



# **Web Report Library User Guide**

## **Advanced Course**

**Prepared for:**

Finance & Administration

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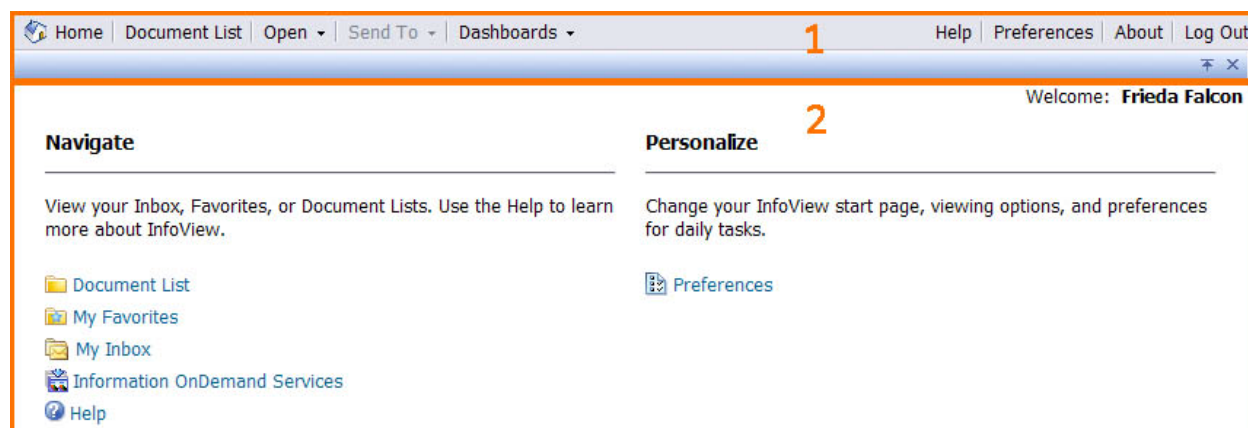
## Introduction

The Advanced Training class is a continuation of the Basic Training class. Topics are covered in a more in-depth manner and new functionality is taught. There is an assumption that attendees have already requested and received access to the Library and have attended a Basic Training class.

## InfoView Overview

InfoView is divided into two panels.

1. Header Panel
2. Workspace Panel



## Header Panel

The Header Panel can be used to perform the following actions:

Option	Description
Home	Returns you to the InfoView Home page.
Document List	Displays the list of folders and documents available to the user based on security access rights.

Open *	Opens components of InfoView: My InfoView, Encyclopedia and Dashboards & Analytics
Send To *	A drop-down menu that allows you to send documents to another InfoView user via that individual's InfoView Inbox, email or File Transfer Protocol (FTP).
Dashboards *	Allows you to access dashboards and analytics.
Help	Displays the appropriate help topic based on the current field or function selected.
Preferences	Allows you to set your preferences concerning the way InfoView pages display. You can customize such things as your initial view in InfoView upon logging on, how many documents display on a page and whether your default navigation method to documents is through folders or categories.
About	Displays product and sales information about InfoView
Log Out	Click this button to log out of InfoView.

\* These topics may be covered in future training classes. Currently they are under development and are not available for use.

## Workspace Panel

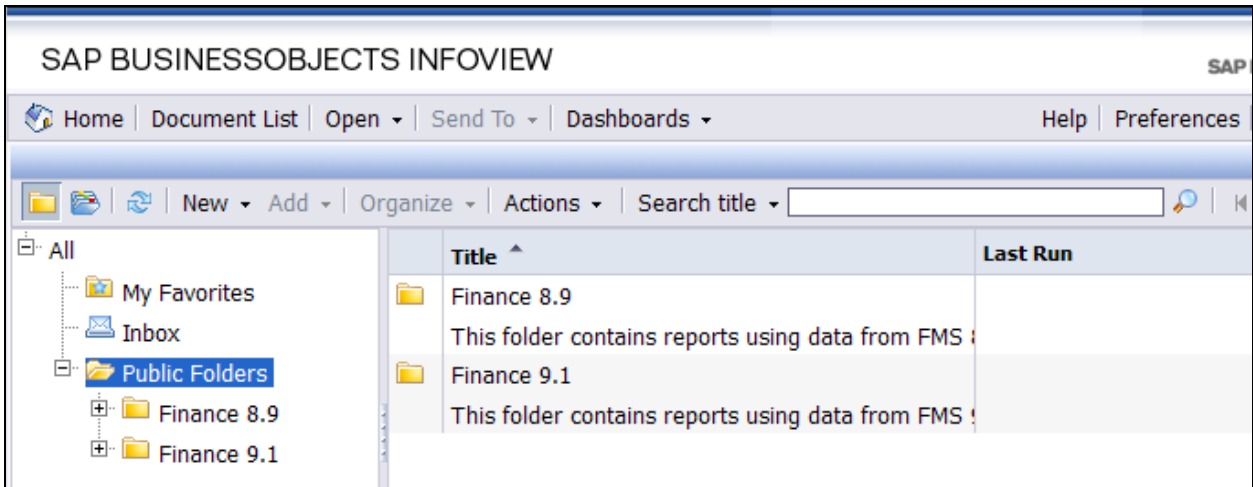
The **Workspace panel** displays InfoView content. It is in this panel that you do activities such as viewing, scheduling, and modifying objects, setting your InfoView preferences, browsing the **Document List** and so on. The toolbars and other features of the **Workspace panel** change according to your current task.

## Advanced Searching

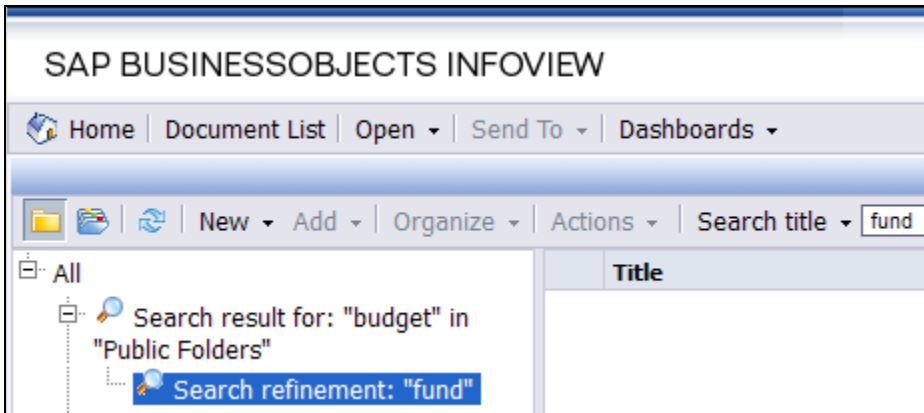
You can do a structured search to find objects in InfoView. A basic search is performed in the public folders that you have the rights to view.

