BusinessObjects XI R2 Product Documentation Roadmap

BusinessObjects XI R2

Windows and UNIX

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Overview

You want to find specific information somewhere within the thousands of pages that comprise Business Objects documentation, but where should you even begin to look?

This roadmap provides you with starting points for approaching your Business Objects documentation so that you can quickly find out how to install, configure, and use your specific BusinessObjects solution.

The roadmap is divided into the following major categories, loosely based on typical stages in the deployment and use of BusinessObjects:

- Building and managing your data warehouse
- Preparing for BusinessObjects XI R2 installation
- Upgrading and managing your business intelligence life cycle
- Installing BusinessObjects XI R2 and additional component products
- Completing post-installation deployment
- Scaling, tuning, and administering your deployment
- Using BusinessObjects XI R2 products
- Customizing your solution
- Troubleshooting your solution

Each category contains a list of topics about which users typically ask questions. For example, you may want to find out about deployment procedure, security, migrating a repository to a newer version, or getting your users started. Under each topic, a table provides at least one specific place (and often several) where you can find the information.

Tip: If you want to find documentation for a specific product quickly, search for the product name in the Index at the end of this roadmap.

Where can you find each document or guide?

The right-hand column in the roadmap tables displays the format in which you can obtain each guide, document, or code sample, as explained here:

Abbreviation	Meaning	Description
ICD	Installation CD-ROM	Available from the BusinessObjects XI R2 installation CD. **Note:** ICD followed by an asterisk (*) means the installation CD for a specific Business Objects product is separate from the BusinessObjects XI R2 installation CD.
RCD	Resource CD-ROM	Available from the BusinessObjects XI R2 resource CD.
DL	Developer Library	Available from the BusinessObjects Enterprise installation CD at: `<$install_dir>\Help\Developer_Help\en\` and from the Developer Zone web site at www.businessobjects.com/products/dev_zone/.
W	Web site	Available from the Business Objects Customer Support web site at: http://support.businessobjects.com/documentation. **Note:** W followed by an asterisk (W*) means that the documentation for a specific product is available with the online download of the software from the Business Objects Customer Support web site at: www.support.businessobjects.com.

How to use the documentation roadmap tables

The following tables list key Business Objects documentation available to help you with each stage in deploying and using BusinessObjects XI R2 and other component products.

Note: This roadmap is *not* an exhaustive list of the documentation available for BusinessObjects XI R2. You can find the full set of documentation categorized by administration task or product name at: http://support.businessobjects.com/documentation.

Building and managing your data warehouse

Meet installation pre-requisites and avoid critical issues

Task	Information	Documentation	Check
Understand key issues *before* installation	Limitations and issues in this release, with workaround solutions when possible	*Release Notes*	ICD*, W
See the new features available with this release	The new Data Integrator features introduced with this release	*Release Summary*	ICD*, W

Install Data Integrator and build a new data warehouse

Task	Information	Documentation	Check
Understand architecture, install, configure, and start Data Integrator	• Architecture overview • Pre-installation information • Installation procedures (Windows and UNIX)	*Data Integrator Getting Started guide*	ICD*, W
Use Data Integrator for the first time	• Step-by-step introduction to core features	*Data Integrator Core Tutorial*	ICD*, W
Build a new data warehouse	• Graphical interface overview • All you need to build a data warehouse including how to: build projects and jobs, define a database datastore, define data flows, use data cleansing transforms	*Data Integrator Designer Guide*	ICD*, W

Note: ICD followed by an asterisk (ICD*) means that the installation CD for a specific product is separate from the BusinessObjects XI R2 installation CD.

