.

4. Click Browse to select a BIAR file from the file system.

5. Select the BIAR file from the file system, and click Copy. The details of the selected file appear in the "New Job" screen.

6. Click Create.

The job is created. You can also manage the dependencies of the job in the "Managing Dependencies" window.

7. Click Promote.

The "Promote - Job Name" window appears.

8. Confirm the login credentials of the destination system.

9. Click Promote to promote the contents to the destination system You can also click the Test Promote option to view the objects to be promoted and the promotion status.

1. Creating a New Job

1. Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, click New Job. The "New Job"window appears .

3. Enter the name, description, and keywords for the job in the appropriate fields.

4. In the Save Job in field, browse and select the folder in which you want to save the job.

5. Select the source system and the destination system from the drop-down lists. If the name of the system is not displayed in the drop-down list, click the Login to a new CMS option. A new window is launched. Enter the name of the system along with the user name and password.

6. Click Create.

1. Logging into a New CMS

1. Log into the LifeCycle Manager tool.

2. Create a new job.

For more information on creating a new job, see Creating a New Job on page 37.

3. From the Source System drop-down list, select Login to a New CMS. The "Login to System" dialog box appears.

4. Enter the user credentials, select the appropriate authentication type, and click Login.

5. From the Destination System drop-down list, select Login to a New CMS.

6. Enter the user credentials, select the appropriate authentication type, and click Login.

1. Creating a New Job by Copying an Existing Job

1. Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, click New Job.

3. Click the Copy an Existing Job option. The list of jobs in the Promotion Job folder is displayed.

4. Select a job from the job list, and click Create. The name, keywords, and description of the job are displayed. You can modify these fields, if required. However, you cannot change the source system.

5. In the Save Job in field, browse and select the folder in which you want to save the job, and click Create. A new job is created.

1. BusinessObjects LifeCycle Manager User's Guide

1. Log into the LifeCycle Manager tool.

2. Create a new job. For information on creating a new job, see Creating a

New Job on page 37.

3. Add the required infoobjects to the new job.

4. In the "Promotion Jobs" home page, click Manage Dependencies.The "Manage Dependencies" window appears. This window displays the list of infoobjects and their dependents, as shown in the following figure:

5. From the Select Dependents drop-down list, select any of the options available to add the dependents to the job. The dependents are displayed on the right side. The dependents are not selected by default; you must explicitly select the dependents you want to promote. For example, if you select All Universes from the Select Dependents drop-down list, then all the universes included in the list of dependents are automatically selected.

6. Click to view the supported filtering options of infoobjects in the drop-down list. Select an option, and click OK. The filtered infoobjects are displayed.

7. Click Apply Changes to update the list of dependents.

8. Click Apply Changes and Close to save the changes.

1. BusinessObjects LifeCycle Manager User's Guide

1. Log into the LifeCycle Manager tool.

2. In the "Promotion Jobs" home page, select the job that you want to promote. You can also right-click the home page screen, and click Promote.

3. From the source and the destination systems drop-down lists, select the source and destination systems.

Note:

Ensure that you have logged into both the source and destination systems before you proceed with the promotion process.

4. In the External Change Management ID field, enter the appropriate value, and click Save.

5. Click Mappings. Click Edit Mappings if you want to create and validate mappings.

6. Click Security Settings, if required. The following options are displayed:

• Do not Promote Security - This is the default option.

• Promote Security - Use this option to promote jobs along with the associated security rights.

• Include application rights - This option is enabled only if you select Promote Security. If the objects in the job inherit any application rights, the job is promoted along with these rights. You can also click View Security to view the security dependencies of the infoobjects in the job.

7. Click Test Promote to ensure that there is no conflict between CUIDs in the source and destination systems. The promotion details are displayed. The first column displays the objects to be promoted, and the second column displays the promotion status. The LifeCycle Manager tool classifies the selected objects into users, groups, universes, and so on.

8. Click Schedule Job if you want to schedule the job promotion.

9. Click Promote.

1. Mapping a connection

1. In the "Promote" window, click Mappings.

2. Click Edit Mappings.

The following tabs are displayed:

• Connection Mappings

• QaaWS Mappings

• Crystal Report Mappings

• Federation Mappings

3. Click the Connection Mappings tab.

The source connections and the database types are displayed. If you want to edit the properties of a source connection, select the source connection, and click Edit Connection Properties. The "Edit Connection Properties" tab appears. This tab displays the list of properties and their values. Modify the values per your requirements, and click Apply. The "Connection Mappings" tab appears.

Note:

If you edit the source connection, the destination field displays the following message: Edited Source Connection

4. From the Destination Connection drop-down list, select a destination connection for the selected source connection.

5. Click Apply.

1. Exporting a Job to a BIAR File

1. Log into the LifeCycle Manager tool, and create a new job. For more information on creating a new job, see Creating a New Job on page 37

2. In the Destination System drop-down list, select Output to a BIAR file option and click Create.

3. Click Add objects to add infoobjects to the job. You can use the Manage Dependencies option to manage the dependencies of the selected job.

4. Click Promote. The "Promote - Job Name" screen appears.

5. Click Export. The BIAR file is created. You can save a BIAR file to a File System or an FTP location.

6. In the "Promote - Job Name"screen, click Biar File Destination. Biar File Destination pane appears.

7. Select either File System or FTP.

8. To export the BIAR file to a file system, select File System and click Export. The BIAR file is exported to a file system.

9. To export the BIAR file to an FTP location, select FTP. Enter appropriate details in the host, port, username, password, directory, and filename fields.

10. Click Export.

The BIAR file is exported to an FTP location.

1. Importing a Job from a BIAR File

1. From the storage device, copy the BIAR file to the destination system.

2. Log into the LifeCycle Manager tool.

3. In the "Promotion Jobs" home page, click Import BIAR. The "Import BIAR file" window appears。

4. Click Browse to select a BIAR file from the file system.

5. Select the BIAR file from the file system, and click Copy. The details of the selected file appear in the "New Job" screen.

6. Click Create.

The job is created. You can also manage the dependencies of the job in the "Managing Dependencies" window.

7. Click Promote. The "Promote - Job Name" window appears.

8. Confirm the login credentials of the destination system.

9. Click Promote to promote the contents to the destination system. You can also click the Test Promote option to view the objects to be promoted and the promotion status.

1. create and manage different versions of an infoobject

1. Log into the LifeCycle Manager tool.

2. In the LifeCycle Manager home page, select Version Management from the drop-down list. The "Login to System" dialog box appears.

3. Enter the login credentials, and click Login. The "Version Management" window appears.

4. If you want to change the host system, click . The "Login to System" dialog box appears.

5. Enter the user credentials, and click Login.

6. From the left panel of the "Version Management" window, select the folder to view the infoobjects whose versions you want to manage.

7. Select the infoobjects and click Add to VM.

8. Click Checkin to update the document that exists in the VMS repository. The "Check-in Comments" dialog box appears.

9. Enter your comments, and click OK. The change in the version number of the selected infoobject is displayed in the VMS and Content Management System columns.

10. To obtain the latest version of the document from the VMS, select the required infoobject, and click Get latest Version.

11. To create a copy of the latest version, click Create Copy. A copy of the selected version is created.

12. Select History to view all the versions available for the selected resource. The "History" window appears. The following options are displayed:

• Get Version - If there are multiple versions, and if you require a particular version of the BI resource, then you can select the required resource and click Get Version.

• Get Copy of Version - This option enables you to obtain a copy of the selected version.

• Export Copy of Version - This option enables you to obtain a copy of the selected version and save it to your local system.

13. Select an infoobject and click Lock to lock the infoobject and click Unlock to unlock the infoobject.

14. CMS and VMS Synchronisation - When the CMS version of the infoobject is updated, an indicator appears beside the updated infoobject. When you place the cursor on the indicator, you get a tool tip describing that the infoobject in the CMS is updated.

15. To view the list of all checked in resources that exist in the VMS, but not in the CMS, click View Deleted resources. Click any deleted resource to view the history of that resource. You can select a deleted resource, and click Get Version to view that particular version of the resource. You can click Get Copy of Version to get a copy of the selected resource.

16.Select a resource, and click to view the properties of the resource.

1. Setting preferences for check integrity
2. From the information design tool main menu, select Window Preferences.
3. In the Preferences dialog box, expand the Information Design Tool node and select Check Integrity.
4. To select rules to be run automatically when you save a resource: Select the Enable background check integrity on save option.
5. Select the rules to include in the background check.
6. The Cost column indicates the relative processing time required to execute the rule.
7. To change the severity of the messages returned by a rule, click in the Severity column for the rule. Select a severity from the list.
8. To restore the default values for check integrity preferences, click Restore Defaults.
9. To save the changes and continue editing preferences, click Apply.
10. To save the changes and close the Preferences dialog box, click OK.
11. Setting preferences for the Data Foundation Editor
12. From the information design tool main menu, select Window Preferences.
13. In the Preferences dialog box, expand the Information Design Tool node and select Data Foundation Editor.
14. The Data Foundation Editor page allows you to select options for how connections are displayed in the data foundation.
15. To change other display options, expand the Data Foundation Editor node and select one of the following pages:
16. To restore the default values for preferences on the current page, click Restore Defaults.
17. To save the changes and continue editing preferences, click Apply.
18. To save the changes and close the Preferences dialog box, click OK.
19. Setting languages used by the information design tool
20. From the information design tool main menu, select Window
21. select Preferences.
22. In the Preferences dialog box, expand the Information Design Tool node and select Languages.
23. To change the language of the user interface, select the language from the Product Languages list.
24. To change the Preferred Viewing Locale, select the language from the list.
25. For information about the Preferred Viewing Locale and how it impacts the language display, see the related topic about multilingual universes.
26. To save the changes and continue editing preferences, click Apply.
27. To save the changes and close the Preferences dialog box, click OK.
28. Setting middleware for secured relational connections
29. From the information design tool main menu, select Window
30. select Preferences.
31. In the Preferences dialog box, expand the Information Design Tool node and select Secured Connections.
32. Select the middleware to use:
33. To restore the default value, click Restore Defaults.
34. To save the changes and continue editing preferences, click Apply.
35. To save the changes and close the Preferences dialog box, click OK.
36. Translating universe metadata
37. In the information design tool, create a local project if you do not already have one.

When creating the project, note the file path to the directory where the project files are saved in the file system. The default root directory for all projects is workspace.

1. Retrieve the universe into the local project.

The information design tool saves the .dfx and .blx files in the local project. These files correspond to the data foundation and business layer definitions. These are the files that are used as the source for the translations.

1. In the translation management tool, translate the data foundation metadata (for relational universes)
2. Import the .dfx file from project folder in the local file system.
3. Translate the metadata.
4. Export the translated content to the local file system.
5. For details on these workflows, see the Translation Management Tool User Guide.
6. Follow the same procedure as in previous step to translate the .blx file.
7. In the information design tool, to see the translations:
8. In the application language preferences, select translated language as the Preferred Viewing Language. Exit and restart the information design tool for the language change to take effect.
9. Open the business layer by double-clicking it in the Local Projects View. You can see the translated metadata in the Query Panel. To open the Query Panel, select the Queries pane and click Insert Query.
10. Re-publish the business layer so that translations are available to universe users.

For universes published to a repository, you can open the Query Panel on the published universe by right-clicking the universe the Repository Resources View and selecting Run Query.