### To search for an object

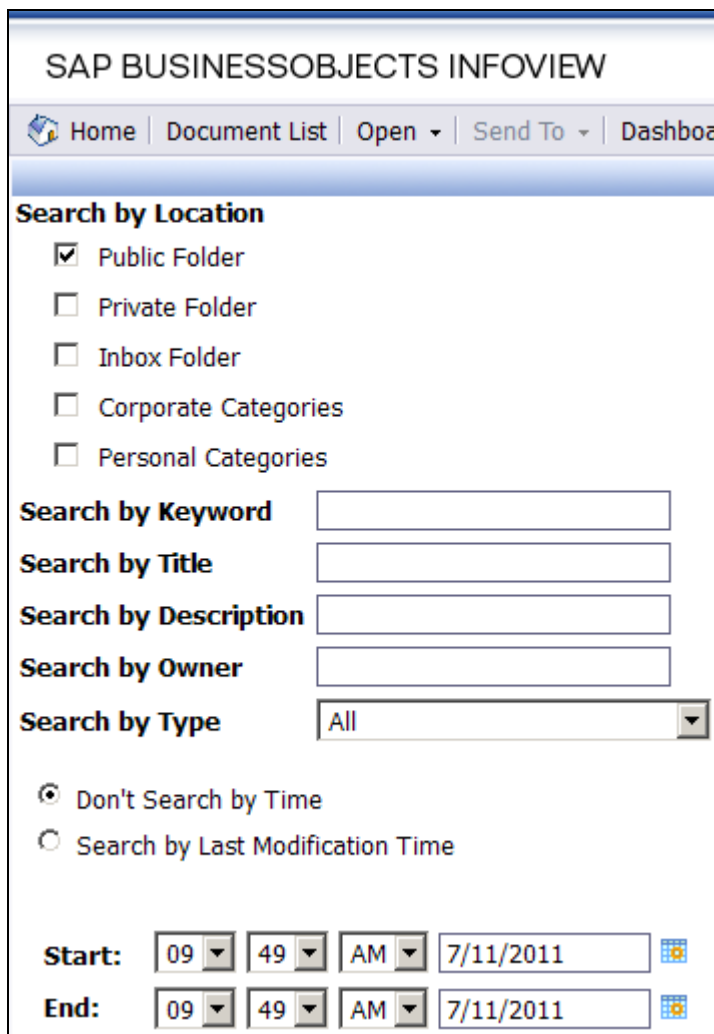
1. Select Public Folders. Then, in the Header panel toolbar, locate the search text box and type the word(s) that you want find.



2. Be aware that you must highlight the folder in which you wish to search. Otherwise, you will be doing a sub-search within your initial search.



3. You can also click Advanced Search to see additional options that allow you to search for objects by location, description, owner, type, and the time when an object was last modified. You must select a search location in order to use the Advanced Search.



The screenshot shows the SAP BusinessObjects InfoView search interface. At the top, there is a navigation bar with links for Home, Document List, Open, Send To, and Dashboard. Below this is a section titled "Search by Location" with five checkboxes: Public Folder (checked), Private Folder, Inbox Folder, Corporate Categories, and Personal Categories. There are five input fields for "Search by Keyword", "Search by Title", "Search by Description", "Search by Owner", and "Search by Type" (which is a dropdown menu currently set to "All"). Below these are two radio buttons: "Don't Search by Time" (selected) and "Search by Last Modification Time". At the bottom, there are "Start" and "End" time/date pickers, each with dropdowns for hour, minute, and AM/PM, and a date field set to 7/11/2011.

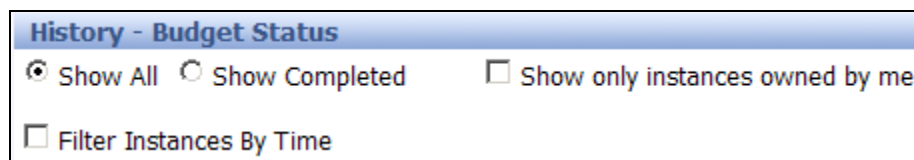
## Scheduling Reports via InfoView

Scheduling an object allows you to run it automatically at specified times. When a scheduled object runs successfully, an instance is created. An instance is a version of the object that contains data from the time that the object was run. You can see a list of instances by looking at an object's history, and you can view any of the instances to which you have privileges.

## Viewing Object History

To view a scheduled report, go to the folder that contains the report in question and right click on it. Navigate to History. You will see a list of all of the scheduled instances of that report.

You are able to narrow the results by selecting different criteria at the top of the list. For example, you can show only the instances that you scheduled or narrow it further by setting a time range for when the report was run.

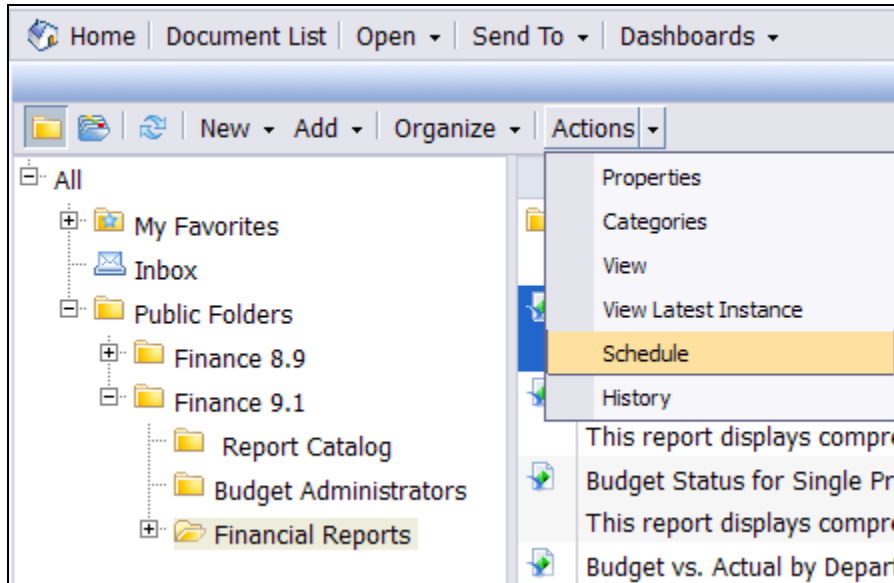


The screenshot shows a filter menu titled "History - Budget Status". It contains four options: "Show All" (selected with a radio button), "Show Completed" (radio button), "Show only instances owned by me" (checkbox), and "Filter Instances By Time" (checkbox).

