Crystal Reports Server Quick Installation Guide

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What is Crystal Reports Server?

Crystal Reports Server is a complete reporting solution to create, manage, and deliver Crystal reports over the web. It is built on BusinessObjects Enterprise technology. It includes a report publisher and a web portal interface that is used to view reports. It also includes Software Developer Kits (SDK) that allow you to customize Crystal Reports Server and integrate it with your custom applications.

Crystal Reports Server may be installed on a single machine for up to 20 end users to concurrently access, view, and interact with reports on the web without having Crystal Reports installed on their computer. It allows you to store reports in a central database for security and data integrity. Users then access the reports through a web portal.

With Crystal Reports Server, you can set up security to control which end users can access specific folders and reports. You can also specify the rights for users or groups such as who can schedule reports versus export reports.

Who is Crystal Reports Server for?

Crystal Reports Server is ideal for organizations that need to deliver reports over the web to smaller audiences. It does not require that you deal with multiple servers and complicated configurations. Everything is installed on a single server for quick installation and setup.

The quick setup allows you to start using the software to increase your report development productivity and data security almost immediately.

About this guide

This guide provides you with information and procedures for installing Crystal Reports Server on Microsoft Windows. It also includes an overview of Crystal Reports Server with details about how it is built on the proven Business Intelligence platform, BusinessObjects Enterprise.

This guide is all you need to perform a full stand-alone installation of Crystal Reports Server.

For information about more complex installation scenarios, consult the BusinessObjects Enterprise Installation Guide, which is included with Crystal Reports Server.

Who should read this guide

This guide is intended for the system administrator, IT professional, or database administrator who needs to install Crystal Reports Server. Familiarity with your database environment and your web server software is especially beneficial.

BusinessObjects Enterprise guides

Because Crystal Reports Server is built on the BusinessObjects Enterprise framework, you have received BusinessObjects Enterprise guides with this product.

After you have finished installing Crystal Reports Server, it is suggested that you begin consulting the BusinessObjects Enterprise guides included with this product. While you are referring to the BusinessObjects Enterprise guides, you may encounter some information that does not apply to Crystal Reports Server. To help you differentiate between the information that applies to Crystal Reports Server and the information that does not, review "Crystal Reports Server and BusinessObjects Enterprise" on page 22.

Business Objects information resources

For more information and assistance, see Appendix A: Business Objects Information Resources. This appendix describes the Business Objects documentation, customer support, training, and consulting services, with links to online resources.

Introduction to Crystal Nepoles 2. Business Objects information resources Introduction to Crystal Reports Server

Installing Crystal Reports Server on Windows

Installation overview

Crystal Reports Server is a server-side installation. This means that you install it on one central server rather than on each user's machine. Users then access Crystal Reports Server from their individual machines through the web portal interface, or InfoView. This installation method is the quickest way to install Crystal Reports Server.

Before you begin

Review the system requirements before you begin installing Crystal Reports Server. The optional configuration information is not required to successfully install Crystal Reports Server.

System requirements

Generally, the following components must be installed and configured correctly on the server before you install Crystal Reports Server:

- Windows operating system
- Internet Explorer or Netscape Navigator
- Web server software

For a detailed list of tested environments, please consult the Platforms.txt file included with your product distribution.

Optional configuration

The tasks outlined in this section are not required for you to successfully install Crystal Reports Server. Depending on how you decide to configure your Crystal Reports Server environment, you may or may not want to perform them.

If you want to perform a basic installation, go directly to "Full stand-alone installation" on page 13.

Configuring a database

Crystal Reports Server requires a database to store information about the system and its users. This database is known as the Central Management Server (CMS) database. The CMS is a server that stores information about the Crystal Reports Server system. Other components of Crystal Reports Server can access this information as required.

If you want to configure a database separately from the Crystal Reports Server installation, read this section. If you do not want to configure a database separately, skip this section. If you do not configure a database separately, the Crystal Reports Server installation process will automatically install the Microsoft Data Engine (MSDE) and walk you through it's setup for Crystal Reports Server.

The CMS stores information about the following:

Security

The CMS database stores information about the users created for the system and the rights they have been granted. The CMS enforces these rights.

Objects

The CMS database stores information about the location of Crystal reports in the Crystal Reports Server system. It also maintains the hierarchy of folders, categories, and inboxes that the objects are organized into.