1. creating a prompted parameter and list of values in the data foundation:
2. Open the data foundation by double-clicking the data foundation name in the Local Projects View
3. Click the Parameters and Lists of Values tab.
4. In the data foundation Lists of Values pane, define a list of values based on custom SQL for Language. For example: SELECT "LANGUAGES"."LANGUAGEID", "LANGUAGES"."LANGUAGECODE" FROM "LANGUAGES"
5. In the data foundation Parameters pane, define a parameter for Language. Select the option Prompt to users and associate the Language list of values to it.
6. In the data foundation, edit the column filter in the dimProductStrings table. Change the join expression to reference the new prompted parameter, for example:dimProductStrings. LanguageID = @Prompt(Language)
7. Save and close the data foundation.
8. The second solution consists of using a mandatory filter in the business layer:
9. Open the data foundation in the editor and delete the column filter on the dimProductStrings table that contains the @Prompt.
10. Save and close the data foundation.
11. Open the business layer in the editor.
12. In the business layer Lists of values pane, define a list of values based on custom SQL for Language. For example:SELECT "LANGUAGES"."LANGUAGEID", "LANGUAGES"."LANGUAGECODE" FROM "LANGUAGES"
13. In the business layer Parameters pane, define a parameter for Language. Keep the default option to Prompt to users and associate the Language list of values to it.
14. In the business layer, in the folder associated with Product, create a filter with an expression that refers to the Language prompted parameter, for example:dimProductStrings.LanguageID = @Prompt(Language)
15. In the Properties tab of the filter definition, select the Use filter as mandatory in the query option. Select the Filter scope of Apply on Folder.
16. Save and close the business layer.
17. Converting a .unv universe in a repository

If you want to retrieve the converted .unx universe into a local project in order to work on it, you must first have a local project folder in the Local Projects View.

1. In the information design tool, select File
2. Select Convert .unv Universe.
3. In the Convert a .unv Universe dialog box, click the Select .unv universe from a repository icon .
4. Open a session on the repository where the .unv universe is saved, select the universe, and click OK.
5. Click the Browse button next to the Destination Repository Folder field, and then select a folder in the repository where you want to save the converted .unx universe.
6. If you want to retrieve the converted .unx universe into a local project in order to work on it, click the Browse button next to the Destination Local Project Folder field, select a project folder, and click OK
7. If you want the conversion to create named parameters for prompts, select the Automatically convert @Prompt expressions into universe named parameters option. For more information about named parameters, see the related topic.
8. If you are retrieving the converted universe into a local project and want remove the local security requirement so that any user can open the universe resources without entering repository authentication, select the Save for all users option.
9. Click OK to start the conversion.
10. After conversion, it is recommended to refresh the structure of the data foundation, then run a check integrity on the universe to detect problems in the conversion. For tips on resolving check integrity errors, see the related topic.
11. Converting a locally-stored .unv universe
12. In the information design tool, select File
13. Select Convert .unv Universe.
14. In the Convert a .unv Universe dialog box, click the Select .unv universe from the local file system icon , and select the universe you want to convert.
15. Click the Browse button next to the Destination Local Project Folder field, select a project folder, and click OK.
16. If you want the conversion to create named parameters for prompts, select the Automatically convert @Prompt expressions into universe named parameters option. For more information about named parameters, see the related topic.
17. Click OK to start the conversion.

The conversion creates the equivalent universe resources (data foundation, business layer, and local connection) in the specified local project folder.

At this point, it is recommended to refresh the structure of the data foundation.

You can now publish the business layer to create the .unx universe file. This creates a local universe. To publish the universe to the repository, continue with the next step.

1. Publish the local connection to a repository.
2. Edit the data foundation and change the connection to use the secured connection published in the last step.
3. Publish the business layer to the repository.
4. Working in a shared project

Use this procedure to work on resources in an existing shared project.

1. Open the Project Synchronization View with a session on the repository system where the shared project is saved.
2. Select the shared project from the Shared Project list.
3. In the selected shared project, lock the resources you want to work on.Locks are available as a communication tool between designers. When other designers open the Project Synchronization View, your lock informs them that you are making changes. It also prevents other designers from updating these resources in the shared project while you have them locked. However, any designer can unlock the resource if necessary.
4. Synchronize the project to update the resources in the local project with the latest changes saved on the server.

If you do not already have a local version of the project, one is created in the Local Projects View.

You may want to review the changes made on the server before updating them in the local project. For more information, see the related topic on merging changes in shared resources.

1. Once you have made your changes, in the Project Synchronization View, synchronize the project to save your changes on the server.
2. Unlock the resources.

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1. Customizing with add-ons
2. Click File > Manage Add-Ons....
   1. The "Add-On Manager" dialog box opens.
3. Click Get More Add-Ons and, in the security dialog box, click OK.
   1. The "SAP EcoHub" website opens.
4. Under "Find an Add-on", click Visit the Marketplace to View All Add-ons. Alternatively, you can
   1. click this link to go directly to the EcoHub.
   2. The website lists the available add-ons. Click the one you want to download.
5. Click Check Out.
   1. The "Sign In" dialog box opens.
6. In the "Sign In" dialog box, do one of the following:
   * + Enter your sign-in information and click Sign In.
     + To register, click Create New Account and follow the instructions.
7. Read the terms of the offering and select I agree to the Terms of Use checkbox. Click Checkout and follow the online instructions to download the file.
8. The add-on is available for installation. If the add-on was in a zipped folder, extract the files, and then install the downloaded add-on.
9. After you download an add-on, you must install it before you can use it.
10. Click File > Manage Add-Ons....

The "Add-On Manager" dialog box opens.

1. Click Install Add-On.
2. Navigate to the location where the add-on files were saved and extracted. Select the XLF file and click Open. The add-on is installed and available for use.
3. Click File > Manage Add-Ons....

The "Add-On Manager" dialog box opens.

1. From the list on the left, select the add-on you want to remove. Click Remove Add-On.

The "Confirm Add-on Removal" dialog box opens.

1. Click Remove.
2. To create a custom color for elements
3. Select the component and open the "Properties" panel.
4. On the Color tab, click the Color Selector ( ) for the appropriate element. The "Color" dialog box opens.
5. Click More Colors.
6. On the Custom tab, in the Color Model list, select RGB or HSL.
7. Set the color setting levels, that is, Red, Green, and Blue levels for RGB or Hue, Sat (Saturation),
8. and Lum (Luminosity) levels for HSL.
9. To apply the custom color to the selected element, click OK.
10. To format text elements
11. On the "Properties" panel for the component, select the Appearance view.
12. Click the Text tab.
    1. The Text tab shows a list of text elements available for the selected component. Text elements that are currently set to display in the model have a checkmark in the left column.
13. Click a text element that is currently displayed in the model.
14. In the "Format Selected Text" section, select the font, font size, format, justification, and text color settings.
15. If available, in the "Position" section, select where the label should be in relation to the component and, in "Offset", adjust the label position by setting a distance to move it relative to its position.
16. In the "Number Format" section, select one of the following number formats:
17. If additional formatting options are available, set them. The following options might be available:
18. configure chart scales
    1. Select the chart and open the "Properties" panel.
    2. In the "Properties" panel, click Behavior > Scale.
    3. If you are configuring a "Bullet Chart" and you want to configure a different scale for each series,

select the Configure Scale by Series option. Then select the series that you want to configure from

the list.

Use this option when you need to display metrics that are not closely comparable within a single

scale or when the series use different scale measures such as percent, count, and dollars.

* 1. Under "Scale", select one of the following options:
     1. Manual Axis

Select this option to set fixed scale limits that will not change to accommodate the data values.

If the data values exceed the specified scale range, the markers do not show the outlying values.

Users can see the values when in a tooltip when they move the mouse over the marker. If you

select this option, set the Maximum Limit and Minimum Limit for each scale axis.

* + 1. Auto Axis

Select this option to allow the scale limits to change to accommodate the data values, then set

the following options:

* Allow Zoom Out：

Only Select this option if you want the scale to grow as data values increase, but not shrink when the values decrease. This option minimizes the number of times the chart must rescale and is useful to reduce the impact on performance when the chart is included in an animation.

* Zoom Sensitivity

If Allow Zoom Out Only is selected, adjust the zoom sensitivity. This slider determines how much the axis scale increases as the chart values increase.

* 1. In the Axis Scale list for each chart axis, select one of the following options:
* Linear:A linear scale increases by adding a set amount to each scale marker (for example,1, 2, 3, 4). This is the most commonly used scale and works well when the data value range is fairly small.
* logarithmic ：A logarithmic scale increases in multiples. This scale is helpful when the data value range is broad or includes some values that are much larger than others. For example, a chart with values like 10, 100, and 60,000 does not fit well on a linear scale and the smaller values would be lost. A logarithmic scale can reveal structured relationships over many orders of magnitude.
  1. To lock the width of the axis labels and prevent them from being resized when the scale changes, select Fixed Label Size. With Fixed Label Size selected, axis labels can be abbreviated. For example, 12K would be displayed instead of 12,000.
  2. If Fixed Label Size is selected and you want to define the characters displayed for label abbreviations (K for thousands, M for millions, and so on), click the Manual Edit icon ( ) beside Label Abbreviations.
  3. If the Manual Axis option is selected, under "Divisions", select one of the following options:
* Number of Divisions

To set the number of scale markers to show on the axis. The value of the markers is determined by the range of the scale. If the scale changes, the values of the markers are adjusted to maintain

the same number of markers.

* Size of Divisions

To set the values of the markers based on a specific value that separates each marker. The

value of the markers is determined by adding this amount to the previous marker. If the scale

changes, the number of markers may change, but the values of the markers remain the same.

* 1. In the Minor Divisions list, select the number of grid lines to show between chart markers.

configure range sliders.

1. configure range sliders

1. Select the chart and open the "Properties" panel.

2. In the "Properties" panel, click Behavior > Common.

3. Select the Enable Range Slider checkbox.

The range slider is displayed below or beside the chart. The color of the slider is determined by the color theme of the model.

4. In the Beginning Range Value list, select one of the following options:

• Position: to specify a data position in the chart. For example, if 30 points are being plotted in the chart, setting the Position value to 2 would set the beginning of the range at the second data point.

• Category Label: to specify a category axis label. For example, if category axis labels are set to the days of the month, you could specify March as the beginning range value.

5. In the Beginning Range Value box, type a value or click the Cell Selector ( ) to select a cell in the embedded spreadsheet.

6. Repeat steps 4 and 5 to set the End Range Value.

7. Beside the Range Labels box, do one of the following:

• Click the Cell Selector ( ) to select cells in the spreadsheet.

• Click Manual Entry ( ) to type in the names of the labels. The range labels are distributed across the miniature chart. The placement of the labels depends on the number of data points and the total number of labels. For example, if there are 36 data points plotted on the chart and 4 labels, a range label is displayed every 8 data points configure data labels

1. configure range sliders

1. Select the chart component and open the "Properties" panel.

2. Click Appearance > Text.

3. In the Show column for Data Labels, select the checkbox.

If the chart contains multiple series, you can enable and configure data labels for each series individually. For "Combination" charts, you must configure some settings individually since line and bar markers have different properties.

4. To set the default format for all data labels, select Data Labels. To set the format for the data labels of an individual series, click the arrow in the Show column to expand the list of series, and then select a series.

5. In the "Format Selected Text" area, set the text appearance properties.

6. In the Position list, select where you want the label to appear relative to the data marker. The options available depend on the type of chart. They include Center, Inside End, Outside End, Best Fit, Left, Right, Above, Below, Inside Base, and Outside with Leader Lines (Pie charts only). For Combination charts, if Data Label is selected, the Position list is not available. You must select an individual series to set the position of its data labels.

7. In the Offset lists, select values to adjust the label location more specifically by setting the X and Y offsets.

8. You can also specify what data to include in the labels for all charts except "Candlestick Charts" and "OHLC Charts". The available data varies by chart, and can include the Series Name, Category Name, Value, Percentage, X Value, Y Value, Bubble Size, Size Value, and Color Intensity.

9. You can also choose a separator string for labels with multiple pieces of data. In the Separator list, select a value or select Custom and, in the Custom box, type the value to use.

1. configure alerts

If you want a component to indicate when its data value reaches a specific range, you can configure and customize alerts.）

1. Select the component and open the "Properties" panel.

2. Click the Alerts view.

3. Select Enable Alerts.

4. For "Scorecard", "Label-based Menu", "List Builder", "List Box", "Combo Box", and "Spreadsheet

Table" components, in the Alert Values box, specify the values to be compared to the target values

for alerts. Click the Cell Selector ( ) and select a source location in the spreadsheet for the values.

5. Select one of the following methods to use for the alerts:

* As a Percent of Max Value：For "Single Value" components, select this option to base alerts on percentages of the maximum value. The maximum value is determined by the Maximum Limit setting on the General view.
* As Percent of Target：Select this option to base the alerts on percentages of a target value that you specify.To set the target values by linking to cells in the embedded spreadsheet, click the Cell Selector ( ). To manually define the target values, click Manual Edit ( ).
* By Value：Select this option to base the alerts on values you set in the "Alert Thresholds" area.

