Business Objects InfoView Quick-start Guide

Last Modified: 02/14/2008

The latest PDF version of this document can be found at http://www.cpfoundation.org/docs/finance/BOEInfoViewQuickStart.pdf

Business Objects Enterprise (**BOE**) is the "back end" application that allows the viewing of Crystal Reports through a web browser. **InfoView** is the name of the web application used to run, view, and schedule reports online. To keep it as simple as possible, we are simply referring to the whole package as "BOE".

BOE is used to view accounting and HR/PY data processed and stored in our IFAS system. Many of the reports you are familiar with from IFAS have been re-written in Crystal Reports and are now available via BOE.

Internet Explorer Settings

Depending on your operating system and how your computer is configured, you might receive some security warnings from Windows XP or Internet Explorer when you run InfoView. You can avoid potential problems by adding the Business Objects server, which is called fdnreports, as a trusted site in Internet Explorer. To do this:

1. Open Internet Explorer
2. Choose Tools > Internet Options > Security > Trusted Sites > Sites
3. Add https://fdnreports.calpoly.edu as a trusted site and click "Add"
    a. Don't forget the "s" on the "https"
4. Click Ok
5. Click Ok

Mac Users

BOE does not work with newer versions of Safari. If you are using a Mac, the only supported browser is Firefox.

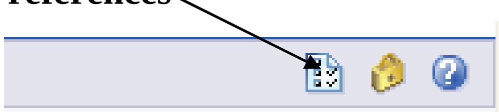
Logging into InfoView

PC users should use Internet Explorer to access InfoView
Macintosh users should use Safari. This is the only supported browser for Infoview on a Mac.

- Use the following URL: https://fdnreports.calpoly.edu to access the InfoView log in screen. Enter your username and password
    - For CPC employees – use the same username & password as you use to log on to your computer in the morning
    - For ASI and CPSU users, use the username and password provided to you by the CPC IT department when your account was created.

*If you experience any problems logging in, contact the CPC Help Desk at x65900

Preferences



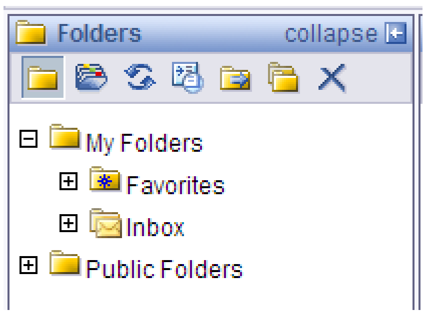
There are many settings you can change in InfoView, but briefly, here are a few you may find useful

- After clicking on the Preferences Icon
    - "My Initial View Is…." This is the screen InfoView will open to each time you log in.
        - Favorites
            - Your initial InfoView page will be your favorites tab – you will probably find this to be the most useful setting.
        - "The folder"

        - Click here & specify a folder you would like InfoView to start in
    - “View My Documents”
        - In the InfoView Portal
            - This is the recommended setting
    - “On my Desktop”
        - Change “Set number of objects per page” to 20
    - For the most part, leave the other four tabs in the Preferences window alone
        - Crystal Reports Preferences – don’t change these
        - Web Intelligence reports: we do not use this product
        - Password – this is only used if you are a University user, and wish to change your password.
- Make sure you click on the “Apply” button and then “OK” after you make changes so they will be saved.

Navigating Reports in InfoView

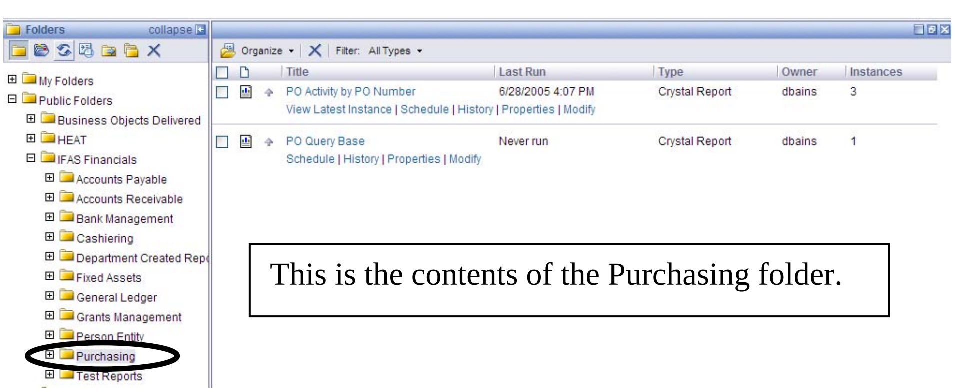
In InfoView, the left side of your screen will show a navigation tree consisting of folders. Which folders you see will depend on your security. At a minimum, you will always have the following:



- The “Favorites” folder is user configurable; use it to place shortcuts to frequently run reports.
- The Inbox can be used to receive reports from other users
- Public folders – this is where the Financial and HR/PY reports that IT have written are located.
    - There are separate folders for HR/PY and Financial reports. You may not have access to both.

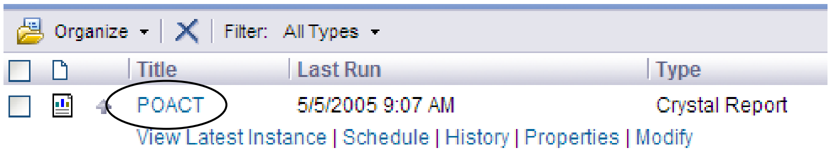
Open folders by clicking on the “+” next to them. The sub folders will then be displayed below, like this:

At the subfolder level, click on the folder name, and the reports in that folder will appear in the right hand pane of InfoView, like this:



This is the contents of the Purchasing folder.

Running/Viewing Reports

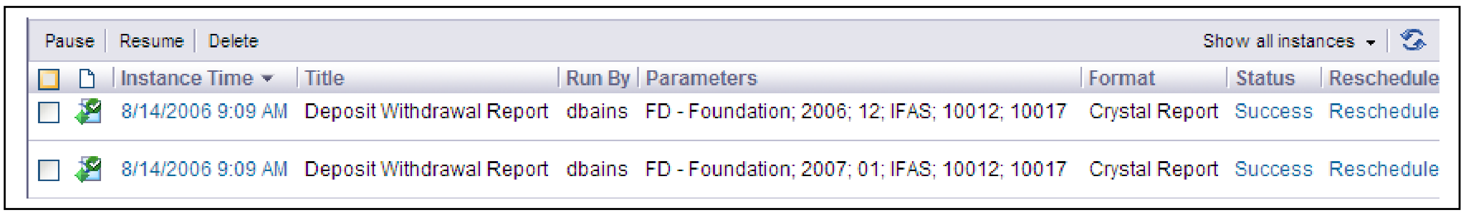


    - On demand means you are requesting up to date data; the latest data will be used when the report is generated.
    - Responding to prompts
        - Any prompt that is highlighted in yellow indicates that it is a "smart prompt." Smart prompts will generate a list of pick values as soon as you start typing in the field. For example:
            - In a prompt for "fiscal period," typing "m" will bring up a list that includes March and May. Typing "01" will bring up July.
            - Once the value you want to use is highlighted, you can tab out of the field to accept the response.
            - Use the calendar control when possible to avoid date formatting problems
        - Respond to all prompts & click OK
        - A New window will open and your report will appear once it has completed.
- To run the same report again with different parameters
    - Close the report you just ran, change the parameters, and run the report again ***or***
    - Click on the InfoView tab on your toolbar, change the parameters, and run the report again.
        - This method will keep your first report window open so you can compare the two