Servers

The CMS database stores a list of various Crystal Reports Server servers status. Other components can access the database to get information about the availability of services required to perform tasks in the system.

For detailed information about each server, see the *BusinessObjects Enterprise Administrator's Guide*.

For a detailed list of tested environments, please consult the Platforms.txt file included with your product distribution. This file includes specific version and Service Pack requirements for web servers, web browsers, web application servers, databases, and operating systems.

For additional important information that may pertain to your deployment, it is also strongly recommended that you consult the *Release Notes* included with your product distribution (release.pdf, release.htm, or release.rtf).

Setting up the CMS database

If necessary, the Setup program installs and configures its own Microsoft Data Engine (MSDE) database. The MSDE is a client/server data engine that provides local data storage and is compatible with Microsoft SQL Server. If you already have the MSDE or SQL Server installed, the New installation option of the installation program creates the CMS database using your existing database engine.

You can migrate this initial CMS database to another supported database server later. For details, see "Configuring the intelligence tier" in the *BusinessObjects Enterprise Administrator's Guide*.

Note:

- See the Platforms.txt file included with your product distribution for a complete list of tested database software and version requirements.
- Ensure that your database server is set up to use Unicode character encoding (such as UTF-8). Consult your database documentation to determine the settings required for a Unicode configuration. For database servers such as Oracle and Sybase, during installation you need to configure the server to use Unicode encoding for the character data types. For other databases, such as DB2 and Informix, you can create the CMS database with Unicode settings on your existing database server.
- Before installing Crystal Reports Server atop an existing installation of the MSDE or Microsoft SQL Server, you need to complete several preparatory steps before running the Crystal Reports Server setup program.
- To set up a database account for Crystal Reports Server on MSDE
- Determine whether the CMS should use Windows NT or SQL Server authentication when connecting to your local database installation.
- Using your usual administrative tools, create or select a user account that provides Crystal Reports Server with the appropriate privileges to your database server:
 - If you want the CMS to connect to its database using Windows NT authentication, ensure that the Windows NT user account that you assign to the CMS belongs to the System Administrators role in your SQL Server installation.
 - In this scenario, the Windows NT user account that you assign to the CMS is not actually used to create the system database during the installation process. Instead, your own Windows NT administrative account is used to create the database, so verify that your Windows NT account also belongs to the System Administrators role in your SQL Server installation.
 - If you want the CMS to connect to its database using SQL Server authentication, the login that you assign to the CMS must belong to the Database Creators role in your SQL Server installation.
 - In this scenario, the SQL Server credentials that you assign to the CMS are also used to create the database and its tables.

3. Verify that you can log on to SQL Server and carry out administrative tasks using the account you set up for use by the CMS.

Installing on a non-system drive

If you want to install Crystal Reports Server onto a drive other than the default C:\ drive, read this section.

You can install Crystal Reports Server on any drive on your machine. The Setup program installs Crystal Reports Server files only on the drive that you specify.

There is one exception to this rule. If you previously installed another Business Objects product, such as Crystal Reports, the Crystal Reports Server Setup program automatically uses the existing common directory for any shared Business Objects product files that it adds. If this common directory is on the system drive (that is, the drive containing your operating system files), Crystal Reports Server automatically installs its shared files there.

To install several Business Objects products on a non-system drive, install Crystal Reports Server first. All Business Objects products that you install subsequently will use this same non-system drive for their shared files.

Note: If the Microsoft Data Engine (MSDE) or Microsoft SQL Server is already installed on the local machine, you must first set up an account for the CMS. For details, see "Setting up the CMS database" on page 11

Full stand-alone installation

This installation scenario offers the quickest way to install Crystal Reports Server.

When you perform this default installation, all the client and server components are installed on the local machine. An MSDE database for the Central Management Server (CMS) is automatically created. Default user and group accounts are created, and sample reports are published to the system. When the installation is complete, the server components are started as services on the local machine.

To install all components

1. Unless Autoplay is enabled for your CD-ROM drive, run **setup.exe** from the win32 directory of your product distribution.

When you start the installation, the Microsoft Windows Installer may need to be installed or upgraded on the local machine. If so, the Wise Installation Wizard performs the necessary modifications and prompts you when finished. Click Yes to restart the machine and resume the installation automatically.

In the Select Client or Server Installation dialog box, choose Perform Server Installation.