6.For Bubble Charts, select an Alert Variable option:

* Value Set Select this option to base alerts on the X values, Y values, or bubble sizes.
* Use a Range Select this option to base alerts on a range of data in the Excel spreadsheet.

7. In the "Alert Thresholds" section, set the following options:

* Use a Range：Select this option to select the threshold levels from cells in the embedded spreadsheet, then click the Cell Selector ( ) to select the cells.
* Enter a Value：To manually define the threshold values, do the following:

1. Edit an existing threshold values：Click the value in the From or To column and type a

new value.

1. Add a threshold value to the list：Type a value in the box and click Add. This step creates a new alert range for the component.
2. Delete a threshold value：Click the X icon beside the value. An alert range is removed from the component.
3. Assign colors to threshold levels：Click the Color Selector beside each threshold value to set the color for the corresponding alert range. For more information about using the color selector, see Setting colors for component elements.

8. To automatically define the colors assigned to each threshold level, select Enable Auto Colors.

Note:

To manually assign colors to each threshold level, deselect this option and select the Color Selector

button beside each threshold level to set its color.

9. If Enable Auto Colors is selected, to set a different color gradient scheme, click Auto-color ( ).

10. In the Color dialog box, select a color scheme from the "Custom" or "Built-in" lists, or, to create a

new color gradient, click Create new gradient and set the following options:

* 2-Color Gradient：Select this option to create a gradient for the alert scale that includes 2 colors.
* 3-Color Gradient ：Select this option to create a gradient for the alert scale that includes 3 colors.
* Fill：Click the colors in this column to set background colors for each part of the alert gradient, and for parts of a component with no data.
* Font：Click the colors in this column to set text colors for each part of the alert gradient, and for parts of a component with no data.

11. Select a "Color Order" to specify which values are desirable. When you set the "Color Order", the colors for the alert thresholds are rearranged so that the same colors always represent desirable values.

* Low values are good：Use this option when the ideal value is lower than the target value. For example, select this option for a component that displays expenses that you want to minimize.
* Middle values are Good：Use this option when the ideal value is the target value. For example, select this option for a component that displays inventory quantities that you want to be as accurate as possible.
* High values are good：Use this option when the ideal value is higher than the target value. For example,select this option for a component that displays revenue values that you want to maximize.

12. For "Vertical Slider", "Horizontal Slider", "Horizontal Progress Bar", "Dial", "Dual Slider", and "Gauge" components, select where you want the alert color to appear:

* Background The component background displays the alert color.
* Marker The marker, needle, and so on display the alert color.
* Value：The alert color is added as a background to the text box that displays the current value.

1. configure alert icons for a Scorecard

1. Select the "Scorecard" and open the "Properties" panel.

2. On the "Properties" panel, click the Alerts view and select the column that you want to configure

alert icons for.

3. To configure icons individually, for each alert range, click the Icon Selector ( ), and in the "Icon"

dialog box, select a shape and a color for the icon.

4. To select a preset group of icons, click Auto Icons ( ) and select an icon set.

The icon sets are divided into groups based on the number of icons in the set. If possible, select a

set with one icon for each alert threshold.

5. To create a custom icon set, click Auto Icons ( ) and click Create New Icon Set. Configure the

options for the icon set and then click Ok. You can set the following options:

* Number of Icons：Select the number of icons to include in the set. Icon sets are most effective when the number of icons matches the number of alert ranges.
* Color：Click the colors in this column to set colors for each icon. The icons at the top of the column represent desirable values, and the lower icons represent less favorable values.
* Shape：Click the Icon Selectors ( ) in this column to set shapes for each icon. The top icons represent desirable values, and the bottom icons represent unfavorable values.

6. Repeat these steps for other columns in the "Scorecard" as necessary。

1. set up dynamic visibility

1. Add a component to the canvas and open the "Properties" panel.

2. On the "Properties" panel, click Behavior > Common.

3. In the "Dynamic Visibility" area, beside the Status box, click the Cell Selector ( ) and select the

cell in the spreadsheet that controls the component's visibility.

4. In the Key box, type a value or click the Cell Selector ( ) and select a cell that contains the key

value for this component.

When the value in the Status cell matches the key value, the component becomes visible.

5. Add another component to the canvas to insert the value of the Status cell.

Typically, you use a selector component such as a "Check Box" or a "Radio Button" to allow users

to choose whether components are visible. You can also use a chart or a map component that is

configured to insert data into the Status cell, however.

6. On the General view of the "Properties" panel for the selector, configure the Source Data so that

it matches the Key values for the components it is controlling.

7. In the Destination box, click the Cell Selector ( ) and select the Status cell for the components

with dynamic visibility.

1. create a template

While Dashboards come with predefined templates, you can also create and save your own templates.

For example, if you are creating a set of Portlets for use in your corporate portal, you may want to save

your models as templates so you can re-use them when updates are necessary. To save one of your

models as a template, do the following:

1. Create a model that you want to save as a template.

2. Click File > Save As....The "Save As" dialog box opens.

3. Navigate to the folder where the Dashboards program is installed and then to the following location: ...\assets\template.

4. In the File name field, type a file name for the template and click Save.

5. Click File > Export > Flash (SWF)....

6. Navigate to the templates folder where you saved the template.

7. In the File Name list, type the same file name for the SWF file that you entered for the template and

click Save.

If you want to change the look of your model, you can apply a theme to set the style and property

settings for all components.

1. Click Format > Theme.

2. From the "Theme" list in the left panel, select a theme.

The "Preview" area shows how a small sample dashboard would look with that theme.

3. Click OK.

The model is changed to use the styles and properties for the selected theme.

If you frequently use the same theme when creating models, you can set it as the default so it is used

each time you create a new model.

1. Click File > Preferences.

2. In the "Preferences" dialog box, click Document.

3. From the Default Theme list, select a theme.

4. Click OK.

1. Using color schemes

You can change the way your model looks by changing its color scheme. You can apply the new color scheme to new components only or choose to apply the change to existing components as well.

1. Open a model.

2. Click Format > Color Scheme.

3. In the "Color Schemes" dialog box, select the color scheme you want to apply.

4. If you want the color change to apply to components already in the model, click Apply to Existing

Components. Otherwise, the color scheme is only applied to the canvas and any new components

you place on the canvas.

5. Click OK.

If you frequently use the same color scheme when creating models, you can set it as the default so it

is used each time you create a new model.

1. Click File > Preferences.

2. In the "Preferences" dialog box, click Document.

3. From the Default Color Scheme list, select a color scheme.

4. Click OK.

To share the color scheme with other work stations, copy the custom color scheme XML file to the

same file location on the other system.

1. Click Format > Color Scheme.

The "Color Schemes" dialog box opens.

2. In the "Color Schemes" dialog box, select a color scheme to modify and click Create New.

3. In the "Color Schemes" dialog box, set the following options:

* Name ：Type a name for the new color scheme.
* Color bar：Click the color you want to change and, from the color selector, click the color you want to change it to.
* Auto Match Colors：If you want the software to select a color palette based on a selected color, select the color you want to base the palette on and select this option. Move the slider to have the software adjust the palette to be more like the selected color or less like it.
* Advanced：If you want to set the color for specific elements in components, click Advanced. In the Advanced area, click the tabs to view the elements for each component. Click the color box beside each element name and select the color you want to apply to that element.

4. Click Save

1. add Excel XML maps to models

To add an XML map to the embedded spreadsheet, you can set up the map in the Excel spreadsheet

and then import the spreadsheet into Dashboards or, if XML features are enabled in Dashboards, you

can create the XML map in Dashboards. For more information about creating Excel XML maps, see

the Microsoft Excel Online Help. Once the map is available in the spreadsheet, you can add components

to the canvas and link them to the spreadsheet, and add an Excel XML map data connection to retrieve

data from the XML source.

1. To add an Excel XML map to the embedded spreadsheet, do one of the following:

• If you set up the XML map in your Excel spreadsheet, import the Excel spreadsheet. For more

information about importing spreadsheets, see To import Excel spreadsheets.

• To create the XML map directly in Dashboards:

a. On the embedded spreadsheet, for Excel 2007, click the Developer tab and then click Import

XML Data, or for Excel 2003, on the toolbar, click Import XML Data.

b. In the "Import XML" dialog box, in the File Name list, type the URL for your XML data source

and click Open.

c. If the XML content doesn't incorporate a schema definition, Excel can create a schema based

on the source data. Click OK.

d. In the "Import Data" dialog box, select where you want to store the data and click OK.

e. Embed the URL that will be used to fetch data in the underlying spreadsheet, for example,

enter a static query (the same URL used to import the XML data) in a cell in the spreadsheet.

f. Set up input cells in the spreadsheet and convert the static query to an interactive query using

a formula that reads the values from the spreadsheet cells.

2. Add components to your model and link them to the cells in the spreadsheet.

3. Click Data > Connections.

4. In the "Data Manager" dialog box, click Add and select Excel XML Maps.

An Excel XML Map connection is added to the list of connections.

5. On the Definition tab, set the following options:

* Name： Type a name for the connection.
* XML Data URL：Select the location where the model will retrieve updated data. You can map

this to the URL where the XML data is stored or to the cell in the spreadsheet where you defined an interactive query formula.

6. To set the refresh and load status options, click the Usage tab. For more information about setting these options, see To set refresh options and To create load and idle messages.

7. Save your model and export it to a suitable format.

1. enable XML features with Excel 2003

1. If Dashboards or Excel are running, close both applications.

2. Launch Excel 2003.

This should be the only instance of Excel running.

3. In Excel, click Tools > Customize.

4. In the "Customize" dialog box, click the Toolbars tab, click New, and enter a name for the toolbar,

for example, XML Toolbar. Click OK.

An empty, floating toolbar is created.

5. In the "Customize" dialog box, click the Commands tab.

6. In the "Categories" list, select Data, then in the "Commands" list, select XML Source, Import XML

Data, and XML Map Properties. Drag these items to the floating toolbar you created in step 4.

7. Drag the floating toolbar and park it along the other Excel toolbars at the top of your application

window, and then close Excel.

1. connect a prompt to the spreadsheet

You want values entered by a prompt to be inserted into the spreadsheet. This functionality is best used

in conjunction with a "Query Prompt Selector" component bound to a prompt. This allows the "Query

Prompt Selector"'s data, which can be entered at runtime, to be used by other components.

1.In the "Query Browser", click the expand arrow ( ) of the query containing the prompt you want to connect.

2. Click the "Prompts" expand arrow ( ).

3. Select the prompt object you want to connect to the spreadsheet.

4. Click the "Connect to Spreadsheet" expand arrow ( ).

5. Click "Selected Values" ( ) and do one of the following:

• Type the cell range directly into the input box.

• Use the mouse cursor to select a range.

The "Select a Range" dialog box will open.

6. Click OK.

7.

Click "Insert List of Values" ( ) and do one of the following:

• Type the cell range directly into the input box.

• Use the mouse cursor to select a range.

8. Click OK.

1. pass parameters to Live Office

To pass parameters to Live Office, the model must contain a Live Office connection.

When you adjust the Single Value component in the SWF file, you receive a prompt to log on to your

BI platform system. When you have successfully logged on, the data is refreshed and the new value

or values are reflected in your SWF file.

1. Place a Single Value component such as a dial or a slider on the canvas.

2. On the General view of the Single Values properties browser, click the Cell Selector button next to the Data field.

3. Click the cell that contains the bound parameter and then click OK.

4. Add and configure a Live Office connection. For more information, see To add and configure Live

Office data connections.

5. On the Usage tab, click the Cell Selector button beside the Trigger Cell field.

6. Click the cell that contains the bound parameter and then click OK.

7. Ensure that Trigger on Change only is selected. Configuring the Trigger Behavior this way causes the SWF to refresh each time there is a change to the cell and in this case, the parameter value.

8. Click the Preview button to generate a SWF file.

1. set up translation for models on SAP NetWeaver BW systems

1. Click SAP > Translation Settings.

2. If you are not connected to the SAP system, the "SAP Logon" dialog box opens. Select the appropriate

SAP system and enter your credentials. Click OK.