- **Scheduling Reports**
    - When you click on Schedule, you will have a set of questions you must answer to run a report, **but, as a basic practice, you'll only need to set "When" and "Parameters"**
        - **When** – specifies when you want to run a report.
            - If you choose 'Once', for example, you will be prompted to enter a date & time
        - **Destination**
            - Generally, leaving the default value of "Default Enterprise Location" gives you the most flexibility when the report has completed, and ensures that row level security is maintained.
                - BOE can email the report or a link to the report once it is complete – see "Emailing BOE Reports" later in this guide.
        - **Format**
            - While you can choose an alternative to the default "Crystal Report," leave this alone for now. If you run the report in Crystal Report format, you can always export it in any format you want later.
                - Scheduling a report to be emailed is an exception to this rule. In this case, you will most likely choose "Adobe Acrobat" or "Microsoft Excel." This is covered in the advanced topics section of this guide.
        - **Print Settings**
            - You can schedule a report to automatically print once it has completed running, but the setup can be tricky, and it is probably best to just schedule the report, preview the results, and then print the report. This way you won't waste any paper printer a report that did not contain the data you were looking for.
        - **Server Group**
            - We currently do not use server groups, so ignore this section.
        - **Parameters**

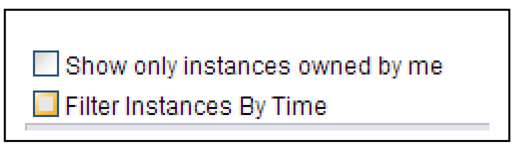
        - When you click on the + sign next to parameters, you’ll get a list of all the parameters needed for a report.
            - Click on the current value for the parameter or the word “empty” for each parameter, add or change the value, then click OK
    - When you are done with scheduling parameters, click “Schedule”
    - Once you have clicked “Schedule,” you’ll be taken to the History page, where you can see the status of your newly scheduled report
    - Click on “Refresh” to update the status of your running report

- **History**
  - When you click on “History” you’ll be taken to the History screen. Here you’ll see all the instances of the report, as well as currently scheduled reports.
  - An instance is a previously scheduled run of a report that already contains data. On Demand reports do not create instances; only scheduled reports do.
  - When you click on an instance to view it, it does not re-run the report; it shows the data as it was requested for that particular run
    - It will show the report for the parameters specified at the last run
    - If you did not schedule the report, row level security may prevent you from seeing any data



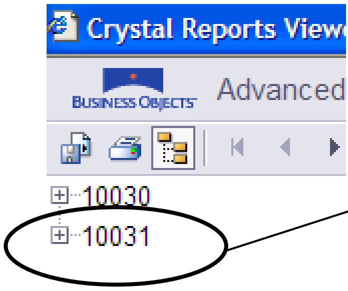
		Instance Time	Title	Run By	Parameters	Format	Status	Reschedule
		8/14/2006 9:09 AM	Deposit Withdrawal Report	dbains	FD - Foundation; 2006; 12; IFAS; 10012; 10017	Crystal Report	Success	Reschedule
		8/14/2006 9:09 AM	Deposit Withdrawal Report	dbains	FD - Foundation; 2007; 01; IFAS; 10012; 10017	Crystal Report	Success	Reschedule

  - You can choose to only view your instances by checking the “Show only instances owned by me check box at the top of the History window:



  - With the exception of GL Month End reports, all instances are deleted from the system after 7 days.
- **View Latest Instance**
  - Clicking the “View Latest Instance” label will show you the instance from the last report that was run
    - Depending on the report – this may not be useful to you, as the parameters used for the last instance may not be relevant.

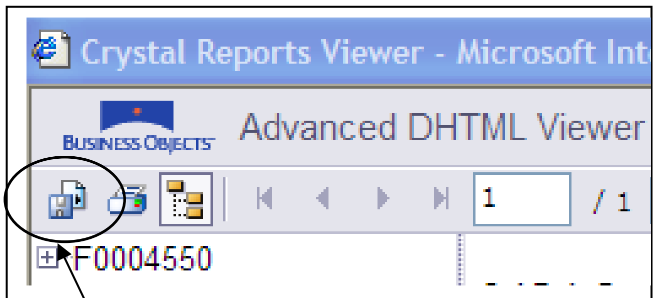
- **Viewing reports that have “Groupings”**
  - Some reports will be structured to have group totals. These reports will have a “Group Tree” that will appear in the left hand frame when you are viewing a report.



- Clicking on one of these group values will take you directly to that section of the report.
- Some groups will have sub groups. In that case, clicking the plus sign next to the group name will show the sub group. You can then click on the sub group to jump directly to that section of the report.