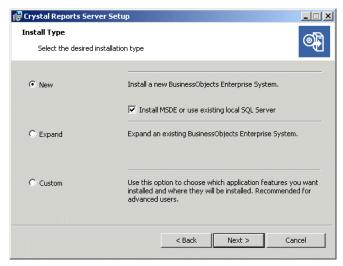
The Perform Server Installation option ensures that all required Crystal Reports Server components are installed.

The Perform Client Installation option that also appears here only installs client tools onto a machine. This installation can be used to administer your Crystal Reports Server environment remotely. For detailed information about this type of installation, see the "Client Tools Installation" section of the *BusinessObjects Enterprise Installation Guide*.

- Proceed through the Setup program's dialog boxes and follow the instructions on the screen until you reach the Directory Selection dialog box. Select a location and click **Next**.
- 4. If you chose to install to the default location, go to step 5. If you chose to install on a drive other than the default location (C:\Program Files\Business Objects\BusinessObjects Enterprise 11), the Setup program asks you to select a drive for the installation of shared files. These common files are also used by Business Objects products such as Crystal Reports.

Note:

 To install several Business Objects products on the same machine without installing files on the default system drive, first install Crystal Reports Server. When you subsequently install Crystal Reports, it will use the common file directory created by Crystal Reports Server. Otherwise, the Setup program proceeds directly to the Installation Type dialog box.



- 5. Click New.
- If the Microsoft Data Engine (MSDE) or Microsoft SQL Server is already installed on the local machine, or if you want to install MSDE as your CMS database, select the Install MSDE or use existing local SQL Server option.

If you want to use another database for the CMS, such as Oracle or Sybase, clear the selection on the **Install MSDE or use existing local SQL Server** option.

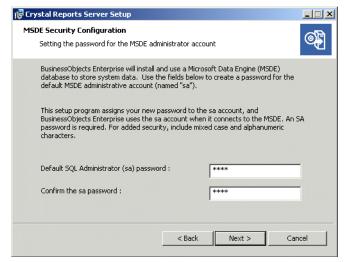
- Click Next.
- In the Choose Web Component Adapter Type dialog box, select IIS ASP.NET and click Next.
 - The WCA is an application that acts as a gateway between your web server and the Crystal Reports Server components. It receives and processes all HTTP requests that are sent to Crystal Reports Server from user's web browsers. For more details about the WCA, see the *BusinessObjects Enterprise Administrator's Guide*.
- 9. If you did not select the Install MSDE or use existing local SQL Server option in the Install Type dialog box, go to step 12. If you selected the Install MSDE or use existing local SQL Server option in the Install Type dialog box, the setup program will attempt to detect an existing installation of the MSDE or SQL Server.

 If the setup program detects the MSDE or SQL Server, use the Microsoft SQL Server Authentication dialog box to provide the credentials that correspond to the database account you set up for the CMS.

Note: If you have not yet created an account for the CMS, see "Setting up the CMS database" on page 11.

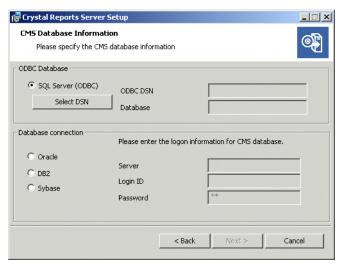
Select **Overwrite database** to overwrite any existing CMS database on this machine and proceed with the install. (If there is an existing CMS database, you must select this option to proceed with the installation. See the *BusinessObjects Enterprise Administrator's Guide* for information on migrating data from a CMS database).

 If the setup program does not detect an existing MSDE or SQL Server database, use the "MSDE Security Configuration" dialog box to create a password for the default SQL administrator account that will be installed along with the MSDE.



The setup program later configures the CMS to connect to its system database using this "sa" account and the password you create here.

10. If you did not select the Install MSDE or use existing local SQL Server option in the Install Type dialog box, the CMS Database Information dialog box appears.