If you are connected to a different SAP system than you want to publish to, you must disconnect

from the SAP network before continuing these steps.

3. In the "Translation Settings" dialog box, select the Enable Support for Translation option.

4. Below the Ranges list, click Add.

5. In the Name box, type a name for the range.

6. Beside the Range box, click the "Cell Selector" ( ) and select a cell.

7. To translate multiple texts, Repeat steps 4 to 6.

8. To minimize the impact of translated words on the model design and spacing, do one of the following:

This setting is not supported in SAP NetWeaver 7.0 Enhancement package 01 SP 05. However, it

is a good practice to set this option for models, so they will work correctly once the option is supported

by SAP NetWeaver and you won't need to republish them.

• To enter specific values, beside the Maximum Number of Characters box, click Manual Edit

( ) and, on the Number of Characters Settings dialog box, specify the maximum number of

characters allowed for each string.

• To select values from the embedded spreadsheet, beside the Maximum Number of Characters

box, click the Cell Selector ( ) and select the cells that will store the values for the maximum

number of characters.

9. Click OK.

1. make a file trusted in Adobe Flash Player Settings Manager

Flash Player Settings Manager.

1. To open the Adobe Flash Player Settings Manager, go to http://www.macromedia.com/support/doc

umentation/en/flashplayer/help/settings\_manager04.html.

2. On the Adobe Flash Player Settings Manager page, in the "Table of Contents", click Global Security Panel Settings.

3. Select the Always Allow option.

4. In the Always trust files in these locations list, select Edit locations > Add location.

5. Browse to the location of the SWF file (or container file such as PowerPoint, HTML, and so on) and

click Open.

6. Click Confirm.

1. To add an object in the CMC

If you have administrative rights to BI platform, you can add objects over the Internet from the CMC.

Use the CMC to add single objects or to perform administrative tasks remotely.

1. Go to the "Folders" management area of CMC.

2. Locate and select the folder to which to add an object.

3. Select Manage > Add, and then select Program File to add a program object or Local Document

to add other types of objects.

4. In the dialog box that appears, specify the properties of the object.

The properties fields that appear vary according to the type of object you chose (program file or

local document). The properties fields are summarized in the table “Object properties in the CMC”.

5. To assign the object to a category, select the category in the list.

6. Click OK.

The CMC refreshes and displays the folder contents, including the object you added.

1. Working with folders

To create a subfolder, first select the target folder where you want to create a new folder.

1. Go to the "Folders" management area of CMC.

2. Navigate to where you want to create the folder.

3. Select Manage > New > Folder.

4. In the "Create folder" dialog box, type a name for the new folder.

5. Click OK.

When you delete a folder, all subfolders, reports, and other objects it contains are removed from BI

platform.

1. Go to the "Folders" management area in CMC.

2. Select the folder to delete.

3. Select Manage > Delete.

4. Click OK to confirm the deletion.

When you copy or move a folder

1. Go to the "Folders" management area of CMC.

2. Select a folder to copy or move.

If the folder is not at the top level, locate its parent folder and select the parent folder.

3. Select Organize > Copy To or Organize > Move To.

4. Select the destination folder.

5. Click Copy or Move.

The folder you selected is copied or moved to the new destination Setting limits allows you to automatically delete report instances in BI platform.

1. Select a folder, and select Actions > Limits.

2. To limit the number of instances per object, select the Delete excess instances when there are more than N instances of an object check box, and type the maximum number of instances to retain on the system in the box. The default value is 100.

3. Under Delete excess instances for the following users/groups:

a. To limit the number of instances per user or group, click Add.

b. Select available users or groups, and click > to add the users or groups to the Selected

users/groups list.

c. Click OK.

d. For each user or group you selected, in the Maximum instance count per object per user box,

type the maximum number of instances to remain on the system.

The default value is 100.

4. Under Delete instances after N days for the following users/groups:

a. To limit the age of instances per user or group, click Add.

b. Select available users or groups, click > to add the users or groups to the list of Selected

users/groups.

c. Click OK.

d. For each user or group you selected, in the Maximum instance age in days box, type the

maximum age of instances. The default value is 100.

1. Working with categories

To create a new category

1. Go to the "Categories" management area of the CMC.

2. Click Manage > New > Category.

3. Type a name for your category.

4. Click OK.

The new category is added to the system. Click Manage > Properties to change settings for this category.

When you delete a category, all subcategories within it are removed. Unlike folder deletion, the reports and other objects contained within the category are not deleted from the system.

1. Go to the "Categories" management area of the CMC.

2. Select the category to delete.

If the category is not at the top level, locate the parent category and make your selection.

3. Click Manage > Delete.

4. Click OK to confirm that you want to delete the category.

When you move a category.

1. Go to the "Categories" management area of the CMC.

2. Select the category that you want move.

If the category you want to move is not at the top level, locate its parent category. Then you’re your selection.

3. Click Organize > Move To.

4. Select the destination category.

5. Click Move.

The category you selected is moved to the new destination. Follow this procedure to add an object to a category.

1. Go to the "Folders" management area of the CMC.

2. Navigate to the object you would like to add to a category and select it.

3. Click Manage > Categories.

4. Select the categories to which you want to add the object.

5. Click Save & Close.

You can either remove or delete objects from a category.

1. Go to the "Categories" or "Personal Categories" management area of CMC.

2. Double-click the category to remove or delete an object from.

3. Select the object or objects to remove or delete.

4. Remove the object from the category or delete the object.

• Click Actions > Remove From Category to remove the object from the category only. This does

not remove it from BI platform.

• Click Manage > Delete to remove the object from the category and delete it from BI platform.

If you are granted the appropriate rights, you can view, edit, and delete users' personal categories.

1. Go to the "Personal Categories" management area of the CMC.

2. Click the user account whose personal categories you want to view.

A list of the user's personal categories appears.

Perform this task to add multiple objects to a single category.

1. In the "Categories" or "Personal Categories" area, navigate to a category.

2. Click Actions > Add to Category.

The "Add to Category" dialog box appears.

3. In the Available Objects area, browse for the objects you want to add and click > to move them to the Selected Objects list.

4. When you are finished, click OK.

1. General object management

If you want to copy an object:

1. In the "Folders" area, browse for the object that you want to copy and select it.

2. Click Organize > Copy To. The "Copy" dialog box appears.

3. In the Select destination(s) area, browse for the destination folder you want to copy the object to, and click > to move it to the Destinations list.

4. When you are finished, click Copy.

The object you selected is copied to the destination.

If you want to move an object：

1. In the "Folders" area, browse for the object you want to move and select it.

2. Click Organize > Move To.

The "Move" dialog box appears.

3. Select the destination folder.

4. Click Move.

The object moves from the origin folder to the destination folder.

Shortcuts are useful for granting a user access to an object without giving that user access to the entire

folder in which the object is located. After you create the shortcut, users who have access to the folder

where the shortcut is located can access this object and its instances.

1. In the "Folders" area, browse for the object that you want to create a shortcut for and select it.

2. Click Organize > Create Shortcut In.

The "Create Shortcut In" dialog box appears.

3. In the "Select destination(s)" area, browse for the folder you want to create a shortcut in, and click

> to move the folder to the Destinations list.

4. Click Create Shortcut.

A shortcut to the object appears in the folder you specified.

This procedure explains how to delete either a single object or multiple objects：

1. Go to the "Folders" management area of the CMC.

2. Select the object that you want to delete.

3. Click Manage > Delete.

4. When you are prompted by a confirmation message, click OK.

This search feature lets you to search for specific text within object titles or descriptions.

1. Go to the "Folders" management area of CMC.

The Search field is located in the upper right-hand corner of the "Folders" management area. The

search type is set to Search title by default.

2. Specify the search criteria.

a. If you want to search by something other than the file name, click Search title to change the

search type.

Your options are:

• Search all fields

This option searches file names, keywords, and descriptions associated with objects.

• Search title

This option is the default option and searches file names.

• Search keyword

This option searches the keywords that are associated with objects.

• Search description

This option searches the descriptions that are associated with objects.

b. Enter the text that you want to search for in the Search field.

3. Click Search.

When the search is finished, a list of results that match your search criteria appears.

If you want to create a new hyperlink:

You can send either a copy of an object or instance, or a shortcut to the object or instance. You can

also select the destination, for example, FTP or BI Inbox. Not all types of objects can be sent to all

destinations.

1. Go to the "Folders" management area of CMC.

2. Select the object or instance that you want to send.

• If you want to send an object, select it, click Organize > Send and choose a destination.

• If you want to send an instance, select the object and click Actions > History. In the "History"

dialog box, select an instance, click Send, and click the destination option that you want. Select only instances with a status of Success or Failed. Instances with a status of Recurring or Pending are scheduled and do not contain any data yet.

If you want to change the properties of an object:

1. In the "Folders" management area of CMC, select an object.

2. Click Manage > Properties.

The "Properties" dialog box appears.

3. Make your changes.

You can change the object name, keywords, and description.

4. When you are finished, click Save & Close.

If you want to check the relationships of an object：

1. Navigate to the object for which you would like to run the relationship query.

2. Click Manage > Tools > Check Relationships.

The "Query Results" area with the results of your relationship query is displayed.

3. To navigate back to your original query, select the name of the object from the Tree panel.

1. set CMC preferences

Use the "Preferences" area of the CMC to customize your administrative view of BI platform.

1. In the CMC, click Preferences in the upper-right corner.

2. Set the preferences as needed.

CMC preferences work the same as in BI launch pad—except CMC preferences affect both the

CMC and BI launch pad. See also preferences information in the SAP BusinessObjects Business

Intelligence Launch Pad User Guide.

3. Click Save & Close.

The preferred viewing locale (PVL) sets how dates, times, and numbers are formatted.

1. The system displays the name and description that correspond to the user's PVL.

BI platform may use a default fallback locale, but it is typically a variation of the user's PVL. For

example, if the PVL is French (Canada) and the object does not have a translated name and

description in Canadian French, BI platform will use French (France).

2. If no PVL is set, BI platform displays the name and description in the same language as the product

locale.

3. If none of the preceding options is feasible, BI platform displays the name and description in the

object's source language.

1. Adding objects to BI platform

If you have administrative rights to BI platform, you can add objects over the Internet from the CMC.

Use the CMC to add single objects or to perform administrative tasks remotely.

1. Go to the "Folders" management area of CMC.

2. Locate and select the folder to which to add an object.

3. Select Manage > Add, and then select Program File to add a program object or Local Document

to add other types of objects.

4. In the dialog box that appears, specify the properties of the object.

The properties fields that appear vary according to the type of object you chose (program file or

local document). The properties fields are summarized in the table “Object properties in the CMC”.

5. To assign the object to a category, select the category in the list.

6. Click OK.

The CMC refreshes and displays the folder contents, including the object you added.

1. Setting report refresh options

If you want to set refresh options for a report：

1. In CMC, go to "Folders" management and select a report.

2. Click Actions > Refresh Options.

The "Refresh Options" dialog box appears.

3. Choose report elements to refresh from the source report file.

4. Click Update.

If you want to set report viewing options for a report：

1. In the "Folders" management area of CMC, select a report.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Viewing Server Group on the navigation list.

4. In the "Data refresh for viewing" area, click Use report specific viewing settings, and then select

the options that you want to set for this report.

5. Click Save & Close.

If you want to specify default servers for processing an object：  
1. In the "Folders" management area of CMC, select an object.

2. Click Manage > Default Settings.

3. In the "Default Settings" dialog box, perform one of the following actions:

• To specify the default servers for scheduling a report object, use Manage > Default Settings >

Scheduling Server Group.

• To specify the default servers for processing an object when you view it, select Viewing Server

Group if the object is a Crystal report or Web Intelligence Process Settings if the object is a

Web Intelligence document.

4. Click Save & Close.

If you want to change the database settings：

1. In the "Folders" management area of CMC, select a report object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Database Configuration on the navigation list.

4. Select Use original database logon information from the report or Use custom database logon

information specified here.