Exporting reports to other formats

Once a report has been run on demand or scheduled & completed, the resulting data can be exported to other formats



On any report output window, click here to start the export process

- Choose a file format
    - Excel 97-2000 results in a report that looks exactly the same as the onscreen report
    - Excel 97-2000 data only results in a spreadsheet version with columns & rows
- Choose a page range & click ok
- If you are exporting to excel, you will be prompted to “Open” or “Save” the report
    - If you choose Open, Excel will open with the report
        - You can then save the spreadsheet
    - If you choose Save, you’ll be prompted for a location to save the file

Printing Reports

Once you have run a report, either by viewing it on demand or by scheduling it, printing is simple. However, the way in which reports print is slightly different between Windows and Macintosh users, so please read on. In all reports, at the top left corner, you’ll see the printer icon:

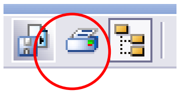
Windows Users

Clicking on the printer icon will bring up the standard Windows printing dialog box. You can choose which printer you would like to use, and which range of pages you would like to print.

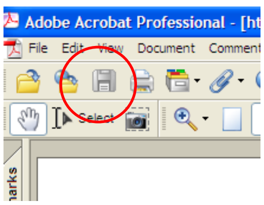
**Note*: The very first time you print, you will be prompted to install an Active-X printer control. You will only get this the first time you print. Allow the system to install the printer control and you will be taken to the printing dialog box once it’s complete.

***Update:** A problem has arisen lately with CPSU (State Employee) computer users. The problem is that many of these employees may not have sufficient privileges to install the ActiveX print control needed to print the reports from the BOE system. There are two ways to deal with this. One is a work around, and one is permanent solution:

- **Work around:**
    - Instead of using the print icon in the upper left, use the "Export this report" icon (the disk icon just to the left of the printer icon).

    - For File Format, choose "Adobe Acrobat (PDF)" and click OK.
    - At the File Download prompt, click Open.
    - At this point the report has opened in Adobe Acrobat and you may print the report from here, using the print icon within the Adobe PDF viewer

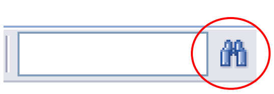
- **Permanent Solution:**
    - Your local LAN coordinator (or whoever manages your computers) can do one of two things:
        1. Temporarily elevate your privileges on your PC to “Administrator” until you log into BOE, run a report and then print it. Doing this will allow the ActiveX control to be installed
            - After successfully printing the report, your security level can be changed back to what it was originally.
        2. Your LAN coordinator could log into your pc as an administrator, and then allow you to log into BOE with your user ID, run a report and print it. Then the LAN coordinator could log out and have you log back onto your PC as yourself.
            - This will allow the ActiveX control to install
    - Regardless of which method is chose, once the ActiveX control is installed on your pc, it should work for anybody who uses it.

Mac users

Macintosh computers do not use the Active-X printer control. When printing from a Macintosh, the report will automatically be exported to Adobe Acrobat. Once in Acrobat, you can print the report normally, using File > Print from the Acrobat menu.

Searching in reports

You can search the contents of a report for things like key words and numbers after it has run, but it can be a bit cumbersome. To search a report, enter a word or number to search for in the search box, then click on the binoculars to initiate the search.



If the report contains multiple occurrences of the word or number you are searching for, you’ll have to scroll back to the top of the page, and click on the binoculars again to continue the search.

As an alternative, **export the report to PDF**, then, use the search functionality within Acrobat Reader. This works very well, and can help you find specific data in a lengthy report. A caveat to searching in Adobe though: Adobe treats everything as text strings. So, to search for the dollar amount of 7,135.35, you must type the number with commas and decimal places in the search box. If you simply type 7135.35, Acrobat will not find the number, as it is checking for exact matches.