Scheduled instances, regardless of who scheduled them, are available to any user who has been approved for access to that data.

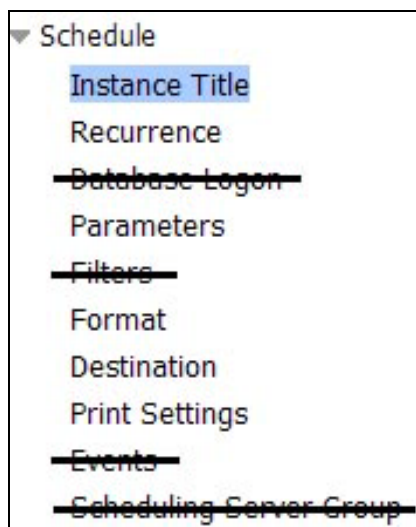
## Schedule a report

1. Navigate to the desired report
2. Highlight the report, click Actions, select Schedule



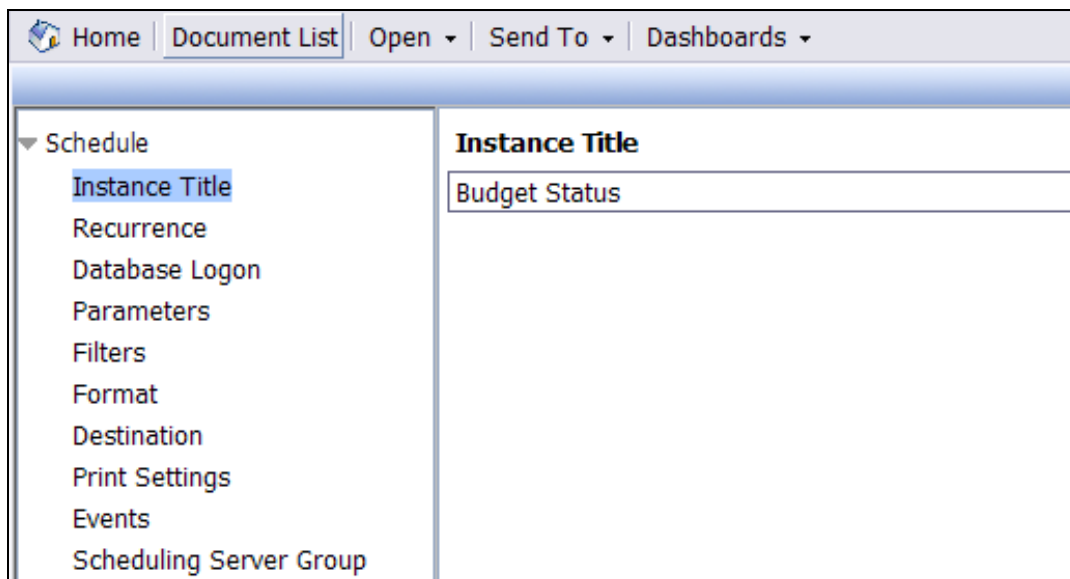


When scheduling a report, we need to tell the system what we want. For example, InfoView needs to know what to call the report, when to run it, what parameters and format to use, where to store it and how to print it. If you look at the list below, you'll see that some items have been crossed off. These questions have been answered for you by our Server and System Administrators.



## Instance Title

The default entry for the Instance Title is the name of the report. You can change or add to the name in order to make it meaningful for you.



## Recurrence

This option specifies a schedule for running an object. The following parameters are available:

- **Now:** When you click Schedule, the object runs once (immediately).
- **Once:** This option requires a start time parameter. The object runs once at the time that you specify.
- **Hourly:** This option requires information in hours and/or minutes for how frequently the object is run. Instances are created regularly to match the parameters that you enter. The first instance is created at the start time that you specify.
- **Daily:** This option requires a start time parameter. The object runs once every N days at the time that you specify.
- **Weekly:** This option requires a start time parameter. Each week, the object runs on the selected days at the time that you specify.
- **Monthly:** This option requires a start date and time, along with a recurrence interval in months. The object runs on the specified date and time every N months.
- **Nth Day of Month:** This option requires a day of the month on which the object is run. Instances are created regularly each month on the day that you enter at the start time that you specify.
- **1st Monday of Month:** This option requires a start time parameter. An instance is created on the first Monday of each month at the time that you specify.
- **Last Day of Month:** This option requires a start time parameter. An instance is created on the last day of each month at the time that you specify.
- **X Day of Nth Week of the Month:** This option requires a start time parameter. An instance is created monthly on a day of a week that you specify.
- **Calendar** Although this option is not yet available, it allows you to select a calendar of dates. (Calendars are customized lists of schedule dates that are created by the System Administrator.) An instance is created on each day that you specify in the calendar.

## Database Logon

Some objects require you to log on to a database before you can successfully schedule them. We have provided this log on information as the default entry. There is no need to change this information.

### Data Sources

## Parameters

The parameters marked with an (\*) are required.

Parameter	Value	
* pFiscalYear	[EMPTY]	Edit
* pAccountingPeriod	[EMPTY]	Edit
* pDepartment	[EMPTY]	Edit
* pFund	[EMPTY]	Edit
* pAccountDetail	[EMPTY]	Edit
* pReportFormat	[EMPTY]	Edit

Click Edit to update each parameter.

Parameter	Value	
* pFiscalYear	2011	<input type="button" value="Edit"/>
* pAccountingPeriod	12 - June	<input type="button" value="Edit"/>
* pDepartment	114000 - Dean of Business	<input type="button" value="Edit"/>
* pFund	ALL - All Departmental Funds	<input type="button" value="Edit"/>
* pAccountDetail	Display Account Details	<input type="button" value="Edit"/>
* pReportFormat	Report Format	<input type="button" value="Edit"/>

## Filters

Filters are not currently used because you have to use the desktop client and then change the function of the report itself. This functionality is not necessary while scheduling because it has already been filtered by the report writers.

## Format

Select the desired report output type. The Crystal Reports option is only available to the Enterprise Report Writers as it requires the Crystal Reports desktop client and is used only for modifying the report itself. All other options are available to all users.

**Format Options**

Crystal Reports

Crystal Reports

Microsoft Excel (97-2003)

Microsoft Excel (97-2003) (Data Only)

Microsoft Word (97-2003)

**PDF**

Rich Text Format (RTF)

Microsoft Word - Editable (RTF)

Plain Text

Paginated Text

Tab Separated Text (TTX)

Separated Values (CSV)

XML

Use the export options defined in the report.