Maximize performance and implement life-cycle management

Task	Information	Documentation	Check
Administer your data warehouse	• Manage the smooth-running of your data warehouse • Monitor adapters • Track statistics	*Data Integrator Administrator Guide*	ICD*, W
Understand conceptual information, object usage specifics, and use power features	• Detailed explanation of concepts • Functions, transforms • Objects, schemas	*Data Integrator Reference Guide*	ICD*, W
Optimize performance	• Advanced performance tuning information • Guidelines and options for parallel processing and bulk loading	*Data Integrator Performance Optimization Guide*	ICD*, W
Build a more powerful system and manage the life cycle of your data warehouse	• Multi-user capabilities • Build central repository • Migrate from development to test to production environment	*Data Integrator Advanced Development and Migration Guide*	ICD*, W

Integrate Data Integrator with other applications

Task	Information	Documentation	Check
Integrate with third-party enterprise applications	SAP R/3, and SAP BW	*Supplement for SAP*	ICD*, W
	Oracle Applications	*Supplement for Oracle Applications*	ICD*, W
	J.D. Edwards World and J.D. Edwards OneWorld	*Supplement for J.D. Edwards*	ICD*, W
	Siebel	*Supplement for Siebel*	ICD*, W

Task	Information	Documentation	Check
Integrate with Crystal Reports	Configure and use the Crystal Enterprise Adaptor to create data flows and a BusinessObjects universe	*Data Mart Accelerator for Crystal Reports*	ICD*, W
Create your own adaptor using the SDK	Create adaptors that integrate Data Integrator with information sources	*Adaptor Software Developer's Kit User's Guide*	ICD*, W

Note: ICD followed by an asterisk (ICD*) means that the installation CD for a specific product is separate from the BusinessObjects XI R2 installation CD.

Preparing for BusinessObjects XI R2 installation

Gain an understanding of BusinessObjects Enterprise and plan your deployment

Task	Information	Documentation	Check
Find out how the BusinessObjects Enterprise system works	• The architecture • The administration components and processes	*BusinessObjects Enterprise XI R2 Administrator's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI R2 Administrator's Guide (PDF format)	W, RCD
See the new features available with this release	• The new BusinessObjects Enterprise features introduced with this release	*What's New in this Release?*	W
See the new features available in Crystal Reports with this release	• The new Crystal Reports features introduced with this release	*What's New in Crystal Reports XI R2*	W

Task	Information	Documentation	Check
Plan the design of your deployment	• System requirements • Set up server communication • Choose server location • Choose your system database • Choose a development environment (if necessary) and choose a web application server – IIS (ASP) or JAVA (JSP) • Choose a Web Component Adaptor	*BusinessObjects Enterprise XI R2 Installation Guide*	W
Plan a firewall	• Firewall types • Server communication and integrating the firewall • Firewall configuration overview	*BusinessObjects Enterprise XI R2 Administrator's Guide* (HTML format)	RCD
		BusinessObjects Enterprise XI R2 Administrator's Guide (PDF format)	W
Set up the CMS target database **Note:** This is not necessary if you are installing a new CMS on the SQL Server installed by default.	• Setup for unicode • Define the security and password of the repository	*BusinessObjects Enterprise XI R2 Installation Guide*	W

Meet installation pre-requisites and avoid critical issues

Task	Information	Documentation	Check
Understand key issues *before* installation	Limitations and issues in this release, with workaround solutions when possible	*BusinessObjects XI R2 Release notes*	ICD, W
		Crystal Reports Release Notes	ICD*
		Process Tracker Release Notes	W
		Intelligent Question Release Notes	ICD*

Note: ICD followed by an asterisk (ICD*) means that the installation CD for a specific product is separate from the BusinessObjects XI R2 installation CD.