Adding reports to your "Favorites"

You can add any report to your "Favorites" folder. To do so:

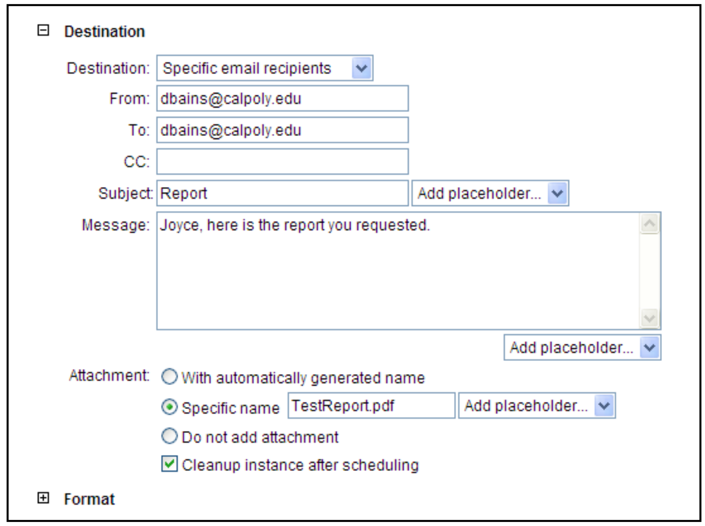
- Navigate to any report
- Check the box next to the report name
- Click on the "Organize" drop down
- Choose "Add to my Favorites"
- Click on the "Favorites" folder, or a subfolder you have created
- Click "Ok"

Advanced Topics

Emailing BOE Reports

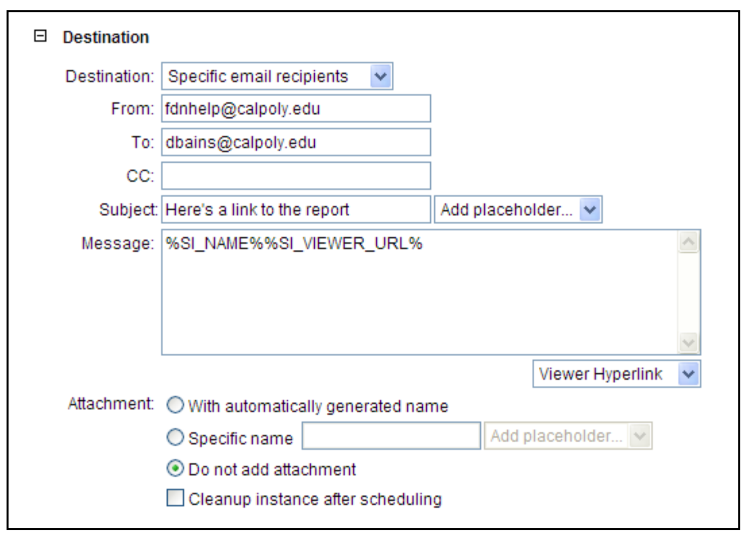
You can schedule a BOE report and have the resulting Instance emailed in two different ways.

☐ **To schedule a report so an actual copy of the report is emailed to a recipient, setup the destination area as follows:**



1. Choose “Specific email recipients” in the Destination drop down box
2. Enter your email address in the From box
3. Enter a valid email in the To box
4. Enter an appropriate subject line
5. Enter a message, if desired
6. **6.** Choose “with automatically generated name” **or** “specific name”
   - **a.** If you choose “specific name” you **must** enter the correct file extension for the format you will be choosing: .pdf, .xls, etc. – you’ll choose the format later.
   - **b.** If you choose “automatically generated name” the correct file extension will be added for you, but the report name will be a system assigned series of numbers & letters.
7. **7.** Check the “Cleanup Instance after scheduling.”
   - **a.** This will automatically delete the instance after it has been emailed.\
8. **8.** In the “Format” section, choose a format other than “Crystal Report”

☐ **To schedule a report and have BOE email a link to the instance, setup the destination area as follows:**



1. Choose “Specific email recipients” in the Destination drop down box
2. Enter your email address in the From box
3. Enter a valid email in the To box
4. Enter an appropriate subject line
5. Enter a message, if desired, and select “Viewer Hyperlink” from the “Add Placeholder” drop down box.
6. Leave the “Do not add attachment” radio button un-checked
7. Make sure the “Cleanup Instance after scheduling” is un-checked
8. **8.** In the “Format” section, choose a format other than “Crystal Report”