## Destination

When you schedule a report, we recommend that you save it to the **Default Enterprise Location** – otherwise known as the history. From the history, you will be able to export or print your report for 2 weeks after it was completed. After two weeks, the report will be removed from history and will need to be rescheduled. When you schedule the report, you will be able to send yourself a reminder email that your report was completed successfully.

**REMINDER:** As an approved user of the Web Report Library, you are responsible for what you do with and to whom you send any BGSU data. Please carefully consider the need to share information before you export or print it.

Option	Description
Destination: <input type="text" value="Email"/>	The Email option allows the scheduler to send notifications to any designated email address.
<input checked="" type="checkbox"/> Keep an instance in the history	Check this box to keep a copy in InfoView History.
<input type="checkbox"/> Use default settings	Uncheck this box to access the email selection screen.
From:	Type a return email address. This must be a valid email address or the instance will fail.
To:	Type the email addresses to which you would like to send the notification. Separate multiple email addresses with semicolons.
CC:	Type the email addresses to which you would like to send copies of the notification. Separate multiple email addresses with semicolons.
Subject	Type the subject line of the email.  <b>Note:</b> You can select variables to be included in the subject from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.

Add attachment	Deselect this checkbox to remove the instance to the email as an attachment
Attachment	<p>We do not recommend sending the instance as an attachment. Here are the two most important reasons for this recommendation:</p> <ol style="list-style-type: none"> <li>1. There is a size limit to files sent via email. Many of the reports in the WRL are larger than this limit and will therefore fail.</li> <li>2. Security considerations. By requiring users to access the WRL directly to view the report, you insure that they have the proper security rights to do so. If you email it directly to them, you take on that responsibility.</li> </ol>
Message	<p>Type the message that will appear in the body of the email.</p> <p><b>Note:</b> You can select variables to be included in the body from the list beside the field. The variable is added to the end of the text in the box. The variables you can add include the object's title, ID, owner, the date and time, your email address, and your name.</p>

Destination:  

 Keep an instance in the history  
 Use default settings

From:

To:

Cc:

Subject:

Message: 

This is an automatic email reminder that the Monthly Budget Status Report is now available via the Web Report Library. The report will be available for the next 2 weeks and will then be removed from the system. Feel free to access and export the report if you wish to retain it.

To access the report, please visit [ods.bgsu.edu](http://ods.bgsu.edu), navigate to Public Reports/Finance/Financial Reports/Budget Status Report. Highlight the report, right click and select History.

Deliver Document(s) as Attachment  
 Use Automatically Generated Name  
 Use Specific Name

## Other Destination Options

- **Default Enterprise Location:** If you select this option, the report will be viewable from the InfoView History only. You will not receive an automatic email notification. Instances in History are automatically purged on a regular basis.
- **Business Objects Inbox:** This is the InfoView specific email system. It functions like Outlook but is less flexible and much less user friendly. We recommend that you skip this option.
- **FTP Server and File System** are not currently enabled.

## Print Settings

When you schedule a report, we recommend that you select the “Always print to PDF” option. Other options are not currently supported and may cause the report to fail.

### Print Settings

Please select a print mode in Web viewer

- Always print to PDF
- Follow Crystal Reports preference setting

Print Crystal reports when scheduling

### Specify page layout

The page layout will be applied to all formats.

Set layout to:

**Events:** Setting events is not currently available.

## Scheduling Server Group

When you schedule an object, you can select the server group that is used by the system to run the object. However, this selection has already been made by the report writers and you only need to leave the default for best performance.

Set the default servers to use for scheduling this object:

- Use the first available server
- Give preference to servers belonging to the selected group
- Only use servers belonging to the selected group
- Run at origin site



Once you have entered all of the necessary information, click the Schedule button in the lower right corner of the window. The status will be displayed:

	Instance Time	Title	Run By	Parameters	Format	Status
	Nov 23, 2010 10:42 AM	Budget Status	Frieda Falcon	2011; 02 - August; 010100	PDF	Success
	Nov 23, 2010 10:40 AM	Budget Status	Frieda Falcon	No Parameters	Crystal Reports	Failed

## Edit a Recurring Schedule

In order to change a previously scheduled recurring report, follow these steps:

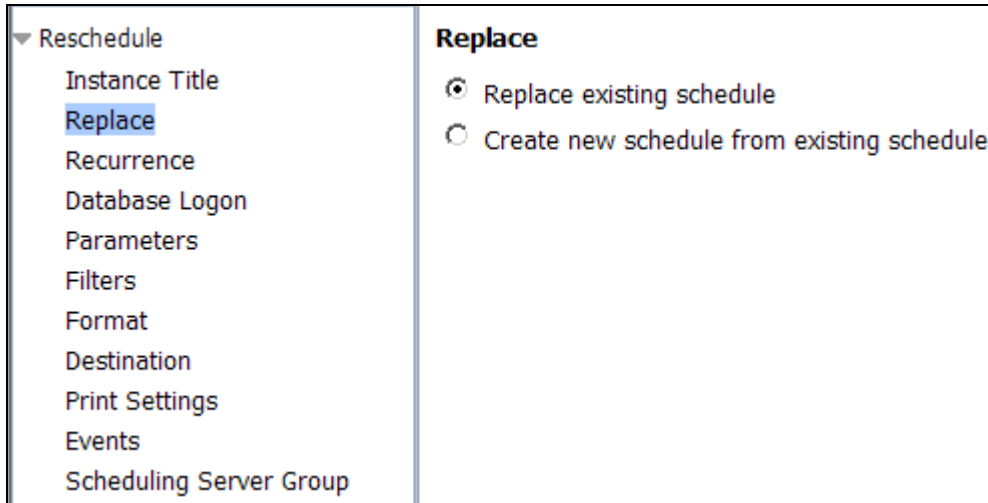
1. Pause the report that you wish to change. Highlight the recurring report while viewing it in history. Click on Actions in the menu above the list of reports. Select Pause.