Upgrading and managing your business intelligence life cycle

Migrate the repository from a previous version

Task	Information	Documentation	Check
Upgrade from BusinessObjects Enterprise XI to XI R2	• Migrate user profiles • Migrate universes • Migrate reports • Migrate dashboards • Migrate analytics	*BusinessObjects Enterprise XI R2 Installation Guide*	W
Upgrade from BusinessObjects Enterprise 6.x to XI R2		*BusinessObjects 6 to XI Release 2 Migration Guide*	W
Upgrade from BusinessObjects Enterprise 5.1 to XI R2		*BusinessObjects 5 to XI Release 2 Migration Guide*	W

Convert legacy reports to web-based reports

Task	Information	Documentation	Check
Convert Desktop Intelligence or BusinessObjects full-client reports to Web Intelligence thin-client reports	Convert Desktop Intelligence or BusinessObjects files (`*.rep`) to Web Intelligence files (`*.wid`)	*Desktop Intelligence Report Conversion Guide*	W

Installing BusinessObjects XI R2 and additional component products

Install BusinessObjects Enterprise on Windows or UNIX

Task	Information	Documentation	Check
Install BusinessObjects XI R2 (mandatory) and performance management products (optional) by running the installation type that suits your needs	• Install BusinessObjects XI R2 from scratch • Expand an existing installation to add additional servers or processes • Specify a custom installation to restrict the components installed	*BusinessObjects Enterprise XI R2 Installation Guide***	ICD
Deploy BusinessObjects XI R2 on your chosen web application server	• Deploy BusinessObjects Enterprise on Tomcat • Deploy BusinessObjects Enterprise on WebSphere • Deploy BusinessObjects Enterprise on WebLogic • Deploy BusinessObjects Enterprise on Oracle • Deploy BusinessObjects Enterprise on SAP NetWeaver	*BusinessObjects Enterprise XI R2 Installation Guide***	ICD

** The *BusinessObjects Enterprise XI R2 Installation Guide,* available on the BusinessObjects XI R2 CD for Windows, covers Windows installation information. The *BusinessObjects Enterprise XI R2 Installation Guide,* available on the BusinessObjects XI R2 CD for UNIX, covers UNIX installation information.

Install administration tools (Windows)

Task	Information	Documentation	Check
Enable administrators to design universes for Web Intelligence and Desktop Intelligence reports, as well as for query-based performance management analytics	Install Designer	*BusinessObjects Enterprise XI R2 Installation Guide*	ICD
Enable administrators and end users to add reports to BusinessObjects Enterprise	Install the Publishing Wizard		
Copy data from a Crystal Reports 9 repository database into the CMS database	Install the Repository Migration Wizard		
Import users, groups, reports, and folders from an existing BusinessObjects Enterprise, Crystal Enterprise, or Crystal Info implementation to your new BusinessObjects Enterprise deployment	Install the Import Wizard		
Provide end users access to Crystal Reports over the web	Install Crystal Reports Server		
Create the repository and administer the security for sets	Install Set Analyzer and Set Analyzer Architect	*Set Analyzer and Set Analyzer Architect Online Help*	ICD*

Install end-user products (web)

Task	Information	Documentation	Check
Provide end users the ability to design corporate dashboards and analyze Key Performance Indicators and processes based on metrics and sets	• Install Dashboard Manager • Install Performance Manager • Install Set Analysis • Install Predictive Analysis • Install Process Analysis	*BusinessObjects Enterprise XI R2 Installation Guide*	ICD
	• Install Process Tracker	*Process Tracker Installation Guide*	W*
Provide end users the ability to create, share, and interact with reports on OLAP data sources, over the web	• Install OLAP Intelligence web components	*BusinessObjects Enterprise XI R2 Installation Guide*	ICD
Provide end users the ability to build queries and to design and analyze Desktop Intelligence reports on RDBMS data sources	• Install Desktop Intelligence		
Provide end users the ability to build reports by selecting from predefined business questions	• Install Intelligent Question	*Question Designer Guide*	W, ICD*

Note:

- ICD followed by an asterisk (ICD*) means that the installation CD for a specific product is separate from the BusinessObjects XI R2 installation CD.
- W followed by an asterisk (W*) means that the documentation for a specific product is available with the online download of the software from the Business Objects Customer Support web site at: www.support.businessobjects.com.