* If you select the first option, you can specify a user name and password to be used with the original report database.
* If you select the second option, you can specify a server name (or a DSN in the case of an ODBC data source), a database name, a user name, and a password for a number of predefined database drivers, or for a custom database driver that you've specified. If you've changed the default table prefix in your database, specify a custom table prefix here.
* For information about supported databases and drivers, refer to the Supported Platforms documents on the SAP Service Marketplace.

5. Select the database logon option you want.

• Prompt the user for database logon

The system will prompt users for a password when they refresh a report.

6. Click Save & Close.

If you want to update default prompt values for a Crystal report：

1. In the "Folders" management area of the CMC, select a report object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Prompts on the navigation list.

4. Under the "Default Value" column, click the value associated with the parameter you want to change.

Options appear that allow you to change the default value. Depending on the parameter value type,

you either type a value in the field or choose a value from a list.

5. Click the Clear Value button if you want to clear the current value that is set for the specified

parameter.

6. Select the Prompt when viewing check box if you want your users to be prompted when they view

a report instance through a BI platform application such as BI launch pad.

7. Click Save & Close.

If you want to update the prompts for a Web Intelligence document：

1. In the "Folders" management area of the CMC, select a Web Intelligence document.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Prompts on the navigation list.

4. Click Modify.

Options appear that let you select a prompt and values.

5. Select the prompt and enter a value for the prompt.

6. Repeat steps 5 and 6 for every prompt value you want to change.

7. Click Apply.

8. Click Save & Close.

1. Setting printer and page layout options

If you want to assign a printer：

1. In the "Folders" management area of CMC, select a report object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Print Settings on the navigation list.

4. Select Print Crystal reports when scheduling.

The report is automatically sent to the printer in SAP Crystal Reports format. This does not interfere

with the format selected when scheduling the report.

5. Leave Default printer selected if you want to print to the Job Server's default printer; otherwise,

select Specify a printer.

6. If you selected Specify the printer, enter a printer's path and name.

7. Set the rest of your print options:

• Number of copies

• Page range

• Collate option

• Page scaling

• Center the page

• Fit horizontal pages into one page

8. Click Save & Close.

If you want to set a report's print layout options：

1. In the "Folders" management area of CMC, select a report object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Print Settings on the navigation list.

4. Select a default print mode.

• Always print to PDF

This option uses PDF print mode settings when you print the report from a web viewer.

• Follow Crystal Reports preference setting

This option uses settings for Crystal reports defined in CMC user preferences.

5. On the "Set layout to" list, change your settings for the layout you want.

The options are as follows:

• Report file default

Choose this option if you want the page layout to conform to the settings that were chosen for the report in SAP Crystal Reports.

• Specify printer settings

Choose this option if you want the page layout to conform to the settings of a specified printer. You can choose the Job Server's default printer or another printer.

When you choose this option, you can print scheduled report instances only to the printer you specify in the Print when scheduling area. In other words, you cannot set your report to display

with one printer's setting and then print to a different printer.

• Custom settings

Choose this option if you want to customize all page layout settings. You can then choose page

orientation and page size.

6. Click Save & Close.

1. Viewing reports

If you want to view a report in BI launch pad：

1. In a web browser, type the URL for BI launch pad: http://webserver:portnumber/BOE/BI

Replace webserver with the name of the web server and portnumber with the port number for BI platform. You may need to ask your administrator for the name of the web server, the port number, or the URL to enter.

2. In the Authentication list, select SAP.

3. In the SAP System ID box, type the three-character System ID (SID) for your SAP system.

Contact your administrator if you are unsure of the appropriate SID.

4. In the SAP Client box, type your three-digit SAP client number.

5. In the User Name and Password boxes, type your usual SAP logon credentials.

6. Click Log On.

You are logged on to BI launch pad.

7. Click the My Groups folder for quick access to all objects that have been saved in your various SAP

roles and published to BI platform.

If you want to view a published report through SAP Easy Access：

1. Log on to SAP Easy Access.

2. Browse your roles to locate the reports that have been saved to SAP NetWeaver BW.

3. Double-click the report.

1. Parameters

If you want to view a report with default parameter values：

The default value for a report parameter is set in the SAP environment (while the query is being

designed).

1. Log on to BI launch pad.

2. Double-click the object you want to view.

The "Enter Prompt Values" dialog box appears.

3. Click OK.

The report appears in your Crystal report viewer. It contains only data that is based on the default

values that were assigned to the parameter.

If you want to view a report using parameter values from a dynamic picklist：  
1. Log on to BI launch pad.

2. Navigate to the object that contains variables and double-click it.

The" Enter Prompt Values" dialog box appears.

3. Beside a parameter, click the “…” button.

The Picklist screen appears.

4. Search the list for the value you want for the parameter; when you find it, click its hyperlink.

You return to the "Enter Prompt Values" dialog box. The value that you selected appears in the edit field for the parameter.

5. Repeat Steps 3 and 4 for other parameters, and then click Execute.

The report appears in your Crystal report viewer showing data based on the parameter values you selected.

If you want to view a report with null parameter values：

1. Log on to BI launch pad.

2. Navigate to the object that contains variables and double-click it.

The "Enter Prompt Values" dialog box appears.

3. Ensure that Set to null for each parameter.

4. Click OK.

If you want to view a report with personalized parameter values：

1. Log on to BI launch pad.

2. Navigate to the object that contains variables and double-click it.

3. Personalize a value for a parameter by doing one of the following:

• Select a value from the list and click the Personalize icon to set it as your personalized

value.

• Click the parameter's edit field, type a value, and then click the Personalize icon to set it as your

personalized value.

1. Setting program processing options

If you want to specify command-line arguments：

1. In the "Folders" management area of CMC, select the program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters on the navigation list.

4. In the Arguments field, type the command-line arguments for your program, using the same format you would use at the command line itself. For example, if your program has a loops option, to set the loops value to 100, you might type -loops 100.

5. Click Save & Close.

If you want to set a working directory for a program object:

1. In the "Folders" management area of CMC, select the program.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters on the navigation list.

4. In the Working Directory field, type the full path to the directory that you want as the program object's working directory.

5. Click Save & Close.

If you want to specify paths to required files modify the default working directory for program objects：

1. Go to the "Servers" management area of the CMC.

2. Select the Adaptive Job Server that hosts the Program Scheduling Service.

To check whether an Adaptive Job Server hosts the Program Scheduling Service, select the server

and click Manage > Properties.

3. Click Manage > Properties.

The "Properties" dialog box appears.

4. In the Temporary Directory field, type the full path to the directory you want to set as the working

directory.

5. Click Save & Close.

1. Configuring executable programs

If you want to specify paths to required files：

1. In the "Folders" management area of CMC, select the executable program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters on the navigation list.

4. In the External Dependencies field, type the full path to the required file and click Add.

5. Repeat step 4 for each file required.

6. Click Save & Close.

If you want to upload required files：

1. In the "Folders" management area of the CMC, select the executable program object.

2. Click Actions > Associated Files.

3. Click Browse to navigate to the required file, then click Add File.

4. Repeat step 3 for each required file.

5. Click Save & Close.

If you want to add an environment variable：

1. In the "Folders" management area of CMC, click the program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters.

4. In the Environment Variables field, type the environment variables you want to set, and then click

Add.

5. Click Save & Close.

1. specify required parameters for Java programs

To successfully schedule and run a Java program, you must provide BI platform with the base name

of the .class file that implements the IProgramBase interface from the BI platform Java SDK.

1. In the "Folders" management area of CMC, select the Java program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters on the navigation list.

4. In the Class to run field, type the base name of the .class file that implements the IProgramBase from the SAP BusinessObjects Business Intelligence Platform Java SDK.

For example, if the file name is Arius.class, type Arius.

5. Click Save & Close.

If you want to provide Java programs with access to other files：

You can provide Java programs with access to files, such as Java libraries, located on the Program

Scheduling Service machine.

1. In the "Folders" management area of the CMC, select the Java program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Parameters on the navigation list.

4. In the Classpath field, type the full paths to the locations of any Java library files that are required

by the Java program, and stored on the Adaptive Job Server that hosts the Program Scheduling

Service.

You must separate multiple paths with the classpath separator that is appropriate to your operating

system: a semi-colon for Windows, a colon for UNIX.

5. Click Save & Close.

If you want to specify a user account for a program object：

1. In the "Folders" management area of CMC, select the program object.

2. Click Manage > Default Settings.

The "Default Settings" dialog box appears.

3. Click Program Logon on the navigation list.

4. In the User Name and Password fields, type credentials for the user account under which the

program should run.

5. Click Save & Close.

1. Object package management

If you want to create a new object package：

1. Go to the "Folders" management area of the CMC and navigate to the folder that you want to create

the object package in.

2. Click Manage > New > Object Package.

The "Object Package" dialog box appears.

3. Enter a title, description, and keywords for your object package.

4. Click OK.

If you want to add a new object to an object package：

1. In the "Folders" management area of CMC, double-click an object package.

The object package's contents are displayed in the Details panel.

2. Click Manage > Add > Local Document or Program File depending on the object you want to add.

Different dialog boxes appear depending on the option you selected.

3. Click Browse and select the object that you want to add.

4. Set the appropriate properties.

• If you are adding a report, do the following:

• Select Use description from report if you want to preserve the report's summary information.

• Select Keep saved data if you want to keep the report's saved data.

• If you are adding a program object, set the program type by clicking Executable, Java, or Script.

5. Click OK.

If you want to set component failure options for an object package：

Perform this task to specify how component failure affects an object package at run time.

1. In the "Folders" management area of CMC, navigate to the object package and select it.

2. Click Manage > Default Settings.

3. Click Component Failure on the navigation list.

4. Select or deselect the Scheduled package fails upon individual component failure check box.

5. Click Save & Close.

1. Setting options for scheduling

If you want to schedule an object：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule.

The "Schedule" dialog box appears, showing the default settings for the object.

3. Enter an appropriate instance title.

4. Click Recurrence and select the recurrence pattern you want.

For example, select Weekly.

5. Specify the parameters that you want.

For example, specify Monday, Wednesday, and Friday.

6. Set any of the other schedule options and parameters as required.

7. Click Schedule.

If you want to change the Schedule For settings for an object：

1. In the "Folders" management area of the CMC, select a report object.

2. Click Actions > Schedule.

3. On the navigation list, click Schedule For.

4. Select who you want to schedule the object for.

• Schedule only for myself

• Schedule for specified users and user groups

5. If you selected Schedule for specified users and user groups, navigate to and select the users and groups you would like to schedule for and click > to add them to the Selected list.

6. Set the rest of your scheduling options and click Schedule.

1. Selecting a destination

If you want to set your destination as the default：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule and view your destination settings.

For example, for a Crystal report or object package, click Destinations.

3. Select Default Enterprise Location as the destination.

For example, for a Crystal report or object package, select Default Enterprise Location in the

Destination list.

4. Set the remaining scheduling options and click Schedule.

If you want to schedule an object to a BI Inbox destination：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule and view your destination settings.

For example, for a Crystal report or object package, click Destinations.

3. Select BI Inbox as the destination.

For example, for a Crystal report or object package, select BI Inbox from the Destination list.

4. Choose whether to use the Job Server's default settings.

For example, for a Crystal report or program object, select or deselect Use default settings.

5. If you chose not to use the Job Server's default settings, complete the following steps:

a. Move users from the "Available Recipients" list to the "Selected Recipients" list.

b. Choose whether to use an automatically generated name or a specific name for the instance.

c. Choose whether to send the instance as a shortcut or a copy.

6. Choose whether to enable instance cleanup.

For example, for a Crystal report or program object, select or deselect Keep an instance in the

history.

When this option is selected, the system automatically deletes the report or program instance from

the Output File Repository Server to keep the number of instances on the server to a minimum.

7. Set your other scheduling options and click Schedule.

If you want to schedule an object to an email destination：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule and view your destination settings.

3. On the "Schedule" page, click Destinations to view your destination settings.

4. In the Destination list, select Email as the destination.

5. Select or clear the Use default settings check box to indicate whether to use the job server's default

settings.

If you want to set the destination to a file location：

1. In the "Folders" management area of CMC, select an object.

2. Click Actions > Schedule and view your destination settings.

For example, for a Crystal report or object package, click Destinations.