Actions		Organize			Title	Run By	Parameters	Format	Status
	Pause			56 PM	Budget Status	Freddie Falcon	2011; 12.00; 010100	PDF	Success
	Resume								
	Reschedule								
				Dec 6, 2010 1:53 PM	Budget Status	Freddie Falcon	2011; 12.00; 010100	PDF	Recurring
				Dec 6, 2010 1:46 PM	Budget Status	Freddie Falcon	2011; 12.00; 010100	PDF	Success
				Dec 6, 2010 12:05 PM	Budget Status	Freddie Falcon	2011; 12.00; 010100	PDF	Success

2. Again, open Actions and navigate to Reschedule

Actions		Organize			Title	Run By	Parameters	Format	Status
	Pause								
	Resume								
	Reschedule			2:57 PM					
				May 31, 2011 12:55 PM					

- You'll notice that there is a new option in the menu on the left hand side of the screen. Click the Replace option. You can either use the current schedule as a template for a new schedule or completely replace the current schedule with options.

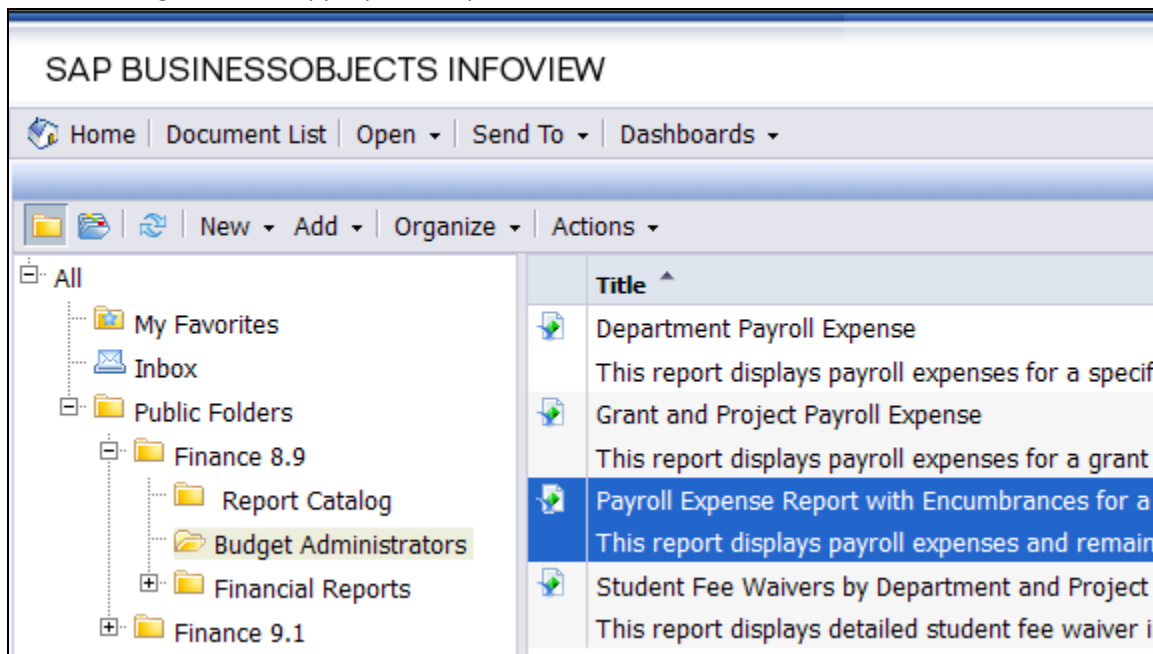


- Make the necessary changes and click Schedule to finish the process.

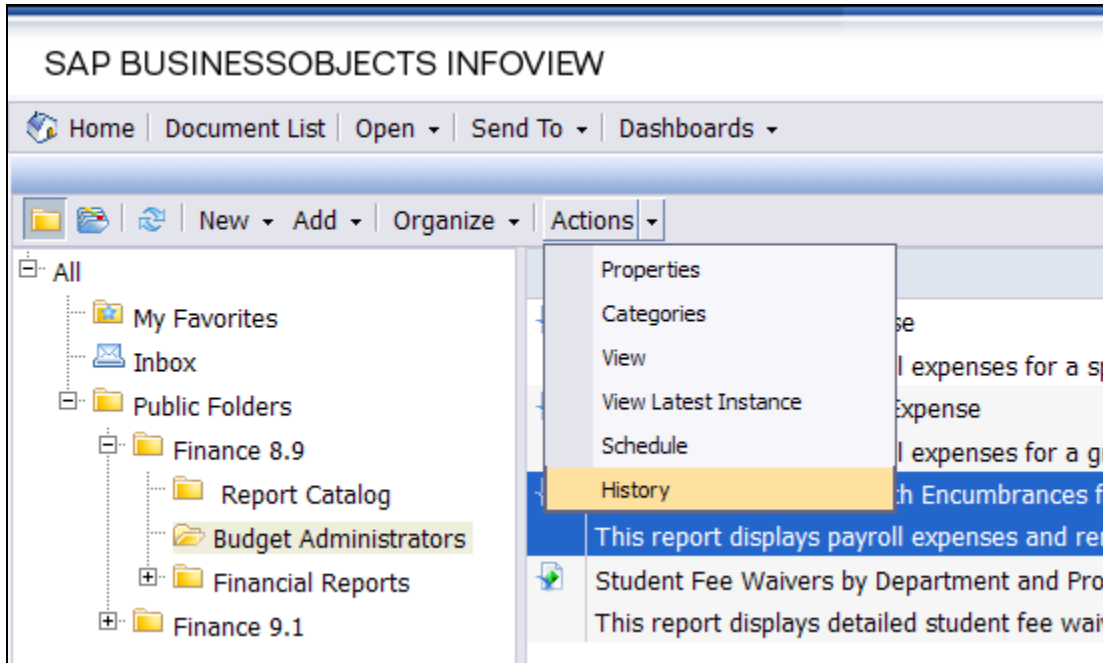
## Delete a Recurring Schedule

In order to delete a recurring schedule, follow these steps:

- Navigate to the appropriate report



2. With the report highlighted, click on Actions in the menu bar and select History.



3. Highlight the item that you want to delete.

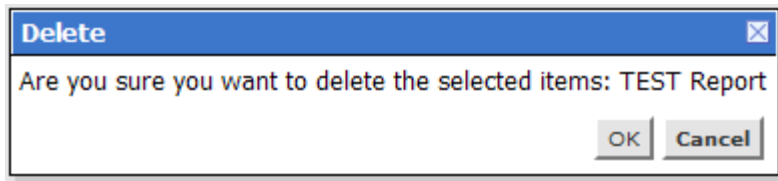
	Instance Time	Title	Run By	Parameter
	Jul 11, 2011 10:54 AM	TEST Report	Freddie Falcon	005100
	May 23, 2011 10:17 AM	Payroll Expense Report	dmswain	010100