Install end-user products (Windows)

Task	Information	Documentation	Check
Provide end users with enterprise reporting design capabilities	Install Crystal Reports	*Installing Crystal Reports XI R2*	ICD*
Provide end users with the ability to design advanced, multi-page reports on OLAP data sources in a Windows application	Install OLAP Intelligence	*OLAP Intelligence XI R2 Installation Guide*	ICD*

Note: ICD followed by an asterisk (ICD*) means that the installation CD for a specific product is separate from the BusinessObjects XI R2 installation CD.

Completing post-installation deployment

Set up security

Task	Information	Documentation	Check
Set authentication methods	Windows AD, Windows NT, LDAP	*BusinessObjects Enterprise XI R2 Administrator's Guide*	W
Define and managing security for users, documents, and data	Procedures to manage users and groups	*BusinessObjects Enterprise XI R2 Administrator's Guide*	W
Set custom security profiles for users and groups	Reference to security options	*BusinessObjects Administrator Reference Guide*	W

Set up the repository for performance management products

Task	Information	Documentation	Check
Create and manage the repository for performance management products	• Deploy the system tables to store metrics, goals, sets, and calendars • Optimize the performance	*Performance Management Setup and Administration Online Help*	ICD

Connect to corporate data sources

Task	Information	Documentation	Check
Create connectivites to RDBMS data sources	• Create connections • Optimize data access • Configure specific data access drivers • Data type conversion reference for supported databases	*Data Access Guide*	W, RCD
Design and manage universes – the semantic layer for for Web Intelligence and Desktop Intelligence reports, as well as for query-based performance management analytics	• Build and manage universes for Web Intelligence, Desktop Intelligence report designers and performance management dashboard builders	*Universe Designer Guide*	W, RCD
Generate universes from XML and Oracle OLAP Analytic Services metadata sources	• Automatically generate universes from selected metadata sources.	*Universal Metadata Bridge Guide*	W
Design business views to map corporate data to Crystal Reports	• Create and manage business views on corporate databases for Crystal Reports designers and users	*Business Views Administrator's Guide*	W, RCD
Connect to OLAP cubes	• Add new OLAP servers • Connect to data cubes • Data source connection settings	*OLAP Intelligence XI Release 2 User's Guide*	W
Design and manage Question Domains – the semantic layer for Intelligent Question reports	• Create and manage the Question Domains for Intelligent Question report designers	*Question Designer Guide*	W

Scaling, tuning, and administering your deployment

Scale your solution

Task	Information	Documentation	Check
Scale your system for optimum reliability	• Ensure fault tolerance and load balancing • Set up a distributed deployment on multiple servers	*BusinessObjects Enterprise XI Release 2 Administrator's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI Release 2 Administrator's Guide (PDF format)	W, RCD

Tune your solution for optimum performance

Task	Information	Documentation	Check
Tune for optimum performance	• Increase scheduled reporting capacity • Increase overall system capacity • Increase on-demand viewing capacity • Increase prompting capacity • Enhance custom web applications • Improve web response speeds • Build in fault tolerance • Optimize network speed and database efficiency	*BusinessObjects Enterprise XI Release 2 Administrator's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI Release 2 Administrator's Guide (PDF format)	W, RCD
Configure the Audit database	• Collect information from user actions and write these actions to a central audit database	*BusinessObjects Enterprise Auditor's Guide*	W, RCD
Optimize performance management products	• Activate tracing • Optimize performance	*Performance Management Setup and Administration Online Help*	ICD

Administer your solution

Task	Information	Documentation	Check
Manage security, objects, jobs, and events	• Set security for users, documents, universes and applications • Publish and import objects to BusinessObjects Enterprise • Schedule jobs and objects • Setup and manage report bursting • Manage events	*BusinessObjects Enterprise XI Release 2 Administrator's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI Release 2 Administrator's Guide (PDF format)	W
Publish objects	• Publish objects to BusinessObjects Enterprise	*BusinessObjects Enterprise XI Release 2 Publishing Guide*	W, RCD