3. Select a file location as the destination.

For example, for a Crystal report or object package, select File System from the Destination list.

4. Choose whether or not to use the Job Server's default settings.

For example, for a Crystal report or program object, select or deselect Use default settings.

5. Choose whether to enable instance cleanup.

6. Set other scheduling options as needed, and click Schedule.

If you want to set the destination to an FTP server：

1. In the "Folders" management area of CMC, select an object.

2. Click Actions > Schedule and view your destination settings by doing one of the following:

For example, for a Crystal report or object package, click Destinations.

3. Select FTP Server as the destination.

For example, for a Crystal report or an object package, select FTP Server in the Destination list.

4. Choose whether or not to use the Job Server's default settings.

5. Choose whether to enable instance cleanup.

6. Set your other scheduling options and click Schedule.

If you want to schedule an object to a StreamWork workspace：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule and view your destination settings.

For example, for a Crystal report or object package, click Destinations.

3. Select SAP StreamWork as the destination.

4. Update the StreamWorks settings you want to use.

5. Choose whether to enable instance cleanup.

6. Set your other scheduling options and click Schedule.

If you want to enable or disable destinations for a job server：

1. Go to the Servers management area of the CMC.

2. Select the Adaptive Job Server for which you want to enable or disable a destination.

3. Choose Properties from the Manage menu.

4. In the Properties dialog box, click Destinations in the navigation list

5. To enable a destination, select it in the Destination list and click Add.

6. To disable a destination, select it in the Destination list and click Remove.

7. Click Save or Save & Close.

1. Specifying alert notification

If you want to schedule an object to run based on an event：

1. In the "Folders" management area of the CMC, select a report object.

2. Click Actions > Schedule.

3. On the navigation list, click Alert Notification.

4. Select the Enable alert notification check box if you want to send an alert notification.

5. Select either Use default settings or Custom settings.

6. Type the URL for the viewer in which you want email recipients to view the report, or select the

default viewer by clicking Use default.

7. Type the maximum number of alert records to be included in the alert notification.

8. When you have finished setting all your scheduling options, click Schedule.

1. Choosing a format

If you want to select a format：

1. In the "Folders" management area of CMC, select a report object.

2. Click Actions > Schedule and view the format settings.

For example, for a Crystal report, click Formats.

3. Select the appropriate format.

For example, for a Crystal report, select the format on the Format list.

4. Set the rest of your scheduling options and click Schedule.

If you want to select a cache format for Web Intelligence documents：

1. In the "Folders" management area of the CMC, select a Web Intelligence document object.

2. Click Actions > Schedule and click Caching.

3. Select the format you want to pre-load the cache with.

Your options are:

• Microsoft Excel

• Standard HTML

• Adobe Acrobat

4. Select the locale(s) with which to pre-load the cache.

When you schedule the Web Intelligence document, BI platform generates cached versions of the

document in the locale(s) that you specify.

5. Set the rest of your scheduling options and click Schedule.

If you want to scheduling an object with events：

1. Scheduling an object with events

If you want to schedule an object to run based on an event：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule.

3. Click Recurrence on the navigation list and choose an option on the Run object list.

4. Complete the schedule parameters for your object (start date, end date, and so on).

5. Click Events, select from the list of Available Events, and click > to add the event(s) to the list of

Events to wait for.

6. Click the Schedule button to schedule the object.

If you want to schedule an object to trigger an event：

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule.

3. Click Recurrence on the navigation list and choose a run option on the Run object list.

4. Complete the schedule parameters for your object (start date, end date, and so on).

5. Select from the list of Available Schedule Events and click > to add the events(s) to the list of

Events to trigger on completion.

6. Click the Schedule button to schedule the object.

1. select a server for your scheduling job

1. In the "Folders" management area of the CMC, select an object.

2. Click Actions > Schedule.

3. Click Recurrence on the navigation list and choose a run option on the Run object list.

4. Complete the schedule parameters for your object (start date, end date, and so on).

5. Select from the list of Available Schedule Events and click > to add the events(s) to the list of

Events to trigger on completion.

6. Click the Schedule button to schedule the object.

If you want to select a server for your scheduling job：

1. In the "Folders" management area of the CMC, select the object you want to schedule.

2. Click Actions > Schedule.

3. On the navigation list, click Scheduling Server Group.

4. Select the appropriate option:

• Choose Use the first available server to run the object as quickly as possible, regardless of

server groups.

• Choose Give preference to servers belonging to selected group if you would like to use a

specific server group over another in the event that both are available.

• Choose Only use servers belonging to the selected group to ensure that the job runs on the

specified server group.

5. Select or deselect Run at origin site to run the object where it is located.

6. Set the rest of your scheduling options and click Schedule.

If you want to select languages for report instances：

1. In the "Folders" management area of the CMC, select the object you want to schedule.

2. Click Actions > Schedule.

3. On the navigation list, click Languages.

4. Select one of the following language options:

• Schedule the report in Preferred Viewing Locale

This option schedules the report according to the preferred viewing locale you set in your

preferences, and creates instances using that locale only.

• Schedule the report in Multiple Locales

This options schedules the report in multiple languages. If you choose this option, you must also

select locales by moving them from the All Locales list to the Selected Instance Locales list.

5. Set other scheduling parameters as required, and click Schedule.

1. Instance Manager

If you want to manage instances for an object：

1. In the "Folders" management area of CMC, select an object.

2. Click Actions > History.

3. Select an instance or instances.

4. Click either Run Now, Pause, Resume, Send to, Reschedule, or Delete.

If you click Run Now, the system schedules the object to be run immediately. The scheduled job

will have a status of Pending.

If you want to view an instance

1. Select an object in the "Folders" management area of CMC.

2. Click Actions > History.

3. In the Instance Time column, click the instance you want to view.

You can also use the "Instance Manager" to view a list of instances by status or by user.

1. Calendars

If you want to create a calendar

1. Go to the "Calendars" management area of the CMC.

2. Click Manage > New > New Calendar.

3. Type a name and description for the new calendar.

4. Click OK.

If you want to add dates to a calendar

1. Go to the "Calendars" management area of CMC.

2. Select the calendar you want to change.

3. Click Actions > Select Dates.

4. Choose a calendar format option (Yearly, Quarterly, or Monthly); alternatively, if you want to create

a calendar with recurring dates, click By day of month or By day of week.

5. Click the days of the month that you want to include as run days for the calendar.

To remove a run day, click the day again.

6. When you are finished, click Save.

If you want to delete a calendar

1. Go to the "Calendars" management area of the CMC.

2. Select the calendar you want to delete.

3. Click Manage > Delete.

4. Click OK to confirm.

1. File-based events

If you want to create a file-based event

1. Go to the "Events" management area of the CMC and open the System Events folder.

File-based events are stored and managed in System Events.

2. Click Manage > New > New Event.

3. In the Type list, select File.

4. Type a name for the event in Event Name.

5. Type a description in Description.

6. In the Server list, select the Event Server that will monitor the specified file.

7. Type a file name in Filename.

8. To enable Alerting for the event, select Alerting Enabled and type a message in Alert Message.

When the event is triggered, the message you enter is included in the alert notification sent to users.

9. Click OK.

If you want to create a schedule-based event

1. Go to the "Events" management area of CMC and open the System Events folder.

Schedule-based events are stored and managed in System Events.

2. Click Manage > New > New Event.

The "New Event" dialog box appears.

3. In the Type list, select Schedule.

4. Type an event name in Event Name.

5. Complete the Description field.

6. Select an event status option.

7. To enable Alerting for the event, select Alerting Enabled.

When the event is triggered, an alert notification is sent to users.

8. Click OK.

If you want to create a custom event

1. Go to the "Events" management area of the CMC and open the Custom Events folder.

2. Click Manage > New > New Event.

3. Type a name for the event in the Event Name field.

4. Complete the Description field.

5. If you want to enable Alerting for the event, select Alerting Enabled and enter a message in the

Alert Message field.

When the event is triggered, the message you enter is included in the alert notification sent to users.

6. Click OK.

If you want to trigger a custom event

1. Go to the "Events" management area of CMC and open the Custom Events folder.

2. Select a custom event.

3. Click Actions > Trigger Event.

1. Working with Alerting

If you want to enable Alerting for an event

1. In the "Events" area of the CMC, select the event for which you want to enable Alerting.

2. Click Manage > Properties.

The "Properties" dialog box appears.

3. Click Event Settings on the navigation pane.

4. Select Alerting Enabled and enter a message in the Alert Message field.

This message will be sent to subscribers when the alert is triggered.

5. Click Save & Close.

If you want to subscribe to an alert

1. Navigate to the alert source and select it.

2. Click Actions > Subscribe.

The "Subscribe" dialog box appears.

3. Select your destination.

4. Configure other settings as required.

Depending on the alert source, you may have to configure additional settings. For example, for

Crystal reports that contain multiple alerts, you must select which alert to subscribe to.

5. Click Save & Close.

If you want to unsubscribe from an alert

1. Navigate to the alert source and select it.

2. Click Actions > Unsubscribe.

3. When prompted for confirmation, click Unsubscribe.

If you want to subscribe other users to an alert

1. Navigate to the alert source and select it.

2. Click Actions > Manage Subscribers.

The "Manage Subscribers" dialog box appears.

3. Ensure Subscriber List is selected on the navigation pane.

4. If you want to add new subscribers, do the following:

a. Click Add.

b. In the "Add" dialog box, move users and groups from the Available list to the Subscribed list,

and click Add Default Subscription(s).

c. Configure other Alerting settings as required.

For example, you can modify which alerts to subscribe to (if the alert source contains multiple

alerts) and the destinations. Depending on the alert source, other settings may be available.

d. Click Save & Close.

5. If you want to edit settings for a subscriber, do the following:

a. Select a subscriber on the "Subscriber List" and click Edit.The "Edit Subscriptions" dialog box appears.

b. If you want to edit which alerts the subscriber will receive, click Alerts on the navigation list and select the relevant alerts. If the alert source contains multiple alerts, they are all listed here; otherwise only one alert appears.

c. If you want to edit which destinations an alert will be sent to, click Destinations on the navigation list and select the relevant destinations. If the email destination has been enabled and configured on the Adaptive Job Server, it will be available; otherwise, only My Alerts is available.

d. Configure other alerting settings as required. Depending on the alert source, you may have to configure additional settings.

e. Click Save & Close to return to the Subscriber List.

6. After you have made all your changes, in the "Manage Subscribers" dialog box, click Save & Close.

If you want to unsubscribe others from an alert

1. Navigate to the alert source and select it.

2. Click Actions > Manage Subscribers.

The "Manage Subscribers" dialog box appears.

3. Ensure Subscriber List is selected on the navigation pane.

4. Select a user or group and click Unsubscribe.

If you want to exclude users from an alert

1. Navigate to the alert source.

2. Click Actions > Manage Subscribers.

The "Manage Subscribers" dialog box appears.

3. Ensure Excluded List is selected on the navigation pane.

4. Move users and groups from the Available list to the Excluded list.

5. Click Save & Close.

If you want to manage Alerting settings for an alert source

1. Navigate to the alert source.

2. Click Actions > Manage Alerting Settings.

The "Manage Alerting Settings" dialog box appears.

3. To enable BI launch pad as a destination, select Enable My Alerts.

4. To enable email as a destination, select Enable Email, and then choose whether to use default or

custom email settings.

5. Click Save & Close.

1. How profiles work

If you want to profiles and the Publishing workflow

1. Create a profile.

2. Add users and groups to the profile.

3. Assign profile values to each user and group for that profile.

4. Specify a global profile target if necessary.

When you create the publication, you perform these tasks:

1. Add users and groups as recipients.

2. Specify a local profile target for the profile to filter (for example, a field in a Crystal report).

3. Specify the profile(s) to use for personalization.

If you want to create a profile

1. Go to the "Profiles" management area of the CMC.

2. Click Manage > New > New Profile.

The "Create New Profiles" dialog box appears.