4. Click Organize and select Delete

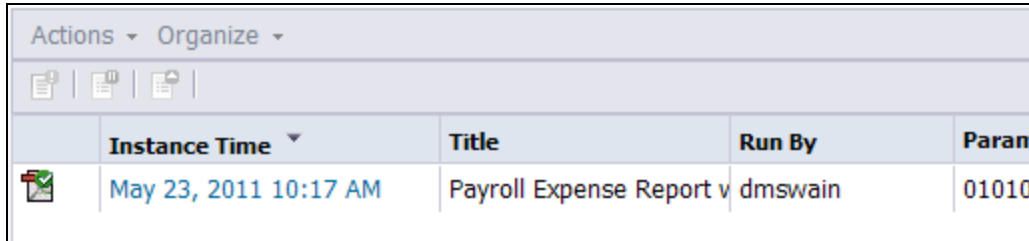
	Instance Time	Title	Run By	Parameter
	Jul 11, 2011 10:54 AM	TEST Report	Freddie Falcon	005100
	May 23, 2011 10:17 AM	Payroll Expense Report	dmswain	010100

The screenshot shows the 'Organize' dropdown menu open, with the 'Delete' option highlighted in yellow.

5. You'll see a warning message asking if you really want to delete the item.



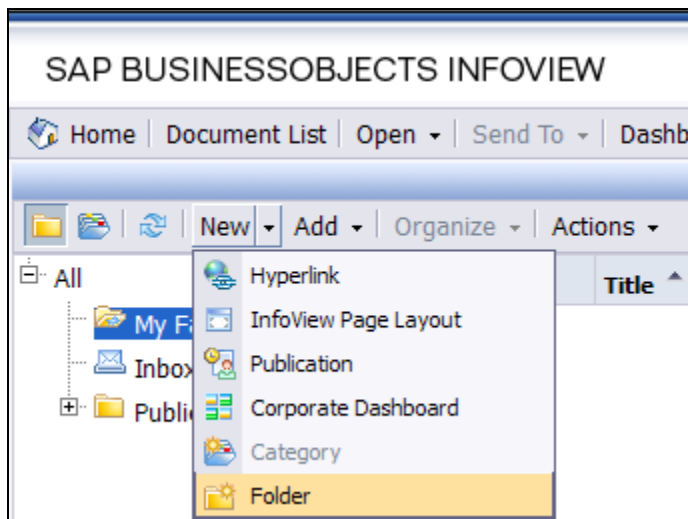
6. Click OK and the item will be deleted.



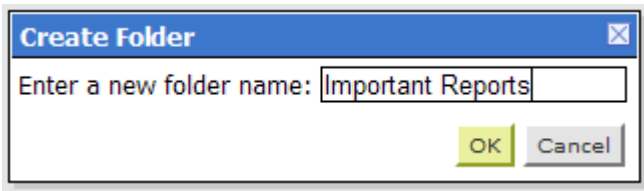
## My Favorites

The My Favorites option allows you to add shortcuts to commonly used reports. First, you have to create a folder or folders into which you will put your shortcuts.

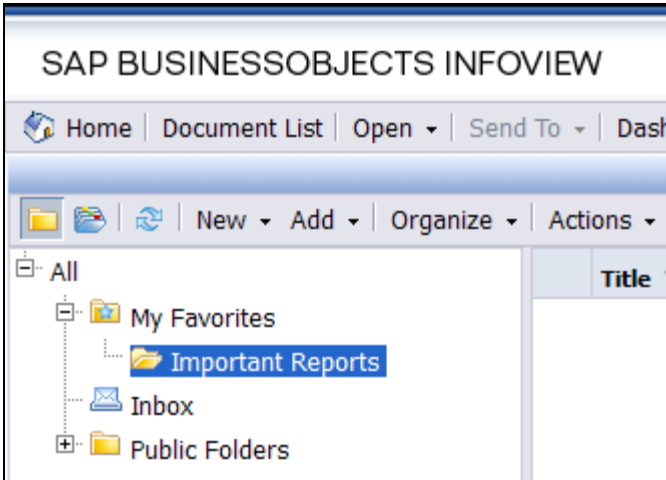
1. In the Workspace Panel, click on My Favorites
2. Click on the New button in the menu bar.
3. Navigate Folder



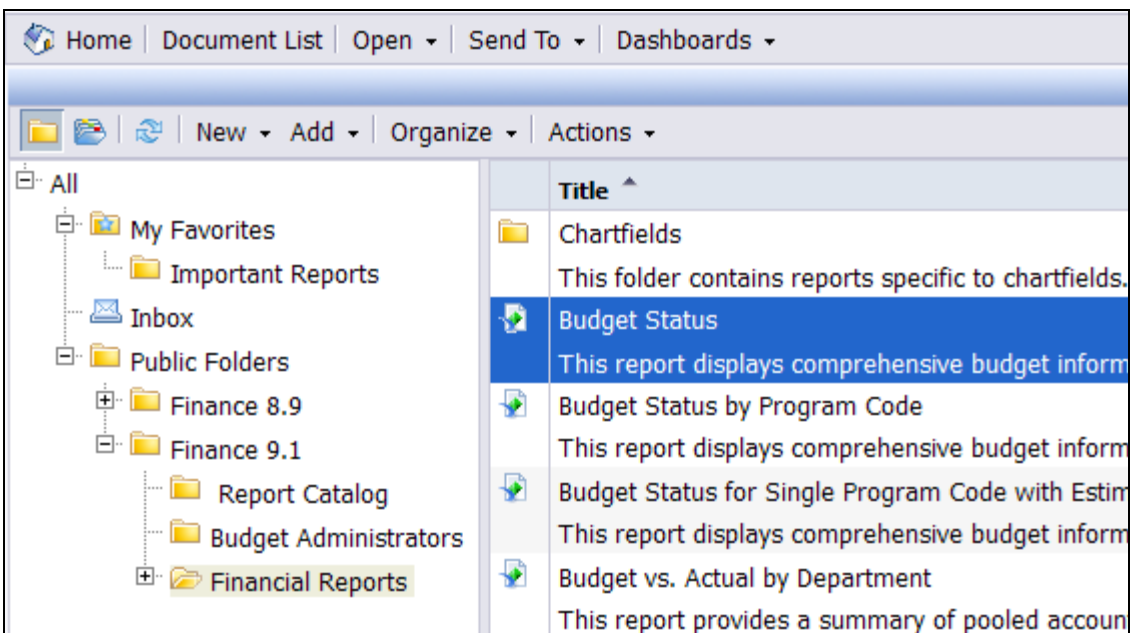
4. Enter the name of your folder and click OK