Specify the database connection type that the CMS must use to connect to the CMS database:

- If you select SQL Server or Informix, click Select DSN to choose (or create) the appropriate system data source and provide the database Login ID and password. Then click Next.
- If you select Oracle, DB2, or Sybase, enter the name of the database server, along with the database Login ID and password. Then click Next.
- **11.** When you reach the Start Installation dialog box, click **Next**.
 - The installation of files begins immediately. During the installation process, you may be prompted to restart the local machine. When the installation program has finished copying files, you are given the opportunity to register your product.
- 12. When you reach the final setup dialog box, clear Launch Publishing Wizard unless you want to publish your own reports to Crystal Reports Server immediately.
 - **Tip:** Sample reports are installed by default, so you can verify your installation and learn your way around Crystal Reports Server.
- 13. Click Finish.

When the installation is complete, you can access Crystal Reports Server by opening your web browser and going to:

2 Installing Crystal Reports Server on Windows Full stand-alone installation

http://webserver/businessobjects/enterprise11/

Here, the term webserver represents the name of the local machine.

If you cannot access Crystal Reports Server, start the Central Configuration Manager (CCM) from the BusinessObjects 11 program group. Ensure that all of the servers listed are both started and enabled.

To ensure that all servers are started

 Go to Start > Programs > BusinessObjects 11 > Crystal Reports Server > Central Configuration Manager.

In the Central Configuration Manager, you will see a list of all the Crystal Reports Server servers.

- Ensure that all the servers in the list have a status of Running. All started servers also have an icon of a server with a green arrow to their left. If there are any servers that have a status of Stopped, they must be started before you can access Crystal Reports Server.
- To start a server, right-click the server name and select Start from the submenu.

Tip: Alternatively you can select the server name and click the Start icon on the main toolbar.

To ensure that all servers are enabled

- When all servers are started, you must ensure that they are also enabled.
 To do this, click the Enable/Disable Servers icon. You will be prompted to log on to BusinessObjects Enterprise.
- In the System field, type the machine name.
- 3. In the User Name field type Administrator.
- Leave the Password field blank.
- From the Authentication list select Enterprise and click Connect. You will be logged on to the Crystal Reports Server system.
- 6. In the "Enable/Disable Servers under <machinename> machine" dialog box, ensure that to the left of all servers there is an icon of a server with a green arrow. This indicates that the servers are enabled. If there is an icon of a server with a do not enter symbol to the left of any of the servers, this indicates that the server is disabled.

Note: <*machinename*> represents the name of the machine on which Crystal Reports Server is installed.

If any of the servers are disabled, select the checkbox to the left of the server and click OK. 8. Now when you open the "Enable/Disable Servers under < machinename > machine" dialog box, all the servers are enabled.

Now that Crystal Reports Server is installed, refer to the next chapter of this guide, "Crystal Reports Server Product Information", for an overview of Crystal Reports Server components and important licensing information.

Consult the BusinessObjects Enterprise Administrator's Guide, the BusinessObjects Enterprise Getting Started Guide, and the BusinessObjects Enterprise User's Guide for more information about using Crystal Reports Server. Online versions of these guides are included in the doc directory of your product distribution. These documents are also accessible from the Administration Launchpad, Crystal Reports Server's web based interface.

2 Installing Crystal Reports Server on Windows Full stand-alone installation

Crystal Reports Server Product Information

Crystal Reports Server and BusinessObjects Enterprise

Crystal Reports Server is based on the proven Business Intelligence platform, BusinessObjects Enterprise. This makes it straight forward to upgrade to BusinessObjects Enterprise Professional or Premium for additional capabilities such as auditing, dashboards, query and analysis, and scalable, mission-critical enterprise reporting.

Keep the features in this section in mind when you are configuring your Crystal Reports Server environment and referring to the rest of the documentation included with this product.

Licensing

A maximum of 20 users can connect to Crystal Reports Server concurrently. For detailed information about this, see "Licensing" on page 23.

Installation

- All Crystal Reports Server components must be installed on a single server. The server can have a maximum of four processors on it.
- Crystal Reports Server is supported on Windows only.

File Types

You can publish and view the following file types with Crystal Reports Server:

- Crystal reports (.rpt)
- Microsoft Word (.doc)
- Microsoft Excel (.xls)
- Microsoft PowerPoint (.ppt)
- Adobe Acrobat (.pdf)

Other file types are not supported.

If you have larger enterprise reporting requirements, are interested in other licensing options or require additional features, you can upgrade to BusinessObjects Enterprise Professional or Premium. For more information about these products, visit http://www.businessobjects.com

Licensing

Note: This explanation is only a guideline. For complete details on licensing terms and conditions, please consult the End User License Agreement (license.txt) located in the /docs directory of your program installation.