3. Type a name for the profile in the Title field.

4. Complete the Description field.

5. Click OK.

1. Profile targets and profile values

If you want to specify a global profile target

1. In the "Profiles" area of the CMC, select the profile that you want to specify a profile target for.

2. Click Actions > Profile Targets.

The "Profile Targets" dialog box appears.

3. Click Add.

4. Select a universe from the Universe Name list.

5. Enter a class name in the Class Name field, or click Select object from the universe.

6. Enter a variable name in the Variable Name field, or click Select object from the universe.

7. Click OK.

If you want to specify a profile value

1. In the "Profiles" area of the CMC, select a profile.

2. Click Actions > Profile Values.

The "Profile Values" dialog box appears.

3. Click Add.

4. Click Choose.

5. Select a user or group or multiple users or groups, and click > to move them into the list on the right

side.

6. Click OK.

7. Enter a profile value for the selected user or group or multiple users or groups.

You can use several different types of profile values. You can enter a static profile value or an

expression. You can also specify variable profile values for third-party users and groups mapped to

the system.

• If you want to use a value:

a. Click Value.

b. Enter a value in the New Value field.

c. Click Add.

If you want to use a filter expression:

a. Click Filter Expression.

b. Depending on the type of expression you want to use, enter an expression in the Web

Intelligence formula expression field or the Crystal reports expression field.

8. Click OK.

If you want to use variables as profile values

1. In the "Profiles" area of CMC, select the profile that you want to add the user or group to.

2. Click Actions > Profile Values.

The "Profile Values" dialog box appears.

3. Click Add.

4. Click Choose.

5. Select the user or group from the list on the left, and click > to move the user or group to the list on

the right.

6. Click OK.

7. Click Value.

8. Select a placeholder variable from the Add placeholder list, and click Add.

9. Click OK.

1. Designing publications

If you want to create a new publication in the CMC

1. Go to the Folders area of the CMC.

2. In the "Group Tree", browse for the folder in which you want to create the publication.

3. Select the folder so that its contents appear in the "Details" panel.

4. Click Manage > New > Publication.

The "New Publication" dialog box appears.

If you want to create a new publication in BI launch pad

1. In BI launch pad, on the "Documents" tab, expand the Folders drawer, and locate and select the

folder in which to create the publication. The folder contents appear in the list panel.

2. Select New > Publication.

The "New Publication" dialog box appears.

If you want to open an existing publication

1. Select the publication.

• If you are in BI launch pad, on the Documents tab, expand the Folders drawer and browse for

the publication.

• If you are in the CMC, go to the Folders area and browse for the publication.

2. Open the publication's properties.

• If you are in BI launch pad, select the publication and click View > Properties.

• If you are in the CMC, select the publication and click Manage > Properties.

If you want to enter general properties for a new publication

1. Click General Properties.

2. In the Title field, enter a title for the publication.

3. In the Description field, enter a description for the publication.

4. In the Keywords field, enter keywords that are associated with the publication's content.

If you want to select source documents

1. Click Source Documents.

2. Click Add.

The "Select Source Documents" dialog box appears.

3. Browse for the source documents you want to include and select them.

4. Click OK.

5. Select or clear the Refresh At Runtime check boxes that are next to the source documents.

If you want to replace static source documents

1. Right-click a static source document and select Organize > Replace File.

2. In the "Replace File" dialog box, click Browse, and select a more recent version of the source

document file on your computer.

3. Click Replace.

4. In the confirmation message, click OK to update the source document.

If you want to select Enterprise recipients

1. Click Enterprise Recipients.

2. In the "Available" area, browse for the users or groups that you want to include or exclude as

recipients.

a. Click User List to display a list of all users in BI platform, or click Group List to display a list of

all groups.

b. Select the users and groups.

3. If you want to include the recipients you selected, move them to the Selected list.

4. If you want to exclude the recipients you selected, move them to the Excluded list.

If you want to specify dynamic recipients

1. Click Dynamic Recipients.

2. On the Choose the source for the dynamic recipients list, choose the format of the dynamic

recipient source.

3. In the right-hand pane, browse for the object you want to use as a dynamic recipient source, select

it, and click OK.

4. If you chose to use a Web Intelligence document as a dynamic recipient source, on the Select the

Data source name for the document list, select a query that appears in the document.

5. On the Recipient Identifier list, select a field that contains the recipient identity values.

6. If necessary, on the Full Name list, select a field that contains the full names of recipients.

7. If you intend to deliver the publication to email addresses, on the Email list, select a field that contains

the recipient email addresses.

8. Decide whether you want to distribute the publication to all dynamic recipients listed by the dynamic

recipient source.

• If you want to distribute the publication to all dynamic recipients, ensure Use entire list is selected.

• If you want to include or exclude some dynamic recipients:

a. Clear Use entire list.

b. On the Available list, select the check boxes next to the recipients you want to include or

exclude.

c. If you want to include the recipients you selected, move them to the Selected list.

d. If you want to exclude the recipients you selected, move them to the Excluded list.

If you want to specify a destination for the publication

1. Click Destinations.

2. Under Select Destinations, choose a destination check box.

3. To avoid keeping publication instances on your system, do not select Default Enterprise location.

4. Choose a destination in the Show options for selected destinations list.

Additional configuration options for the destination appear.

5. As an option, specify a name for your publication by choosing Use Specific Name. (By default, a

system-generated name will be assigned to the publication unless you choose this option.) Enter a

name or select from a list of placeholders in the Add placeholder list.

A placeholder is a container for variable data. At run time, the value is inserted into the placeholder.

6. If your publication contains multiple documents, you can specify a name for each one by choosing

Specific Name per Document.

7. If you are sending a publication to the default Enterprise location and to recipient email addresses,

you can embed a link to the Enterprise location in the email body.

If you want to embed content from a dynamic content source document in an email

1. Click Formats.

The "Formats" section appears.

2. Select the dynamic content document that you want to embed in the email.

* Crystal report： On the Title list, select the report.
* Web Intelligence document： On the Document list, select the document.

3. Select mHTML as a publication format for the dynamic content document that you selected.

* Crystal report ：On the Format Options list, select the mHTML checkbox.

Web Intelligence document： On the Output Format list, select the mHTML checkbox.

4. For Web Intelligence documents, choose whether to publish the entire document or one report tab

in the document.

a. Ensure mHTML is selected on the Output Format list.

b. If you want to publish the entire document, leave All reports selected; if you want to publish a

single report tab, click Select one report and choose a report tab on the list.

5. On the navigation list, click Destinations. The "Destinations" section appears.

6. In the "Select Destinations" area, select Email.

7. On the Show options for list, click Email.

Additional configuration options for the email destination option appear.

8. In the From box, type a name or email address or choose Email from the Add placeholder list. For example, you can type Robert, Publisher, or publisher@sap.com. If you type a name, it will be appended to your email server (for example, Publisher@emailserver).

9. Type a subject in the Subject box. To insert a placeholder, choose an option such as Title from the Add placeholder list. If you personalized the report, personalized placeholders are available in the the Add placeholder list.

10. Type any message text you want the body of the mail to contain in the Message box.

11. To embed dynamic content into the Message box, position the cursor in the Message box where you want to embed the document content, go to the Add placeholder list under the Message box and choose Report HTML Content.

12. If your publication contains other source documents, ensure Add Attachment is selected and the

attachment options are configured properly.

1. Design tasks for Crystal reports publications

If you want to personalize a Crystal report using parameter values

1. Click Personalization.

2. In the "Parameters" area, ensure the default values for the listed parameters are correct.

If you want to change a default value, click the Edit Values button that is next to the parameter

value. Select or enter the parameter value, and click OK.

3. If you want to override the default parameter personalization with Enterprise recipients' profile values,

choose a profile from the list in the Enterprise Recipient Mapping column.

4. If you want to override the default parameter personalization with dynamic recipients' personalization

values, choose a dynamic recipient source column from the list in the Dynamic Recipient Mapping

column.

If you want to personalize a Crystal report by filtering fields

1. Click Personalization.

2. In the "Filters" area, choose a Crystal report field from the list in the Report Field column.

The list of available fields includes all database fields and recurring formulas in the main report or

non-on-demand subreports.

3. Choose a profile from the list in the Enterprise Recipient Mapping column.

4. Choose a dynamic recipient source column from the list in the Dynamic Recipient Mapping column.

This setting maps the report field to a column in the dynamic recipient source that contains

corresponding values.

5. Repeat steps 2 to 4 for every report field that you want to filter.

If you want to specify formats for a Crystal report

1. Click Formats.

2. On the Documents list, select a Crystal report.

The "Format Options" area appears and lets you select the publication formats for the Crystal report

you selected.

3. On the Format Options list, select the check boxes next to the formats you want.

The formats are selected.

4. On the Format Options list, click the name of a format you selected.

5. If you want to use the default export options defined in the source document, leave Use the export

options defined in the report selected; otherwise, clear Use the export options defined in the

report

6. Enter additional information to customize the appearance of the format you chose.

7. Repeat steps 4 to 6 for each format in which you want to publish the Crystal report. After you finish, you must repeat steps 2 to 7 for each Crystal report in the publication.

1. Design tasks for Web Intelligence document publications

If you want to specify formats for an Web Intelligence document

1. Click Formats.

2. On the Document list, select a document.

3. On the Output Format list, select the check boxes for the format or formats in which you want to

publish the document.

4. With the format option highlighted on the Output Format list, in the "Output Format Details" area,

choose whether to publish the entire document or one report tab in the document.

• If you want to publish the entire document, leave All reports selected.

• If you want to publish a single report tab, click Select one report and choose a report tab on the

list.

5. Repeat step 4 for every format in which you want to publish the document.

If you want to personalize an Web Intelligence document using a global profile Target

1. Click Personalization.

2. In the Global Profiles area of the "Personalization" dialog box, select a profile from the list in the

Enterprise Recipient Mapping column.

This profile maps the document to the universe field (the global profile target) that is filtered for

Enterprise recipients.

If you want to personalize a Web Intelligence document by filtering fields

1. On the navigation list, click Personalization.

2. In the "Local Profiles" area, choose a field from the list in the Report Field column.

3. Choose a profile from the list in the Enterprise Recipient Mapping column.

This setting maps the report field to the profile values that are defined for Enterprise recipients.

If this profile is not configured in BI platform, personalization will fail. If you need profiles added to

BI platform, contact your system administrator.

4. Choose a dynamic recipient source column from the list in the Dynamic Recipient Mapping column.

This setting maps the field in the source document to a column in the dynamic recipient source that

contains corresponding values.

5. Repeat steps 2 to 4 for every field that you want to filter.

1. Additional publication features for Crystal report publications

If you plan to use the default printer, ensure that the printer is installed and configured properly.

1. Expand Additional Options and click Print Settings.

2. On the Documents list, select a Crystal report that you want to print when the publication is run.

3. Select Print Crystal reports when scheduling.

4. Leave Default printer selected if you want to print to the job server's default printer; otherwise,

select Specify a printer.

5. Enter a printer's path and name.

• If your job server is on Windows, in the Specify a printer box, type \\printserver\printername

Replace printserver with the name of your printer server and printername with the name

of your printer.

• If the job server runs on Unix, confirm that the Unix is shown (not hidden), and type the print

command that you usually use in the Specify a printer box.

For example, type lp -d printername

6. Select the number of copies and choose the print page range.

7. Set the collation and page scaling options.

8. If you want to center report content on the page, select Center the page.

9. If the Crystal report is wide and you want it to fit on one page when it prints, select Fit horizontal

pages into one page.

Recipient delivery rules determine whether a publication is delivered to a particular recipient after

processing and personalization.

1. Expand Additional Options and click Delivery Rules.

2. In the "Recipient Delivery Rule" area, click Deliver individual document when condition is met

or Deliver all documents only when all conditions are met.

3. On the list next to each report, specify a condition that must be met for the publication to be delivered.

The default delivery rule settings are summarized in the following table. If a report contains alerts,

options that are based on alert values are also available.

If you want to set a global delivery rule on a Crystal report

1. Expand Additional Options and click Delivery Rules.

2. In the "Global Delivery Rule" area, click Browse.

A dialog box appears and lets you select the Crystal report on which the global delivery rule will be

set.

3. Browse for the Crystal report, select it, and click OK.

The dialog box closes.