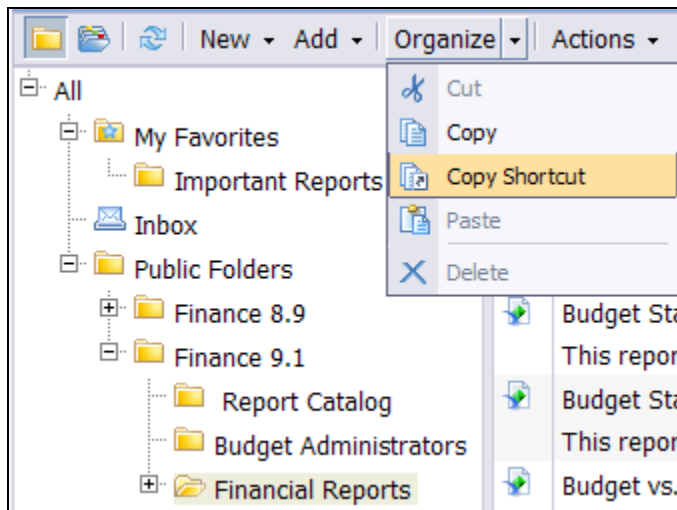
5. The new folder now shows up under My Favorites



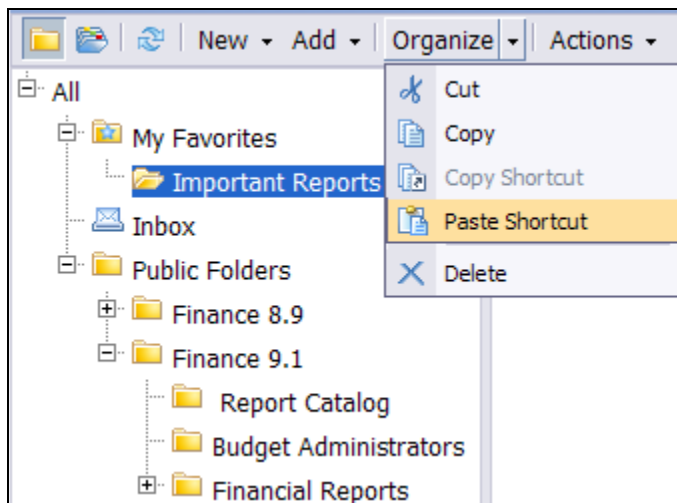
6. Navigate to the desired report under the Public Folders.



7. Highlight the desired report.
8. Click Organize and navigate to Copy Shortcut.



9. Highlight the folder that you created within My Favorites.
10. Click on Organize and navigate to Paste Shortcut



11. The shortcut now appears in your favorites

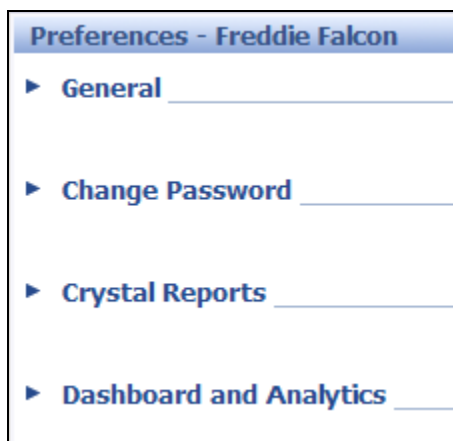
## Preferences

Preferences determine how you log on to InfoView and what view is displayed when you do. They also determine specific settings for the various objects that you view.

Some of our choices (such as our login criteria) are controlled at the server level and are not editable preferences.

### Setting your preferences

On the Header panel toolbar, click **Preferences**. There are 4 main topics within the Preferences:

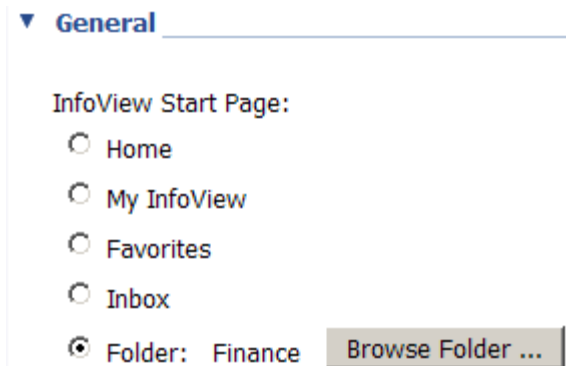


### General

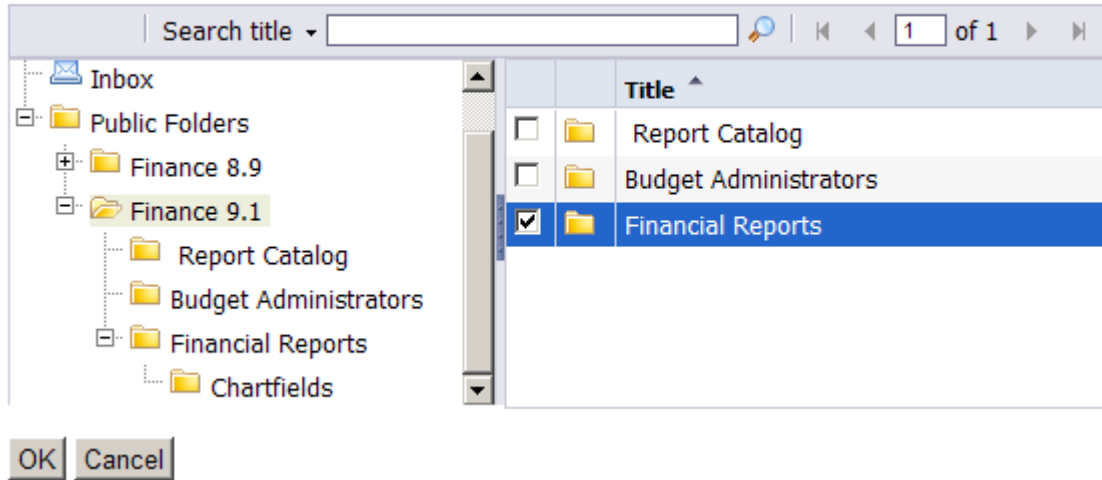
In the General section, you can select the page that you want to set as your Start Page. For example, if you choose Favorites, then the Favorites folder is automatically displayed on the Workspace panel the next time you log on.