Using BusinessObjects XI R2 products

Manage your business intelligence workspace and documents

Task	Information	Documentation	Check
Access your business intelligence portal to interact with applications and reports, and to organize your workspace	• Navigate documents and categories • Personalize your workspace • Save and share documents • Join discussions • Use Encyclopedia to enter or view metadata on reports	*BusinessObjects Enterprise XI Release 2 InfoView User's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI Release 2 InfoView User's Guide (PDF format)	W

Interact with dashboards and reports and analyze results

Task	Information	Documentation	Check
Analyze and interact with report results	• Modify parameters (or prompts)	*BusinessObjects Enterprise XI Release 2 InfoView User's Guide*	W
	• Drill, filter, and sort results • Modify report formatting	*Performing On-Report Analysis with Web Intelligence*	W

Design reports

Task	Information	Documentation	Check
Build enterprise reports on RDBMS data sources	Design, view, and manage Crystal Reports	*Crystal Reports XI Release 2 User's Guide* (HTML format)	ICD
		Crystal Reports XI Release 2 User's Guide (PDF format)	W, RCD
Build ad hoc queries and reports on RDBMS data sources	Build queries for Web Intelligence reports using Web Intelligence Query – HTML	*Building Reports Using Web Intelligence Query – HTML*	W, RCD
	Build queries for Web Intelligence reports using Web Intelligence Java Report Panel	*Building Reports Using the Web Intelligence Java Report Panel*	W, RCD
	Design and manage Web Intelligence reports using the Web Intelligence Java Report Panel	*Building Reports Using the Web Intelligence Java Report Panel*	W, RCD
	Build simple queries and reports using the Web Intelligence HTML Report Panel (designed for accessibility)	*Building Queries Using the Web Intelligence HTML Report Panel*	W, RCD
	Design queries for Desktop Intelligence reports	*Desktop Intelligence User's Guide: Accessing Data and Data Analysis*	W, RCD
	Design and format Desktop Intelligence reports	*Desktop Intelligence User's Guide: Reporting Techniques and Formatting*	W, RCD
	Build and manage reports built on the Intelligent Question semantic layer	*Intelligent Question Online Help*	ICD

Task	Information	Documentation	Check
Build reports on OLAP data sources	Design and analyze OLAP reports	*OLAP Intelligence XI Release 2 User's Guide online help*	W

Build dashboards and create metrics

Task	Information	Documentation	Check
Get metrics and dashboard creators started	Build corporate dashboards and analytics to visualize metrics, goals, and sets	*Getting Started Creating Dashboards*	W
Use performance management products to monitor corporate performance and implement proactive and predictive business management	Build and customize dashboards, rules and analytics using Dashboard Manager	*Dashboard Manager Online Help*	ICD
	Define goals and communicate and track goals with the groups of users associated with them using Performance Manager	*Performance Manager Online Help*	ICD
	Define and analyze sets using Set Analysis	*Set Analysis Online Help*	ICD
	Predict trends on Key Performance Indicators (KPIs) using Predictive Analysis	*Predictive Analysis Online Help*	ICD
	Analyze trends using Process Analysis	*Process Analysis Online Help*	ICD
	Monitor processes using Process Tracker	*Process Tracker Online Help*	W*

Note: W followed by an asterisk (W*) means that the documentation for a specific product is available with the online download of the software from the Business Objects Customer Support web site at: www.support.businessobjects.com.