When you purchase Crystal Reports Server, your package includes the following:

- one Crystal Reports Developer edition report designer
- five concurrent access licenses for end user report viewing via the web
- one year of technical support and maintenance

Crystal Reports

The report designer is licensed on a named user basis. This means that one individual may install and use the designer to create Crystal reports. This license may not be shared with others. If you require additional designer licenses, you may purchase Crystal Reports Professional or Developer edition.

InfoView

The InfoView has five concurrent access licenses (CAL). These licenses accept a maximum of five concurrent logons per package purchased. This means that five people can simultaneously connect to the Crystal Reports Server system for report viewing.

If you require more than five simultaneous connections, you may purchase additional Crystal Reports Server packages. These additional packages may be used within a single deployment. The maximum deployment size for a single system is 20 concurrent users.

If you receive a License Key Error message such as "An unknown error has occurred in the license key system. Please confirm that you have not exceeded the maximum number of licenses for this product...", this means you have reached the maximum number of 20 allowed licenses on a single system.

Server Licenses

Each Crystal Reports Server system may be installed on a single server machine with a maximum of four processors.

For complete details on licensing terms and conditions, please consult the End User License Agreement (license.txt) located in the <code>/docs directory</code> of your program installation.

Promotional bundle

If you received Crystal Reports Server as part of a promotional bundle with Crystal Reports Professional and Developer editions, you have five named user licenses for Crystal Reports Server. You can use these licenses by assigning unique user IDs to five individuals so they can access and view reports over the web.

Licenses received through multiple copies of Crystal Reports Professional or Developers Editions may not be combined for use within the same system. If you require additional licenses to increase your system beyond five users, you may purchase the Crystal Reports Server package(s) outlined under "InfoView" on page 23.

Crystal Reports Server components

This section provides a brief overview of the Crystal Reports Server components with details about where to find more information about them.

Crystal Reports Server includes the following components:

Crystal Reports

A report designer that allows you to design and produce highly formatted reports from virtually any data source. Built-in report experts guide you step by step through building reports and completing common reporting tasks. Formulas, cross-tabs, subreports, and conditional formatting help make sense of data and uncover important relationships that might otherwise be hidden. These reports can then be published and shared over the web.

For more information, see the Crystal Reports User's Guide.

InfoView web portal interface

A web desktop that provides a window to Crystal reports published to Crystal Reports Server. InfoView allows you to view, schedule, export, and save Crystal reports.

For more information, see the *BusinessObjects Enterprise XI InfoView User's Guide*.

Central Configuration Manager

A server management tool that allows you to configure each Crystal Reports Server server component. You can start, stop, enable, and disable servers using the CCM. It also allows you to configure port numbers and system database configuration.

For more information, see "Administering BusinessObjects Enterprise" and "Managing and Configuring Servers" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Central Management Console

A web application that provides a way to manage the Crystal Reports Server environment. It can be used to manage users, content, and server.

For more information, see "Administering BusinessObjects Enterprise" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Scheduling

You can run Crystal reports automatically at set times. The report that is created is saved by the system and can be viewed by users at any time such as daily, weekly, hourly, or on any predefined business calendar.

For more information, see "BusinessObjects Enterprise Security Concepts" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Security

Crystal Reports Server allows you to set security so that you can avoid unauthorized access to the system. It contains it's own Enterprise authentication method and also supports third-party Windows NT, LDAP, and Active Directory authentication.

For details about security, see "BusinessObjects Enterprise Security Concepts" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Viewers

Report Viewers display Crystal reports pages in users' web browser. There are different Report Viewers available.

For more information, see "Report Viewers" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Software Developer Kits

Allows application developers to build application and portal integration on top of Crystal Reports Server.

For more information, see "Developer Documentation" by going to the BusinessObjects 11 program group and selecting Crystal Reports Server and then selecting SDK Documentation.

Import Wizard

A locally installed tool that allows administrators to import users, groups, folders, and reports from an existing BusinessObjects Enterprise, Crystal Enterprise, or Crystal Info implementation to Crystal Reports Server.

Crystal Reports Server Product Information Crystal Reports Server components

For more information, see "Importing Objects to BusinessObjects Enterprise" in the BusinessObjects Enterprise XI Administrator's Guide.