Some recommendations:

1. Set the InfoView Start Page to the folder that you most commonly access.



Select a folder:



2. Set the number of objects (max.) per page to 100. This will mean less page scrolling.

Set the number of objects (max.) per page:

3. For Document Viewing, we recommend “In multiple full screen browser windows, one for each document.” This will open each report in a different window, allowing you to run multiple reports at a time.

Document Viewing:

- In the InfoView portal
- In a single fullscreen browser window, one document at a time
- In multiple fullscreen browser windows, one window for each document

## Password

Your user name and password for the WRL is controlled via the BGNet LDAP system. This service is provided to allow for easier login and more secure access to data. It is not recommended that you change your password from within InfoView.

## Crystal Reports

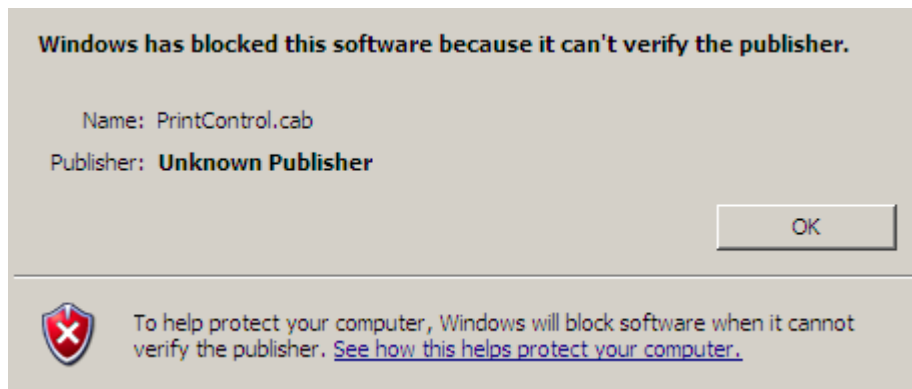
Defaults have been selected by the System Administrator to provide the best possible performance. It is recommended that you should not adjust these settings except for the following:



## Printing Preferences

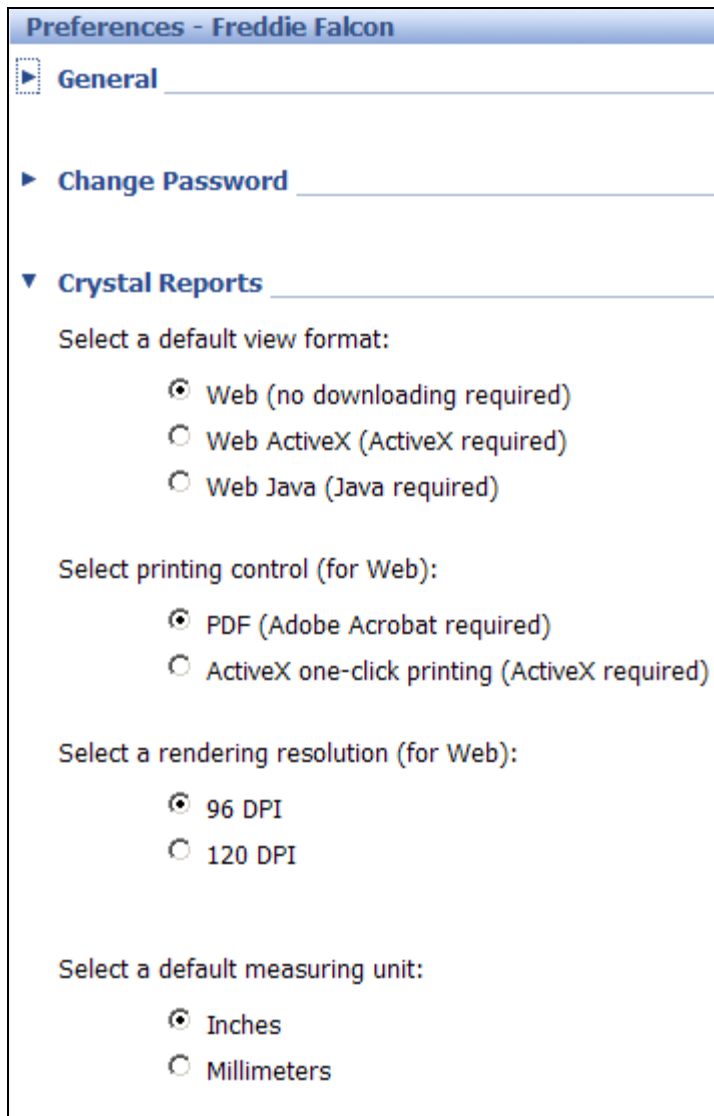
It has been reported that there is an error that can appear when trying to print via InfoView using Microsoft Internet Explorer. This error is part of a known bug within InfoView. Although this issue will be corrected in a future service pack addition to the software, it is not currently available. However, we have a simple work around.

The error message looks like this:



Follow these steps to correct it:

1. Log into InfoView and go to Preferences
2. Scroll down to Crystal Reports and click on the arrow to expand



Preferences - Freddie Falcon

▶ General

▶ Change Password

▼ Crystal Reports

Select a default view format:

- Web (no downloading required)
- Web ActiveX (ActiveX required)
- Web Java (Java required)

Select printing control (for Web):

- PDF (Adobe Acrobat required)
- ActiveX one-click printing (ActiveX required)

Select a rendering resolution (for Web):

- 96 DPI
- 120 DPI

Select a default measuring unit:

- Inches
- Millimeters

3. Under “Select printing control (for Web):”, select **PDF (Adobe Acrobat required)**
4. Click OK to save and close

### Dashboard Analytics

InfoView provides a rudimentary tool for dashboards and analytics. The Information Repository Team is in the process of developing a more robust set of tools for the upper administration.

## My Inbox

The internal InfoView inbox is used as one of several different destinations for scheduled reports. Clients can send reports to themselves for later viewing. It cannot be used as a typical email inbox.

Clients wishing to share report instances with other clients (either internal to or outside of the WRL) have the option of sending instances directly to that person using their BGNet username. **NOTE:** It is the client's responsibility to ensure that data is shared appropriately and safely. If you aren't sure, don't share it.

## More Help

Find lots of helpful information here:

[FMS 9.1 Reports – Web Report Library web page](http://www.bgsu.edu/offices/cio/psupgrade/v9.1/fms/page95406.html)

<http://www.bgsu.edu/offices/cio/psupgrade/v9.1/fms/page95406.html>

[FMS 9.1 Documentation](http://www.bgsu.edu/offices/cio/psupgrade/v9.1/fms/page93292.html)

<http://www.bgsu.edu/offices/cio/psupgrade/v9.1/fms/page93292.html>

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