Customizing your solution

Customize default display settings and report formats without programming

Task	Information	Documentation	Check
Customize the display settings in BusinessObjects Enterprise applications without programming	• Modify default user settings for display options in InfoView • Customize style sheets and images in InfoView and the Web Intelligence Java Report Panel • Set font and display options for Web Intelligence documents	*BusinessObjects Enterprise Administrator's Reference Guide* (HTML format)	ICD
		BusinessObjects Enterprise Administrator's Reference Guide (PDF format)	W, RCD

Develop custom applications

Task	Information	Documentation	Check
Develop applications using the various software development kits (SDKs) provided with Business Objects products	• Information and samples for Java, .NET, and COM developers. • A comprehensive Developer Library that contains API reference material, sample code and information on how to develop applications using each SDK.	White papers, access to knowledge base articles, and technology-specific zones for Java, .NET, and COM developers.	ICD and the Developer Zone at: www.businessobjects.com/products/dev_zone/

Integrate Microsoft Office

Task	Information	Documentation	Check
Install Microsoft Office components	Install Live Office	*BusinessObjects Enterprise Live Office XI R2 Installation Guide*	ICD
Use Microsoft Office within BusinessObjects applications	Work with Crystal report data, Business View data, and OLAP report data within a Microsoft Office environment.	*BusinessObjects Enterprise Live Office XI R2 User's Guide* **Note:** There are separate help files for Microsoft Excel, Microsoft PowerPoint, Microsoft Word, and Microsoft Outlook	ICD

Integrate BusinessObjects Enterprise products into third-party portals

Task	Information	Documentation	Check
Install the BusinessObjects Enterprise Portal Integration Kit	Install the BusinessObjects Enterprise Portal Integration Kit for Microsoft SharePoint web parts.	*BusinessObjects Enterprise XI R2 Portal Integration Kit Installation Guide for Microsoft SharePoint*	W
	Install the BusinessObjects Enterprise Portal Integration Kit portlets to your BEA WebLogic Portal Server.	*BusinessObjects Enterprise XI R2 Portal Integration Kit Installation Guide for BEA WebLogic*	W
	Install the BusinessObjects Enterprise Portal Integration Kit portlets to your IBM WebSphere Portal Server.	*BusinessObjects Enterprise XI R2 Portal Integration Kit Installation Guide for IBM WebSphere*	W
	Install the BusinessObjects Enterprise Portal Integration Kit portlets to your OracleAS 10g Portal Server.	*BusinessObjects Enterprise XI R2 Portal Integration Kit Installation Guide for OracleAs 10g*	W

Task	Information	Documentation	Check
Set up and administer the BusinessObjects Enterprise Portal Integration Kit	Configure BusinessObjects Enterprise to use the Microsoft SharePoint web parts	*BusinessObjects Enterprise XI R2 Portal Integration Kit Administrator's Guide for Microsoft SharePoint Web Parts*	W
	Configure BusinessObjects Enterprise to use Desktop Intelligence portlets	*BusinessObjects Enterprise XI R2 Portal Integration Kit Administrator's Guide for Desktop Intelligence Portlets*	W
Interact with the BusinessObjects Enterprise Portal Integration Kit	Use the Document List, Document View, and Crystal Report View web parts	*BusinessObjects Enterprise XI R2 Portal Integration Kit User's Guide for Microsoft SharePoint Web Parts*	W
	Use the Document List and Document View portlets	*BusinessObjects Enterprise XI R2 Portal Integration Kit User's Guide for Desktop Intelligence Portlets*	W

Troubleshooting your solution

Resolve errors and trace system activity

Task	Information	Documentation	Check
Understand and solve common errors encountered by BusinessObjects Enterprise	Understand where errors can occur in the BusinessObjects Enterprise framework	*BusinessObjects Enterprise XI R2 Administrator's Guide* (HTML format)	ICD
		BusinessObjects Enterprise XI R2 Administrator's Guide (PDF format)	W, RCD
Resolve specific errors for BusinessObjects XI R2 products	Understand and resolve error messages **Note:** Error messages are categorized by error ID.	*Error Message Guide*	W
Trace your performance management system activity	Activate tracing for performance management products	*Performance Management Setup and Administration online help*	ICD

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