Publishing Wizard

A locally installed tool that allows administrators and users to add Crystal reports to Crystal Reports Server.

For more information, see "Publishing Objects to BusinessObjects Enterprise" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Business View Manager

Allows database administrators to build and modify Business Views objects that allow users and report designers simplified access to the data they require. Business Views also allows you to integrate data from disparate data sources into one Business Views object.

For more information, see "Business Views Architecture" in the *Business Views Administrator's Guide*.

Repository Migration Wizard

A tool that allows you to copy the data from an existing repository database into another data source. The source data is not removed.

For more information, see "Managing BusinessObjects Enterprise Repository" in the *BusinessObjects Enterprise XI Administrator's Guide*.

Data Source Migration Wizard

A tool that allows you to migrate Crystal reports that are based on Crystal queries, dictionaries, and InfoViews to Crystal Reports Server.

Consult the BusinessObjects Enterprise Administrator's Guide, the BusinessObjects Enterprise Getting Started Guide, and the BusinessObjects Enterprise User's Guide for more information about using Crystal Reports Server. Online versions of these guides are included in the doc directory of your product distribution. These documents are also accessible from the Administration Launchpad, Crystal Reports Server's web based interface.

Business Objects Information Resources



Documentation and information services

Business Objects offers a full documentation set covering its products and their deployment. Additional support and services are also available to help maximize the return on your business intelligence investment. The following sections detail where to get Business Objects documentation and how to use the resources at Business Objects to meet your needs for technical support, education, and consulting.

Documentation

You can find answers to your questions on how to install, configure, deploy, and use Business Objects products from the documentation.

What's in the documentation set?

View or download the *Business Objects Documentation Roadmap*, available with the product documentation at http://www.businessobjects.com/support/.

The Documentation Roadmap references all Business Objects guides and lets you see at a glance what information is available, from where, and in what format.

Where is the documentation?

You can access electronic documentation at any time from the product interface, the web, or from your product CD.

Documentation from the products

Online help and guides in Adobe PDF format are available from the product Help menus. Where only online help is provided, the online help file contains the entire contents of the PDF version of the guide.

Documentation on the web

The full electronic documentation set is available to customers on the web from support web site at: http://www.businessobjects.com/support/.

Documentation on the product CD

Look in the docs directory of your product CD for versions of guides in Adobe PDF format.

Send us your feedback

Do you have a suggestion on how we can improve our documentation? Is there something you particularly like or have found useful? Drop us a line, and we will do our best to ensure that your suggestion is included in the next release of our documentation: documentation@businessobjects.com.

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

Customer support, consulting and training

A global network of Business Objects technology experts provides customer support, education, and consulting to ensure maximum business intelligence benefit to your business.

How can we support you?

Business Objects offers customer support plans to best suit the size and requirements of your deployment. We operate customer support centers in the following countries:

- **USA**
- Australia
- Canada
- United Kingdom
- Japan

Online Customer Support

The Business Objects Customer Support web site contains information about Customer Support programs and services. It also has links to a wide range of technical information including knowledgebase articles, downloads, and support forums.

http://www.businessobjects.com/support/

For support information specifically about Crystal Reports Server, go to http://support.businessobjects.com/crserver

Looking for the best deployment solution for your company?

Business Objects consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in relational and multidimensional databases, in connectivities, database design tools, customized embedding technology, and more.

For more information, contact your local sales office, or contact us at:

http://www.businessobjects.com/services/consulting/

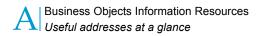
Looking for training options?

From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style. Find more information on the Business Objects Education web site:

http://www.businessobjects.com/services/training

Useful addresses at a glance

Address	Content
Business Objects product information http://www.businessobjects.com	Information about the full range of Business Objects products.
Product documentation http://www.businessobjects.com/ support	Business Objects product documentation, including the Business Objects Documentation Roadmap.
Business Objects Documentation mailbox	Send us feedback or questions about documentation.
documentation@businessobjects.com	
Online Customer Support http://www.businessobjects.com/ support/	Information on Customer Support programs, as well as links to technical articles, downloads, and online forums.
Business Objects Consulting Services http://www.businessobjects.com/ services/consulting/	Information on how Business Objects can help maximize your business intelligence investment.
Business Objects Education Services http://www.businessobjects.com/ services/training	Information on Business Objects training options and modules.



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