4. On the Condition list, select the alert value that the report must have for the global delivery rule to

be met.

If you want to format the merged PDF

1. Expand Additional Options and click Merged PDF Options.

2. Create and format a table of contents for the merged PDF file:

a. Select Create Table of Contents. The format options for the table of contents are available.

b. In the Title box, enter a title for the table of contents.

c. Format the font, font size (in points), and font color that the title and the items in the table of contents will have.

3. Set the page number format options for the merged PDF file:

a. Select Apply Running Page Numbers.

The format options for page numbers are available.

b. In the Number Format box, enter the format in which you want the page numbers to appear.

By default, the format is set to Page &p of &P. You can change this format, but you must use &p

as a placeholder for the current page number and &P as a placeholder for the total number of

pages.

c. On the Number Location list, choose the page number orientation for the merged PDF file.

d. Format the font, font size (in points), and font color that the page numbers will have.

e. If you want the table of contents to have page numbers, select Apply page numbers to Table

of Contents pages.

4. Set recipient logon credentials and permissions for recipient actions:

a. In the User Password box, enter a password that recipients must enter to view the merged PDF

file.

b. In the Owner Password box, enter a password that recipients must enter to edit the merged

PDF file.

c. Select or clear the following check boxes to set permissions for user actions:

If you want to configure database logon information for a Crystal report

1. Expand Additional Options and click Database Logon.

2. On the Title list, select a Crystal report .

The database information for that Crystal report appears below the Title list.

3. Ensure the information that appears in the Database Server and Database boxes is correct.

4. In the User box, type a user name that recipients must use to log on.

5. In the Password box, type a password.

1. Additional publication features for Web Intelligence document publications

To change the prompt value for a Web Intelligence document

1. Expand Additional Options and click Prompts.

2. Click Modify.

The "Prompts" dialog box appears.

3. Click Refresh Values.

A list of possible prompt values appears in the list on the left.

4. Move the prompt value or values from the list on the left to the list on the right.

5. Click Apply.

The "Prompts" dialog box closes, and the list of prompt values is updated.

If you want to specify publication extensions

1. Expand Additional Options and click Publication Extension.

2. In the Publication Extension Name field, enter the name of the extension.

3. In the Class Name field, enter the fully qualified class name for the extension.

4. If necessary, enter a parameter in the Parameter field.

5. If you want the extension to be used after processing but before delivery, click the Add button above

Before Publication Delivery. The extension is added to the Before Publication Delivery list.

6. If you want the extension to be used after delivery, click the Add button above After Publication

Delivery. The extension is added to the After Publication Delivery list.

7. Repeat steps 2 to 6 for each extension that you want to add.

If you want to configure email notification for successful or failed publication jobs

1. Expand Additional Options and click Notification.

2. Expand Email Notification: Not in use.

3. If you want to receive email notification for successful publication jobs, select A job has been run

successfully and configure the options that appear below.

• Click Use the Job Server's defaults if you want to use the Adaptive Job Server defaults.

• Click Set the values to be used here if you want to use your own settings and enter your settings in the appropriate fields.

• In the From field, enter an email address or a name.

• In the To field, enter an email address to which the email will be sent.

• In the Cc field, enter email addresses for any users whom you want to receive email notification.

• In the Subject field, enter a subject line for the email.

• In the Message field, enter a message that will accompany the notification email.

4. If you want to receive email notification for failed publication jobs, select A job has failed to run and configure the options that appear below.

• Click Use the Job Server's defaults if you want to use the Adaptive Job Server defaults.

• Click Set the values to be used here if you want to use your own settings and enter your settings in the appropriate fields.

• In the From field, enter an email address or a name.

• In the To field, enter an email address that the email will be sent to.

• In the Cc field, enter email addresses for any users whom you want to receive email notification.

• In the Subject field, enter a subject line for the email.

• In the Message field, enter a message that will accompany the notification email.

If you want to enable auditing notification for publication jobs

1. Expand Additional Options and click Notification.

2. Expand Audit Notification: Not in use.

3. If you want to audit successful publication jobs, select A job has been run successfully.

4. If you want to audit failed publication jobs, select A job has failed to run.

If you want to specify events

1. Expand Additional Options and click Events.

2. If you want to specify file-based and custom events for your publication, move them from the Available Events list to the Events to wait for list. These events trigger the publication job to run.

3. If you want to specify schedule events for your publication, move them from the Available Schedule Events list to the Events to trigger on completion list. These events occur after the publication job has run.

If you want to set a server group option

1. Expand Additional Options and click Scheduling Server Group.

2. Choose a server group option.

If you want to specify a profile resolution method

1. Expand Additional Options and click Advanced.

2. Under Profile Resolution Method, click Merge or Do not merge.

If you want to specify a report bursting method

1. Expand Additional Options and click Advanced.

2. Click one of the options under Report Bursting Method.

1. Post-design publication tasks

If you want to test a publication

1. Click Test Mode.

2. If necessary, modify the list of Enterprise recipients.

a. Click Enterprise Recipients.

b. Under "Email Recipients", in the To field, enter your own email address.

c. Move users or groups from the Available list to the Selected list or Excluded list.

3. If necessary, modify the list of dynamic recipients.

a. Click Dynamic Recipients.

b. Under "Email Recipients", in the To field, enter your own email address. This field only appears if your publication is intended for an email destination. BI platform sends all email publication instances generated during test mode to the email address you specify here.

c. Ensure the columns that are mapped to recipient IDs, full names, and email address are correct.

d. Select or clear Use entire list.

e. If Use entire list is cleared, move the users or groups that you want to include or exclude from the Available list to the Selected list or Excluded list.

4. Click Test.

The publication is run in test mode.

If you want to subscribe to or unsubscribe from a publication

1. Browse for the publication and select it.

2. Subscribe to or unsubscribe from the publication by doing one of the following:

• If you are in the CMC, click Actions > Subscribe or Actions > Unsubscribe.

• If you are in BI launch pad, click More Actions > Subscribe or More Actions > Unsubscribe.

If you want to schedule a publication to run

1. Close the publication design page.

2. Select the publication.

3. Select Actions > Schedule in the CMC or More Actions > Schedule in BI launch pad.

4. Ensure that the recurrence information is correct.

5. Click Schedule.

If you want to redistribute a publication instance

1. Browse for the publication and select it.

2. Click Actions > History if you are in the CMC, or More Actions > History if you are in BI launch pad. The history of the publication is displayed.

3. Select a successful publication instance.

4. Click Actions > Redistribute if you are in the CMC, or More Actions > Redistribute if you are in

BI launch pad.

5. Choose the recipients who will receive redistributed instances.

6. Click Redistribute.

If you want to retry a failed publication

1. Select the publication that has the failed publication instance.

2. Click Actions > History if you are in the CMC, or More Actions > History if you are in BI launch

pad.

The publication history is displayed.

3. Select the failed publication instance.

4. Click Actions > Retry if you are in the CMC, or More Actions > Retry if you are in BI launch pad.

The instance status changes to Running.

1. Setting Live Office Options

If you want to set General options

1. Open the Microsoft Office application.

2. Click Live Office > Application Options.

3. In the Options dialog box, click the General tab and set the following options:

If you want to set View options

1. Open the Microsoft Office application.

2. Click Live Office > Application Options.

3. In the Options dialog box, click the View tab and set the following options:

If you want to set Business Intelligence platform options

1. Open the Microsoft Office product you want to set the Live Office options for.

2. Click Live Office > Options.

3. In the Options dialog box, click the BI platform tab and set the following options:

* Use specified logon criteria：Select this option to allow automatic sign in to the specified location.
* Username：Type the username to be used for logging on to the repository.
* Password： Type the password to use for logging on to the repository.Web Services URL：Type the web address for the web services server that will access the repository. Use the following format: <http://localhost:port/webappname/services> Where localhost is the system name, port is the port number, and webappname is the name of the web application as configured for the web service.
* System ：Type the name of the system or local host.
* Authentication：The authentication method used by the web service. When the Web Services URL is entered, the options available on the specified server are added to the list.

If you want to set Panel options

1. Open the Microsoft Office product you want to set the Live Office options for.

2. Click Live Office > Application Options.

3. In the Options dialog box, click the Panel tab and set the following options:

* Association: Remove associations older than this number of days：Enter the number of days that associations between objects and messages should be retained. Click Remove to delete associations older than the specified number of days.
* Search: Display this number of search results on each page：Sets the number of items that will appear in a single page of the search results panel.
* Notification：If the Live Office Panel is closed when you select an email message, Live Office can notify you if the message contains inserted, associated, or suggested objects. Depending on where in Outlook you select the message, Live Office can open the Live Office Panel or display a Desktop Alert. To enable notifications, select one or both of the following options:

• In the email message window, open Live Office

Panel

• In the message list and Reading Pane, display a Desktop Alert

* Import user data into Live Office Panel：If you previously exported your Live Office data including favorites and associations, you can import it into the Live Office Panel.
* Export user data from Live Office Panel：You can export your Live Office user data including favorites and associations as a back up. If you need to reinstall or revert your data to an earlier version, you can import the exported user data using the Import button.

1. Inserting Crystal Reports content

If you want to start the Live Office Insert Wizard

1. Open a Microsoft Office document and place your cursor where you want to insert the Live Office

object.

1. Click Live Office > >
2. Click Insert
3. Click Crystal Reports content.

If you want to locate documents in the repository

1. On the Insert Wizard "Choose Document" page, do any of the following to navigate to the file you want use:

• To change the tree view to a list of folders, click the Folder button ( ).

• To change the tree view to a list of categories, click the Category button ( ).

• To view reports contained within a publication, in the folder list, double-click the publication instance.

• To update the list of objects available from the repository, click the Refresh button ( ).

• To search for a specific report, in the toolbar, enter the field you want to search in the Search

box, enter the term you want to search for in the Search box, and click the "Search" button.

• To sort the list of available reports in the search results, click the column heading you want to

sort on.

• To view a list of suggested reports in Microsoft Outlook, expand the Suggested folder.

• To find a report you recently created or modified in Live Office, expand the "Recent" folder.

2. Select a report and click Next.

If the selected report contains parameters, the "Specify Parameter Values" page opens. Otherwise, the

"Choose Data" page opens.

If you want to specify parameter values

1. On the "Specify Parameter Values" page, for each defined parameter, select the parameter value

from the corresponding list.

2. Click Next.

1. Insert Wizard: Choose Data

If you want to select Parts as your data set

1. Choose your preferred options for viewing report data:

* Click the Toggle Interactive Parameters button to adjust the parameter values in the Interactive Parameters pane. Use the drop down list under each parameter in the pane to adjust the value. After you have completed your parameter value selections click Apply.

•Click the Toggle Group Tree button to switch document view. For example, in a quarterly sales report, data could be grouped and sorted by sales person and product in document tree view for quick access.

• Click the right or left facing arrows in the toolbar to navigate to a particular page in a report.

• Click the Search icon to search text strings in the report such as a sales person's name.

• Choose a page magnification or zoom factor for the report from the available drop-down list for optimal display.

2. On the Choose Data page, if the Fields view is selected, click the Switch to Parts button.

3. In "document viewer", select the report parts or objects you want to include.

For example, for a quarterly sales report, you could include the name of the sales person, their

product class, and their sales total by quarter.

4. When you are finished defining the report data, click Next. The "Summary" page opens.

If you want to select Fields as your data set

1. On the "Choose Data" page, if the Parts view is selected, click the Switch to Fields button.

2. In the "Available Fields" list, click a field that you want to include in the Report object, and then click the right arrow (>) to move it to the "Selected Fields" list.

3. Use the up and down arrows to the right of the "Available Fields "list to change the order of the included fields, as required.

4. Click Next.

If you want to filter the data

1. On the Set Filters page, select the field that you want to filter.

2. Select a suitable operator from the Operators list on the right.

There are many different types of operators that you can choose. You can further qualify your

operator with values from the Value lists. The options that you are presented with depend on the

selected operator.

3. Select a value from the list of values for the operator you chose, and click Add Filter.

The filter and applicable value appear under the field to which they apply. The filter is stored as a

comment or bookmark on the field that contains the filter.

4. Click Next.