

Business Objects Enterprise Application InfoView

Business Objects' Crystal Report Writer is now Maricopa Community College Districts official report generator. This state of the art reporting tool is accessed using the Internet.

When the new student system is implemented, there are several roles which will be given to Groups or Individuals based upon decisions made at specific colleges.

The roles or levels of access are:

1. No Access – does not allow users to view a report, but they are able the report name and properties
2. View – can view all instances that have been generated for person or group
3. Schedule – can view, delete, schedule, set parameters, generate objects (reports), add contents to a folder or copy an object or folder, and change formats and destination of reports, as well as database logon information
4. View on Demand – In addition to the rights of Schedule, can refresh data “on demand” against the data source
5. Full Control – Usually applies to a subset of folders/objects with administrative control without system administrative control. Can delete folders/objects/instances and modify properties including rights
6. Advanced – Allows role to be customized by granting, not specifying, or denying each Right.

There is additional capability given the correct access for roles to modify reports, including options to change the fields, groupings, filters, formulas, summaries (example: count), sorting, and the option to add a report chart or report template

The Administrative role is used to publish reports; change or assign the server, database, database drivers, and tables for a report; change or assign report parameter values; change or assign filters on a report; change print setup; change or assign report scheduling features, including scheduling the report to run for a specific person or group; and change or assign report rights. Different types of Administrators may or may not have all of these capabilities or rights to all reports depending upon their profile.

This document refers to the role “View”. Additional resources are located in “Documentation” and may be accessed on the Business Objects Screen (Figure 1).



Business Objects Enterprise Application InfoView

Viewing Reports or Objects

To view reports using the Business Objects Enterprise Application “InfoView”, you must have Microsoft Internet Explorer or Netscape installed on your computer. A person, who has View access, may only view instances of reports that are refreshed or scheduled by a person with the necessary access to complete these processes. Employees may have different access levels based upon rights given “Groups” that are associated with the individual or based upon rights given an individual to specific folders or reports.

Open Internet Explorer or Netscape and enter the URL for Business Objects, InfoView
<https://bidev01.maricopa.edu:8443/businessobjects/enterprise115/desktoplaunch/InfoView>

The following login screen is displayed:

Log On to InfoView

Welcome to BusinessObjects

Enter your user information and click Log On.
(if you are unsure of your account information, contact your system administrator)

System: BIDEV01.MARICOPA.EDU

User name: testuser

Password: ●●●●●●●●

Authentication: LDAP

Log On

Figure 2: Logon Screen

Enter your Enterprise ID (available in the Memo PAT tool) for user name and enter your MEMO Password as the LDAP password and verify that Authentication is set to LDAP. Then click on the Log On button and the screen (the same as or similar to) Figure 3 is displayed:

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Figure 3: Home

Navigating InfoView Screens

Public Folder will contain the folders that are available to you based on availability and your level of access in InfoView.

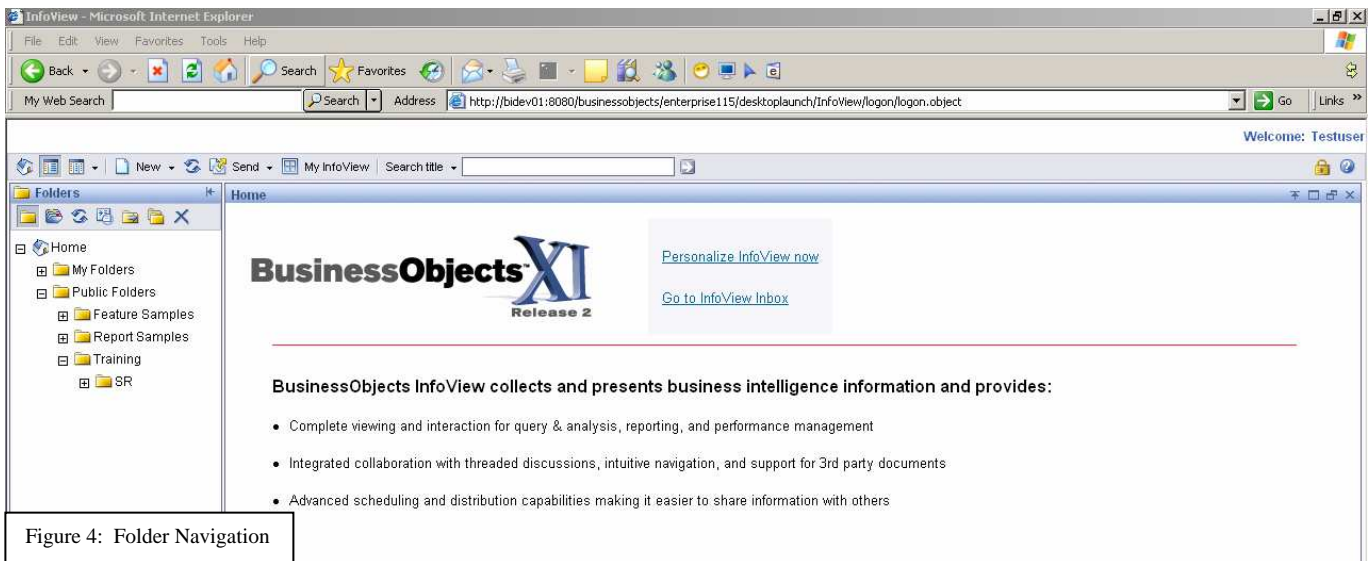


Figure 4: Folder Navigation

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By maximizing the box to the left of the folder, a list of available folders is displayed in the Folders pane (Figure 5).

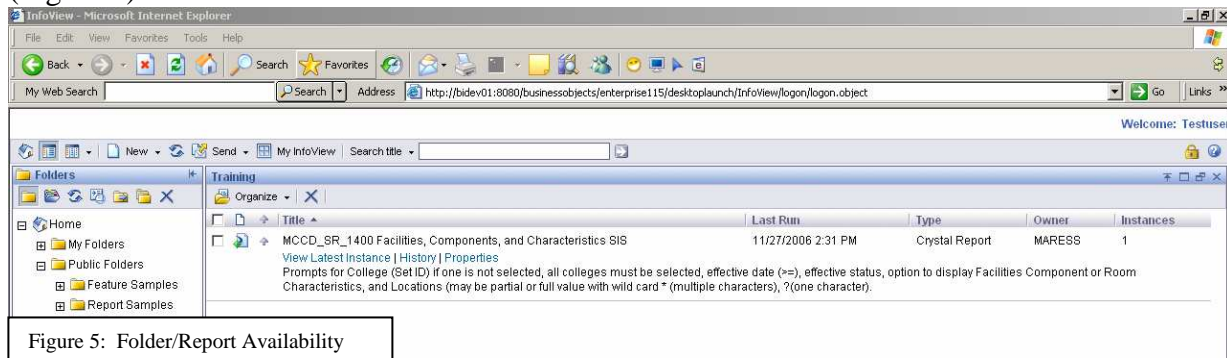


Figure 5: Folder/Report Availability

A folder may contain additional subfolders and reports. To see subfolders contained within a folder, click on the folder name, for example: Training. Notice the folder named SR. Also notice the folder objects (in this case a Crystal Report, MCCD_SR_1400 Facilities, Components, and Characteristics SIS) of the Training folder are displayed in the right pane under “Training”.

If a report is generated, as seen in Figure 4, there will be three options available based on the role “View”: “View Latest Instance |History |Properties”. If a report instance is not generated, only History and Properties will be available for viewing and the selection of “History” will indicate that the report has no completed instances.

1. To see more information about a report, select “Properties”. The report or object information will be displayed (See Figure 6):

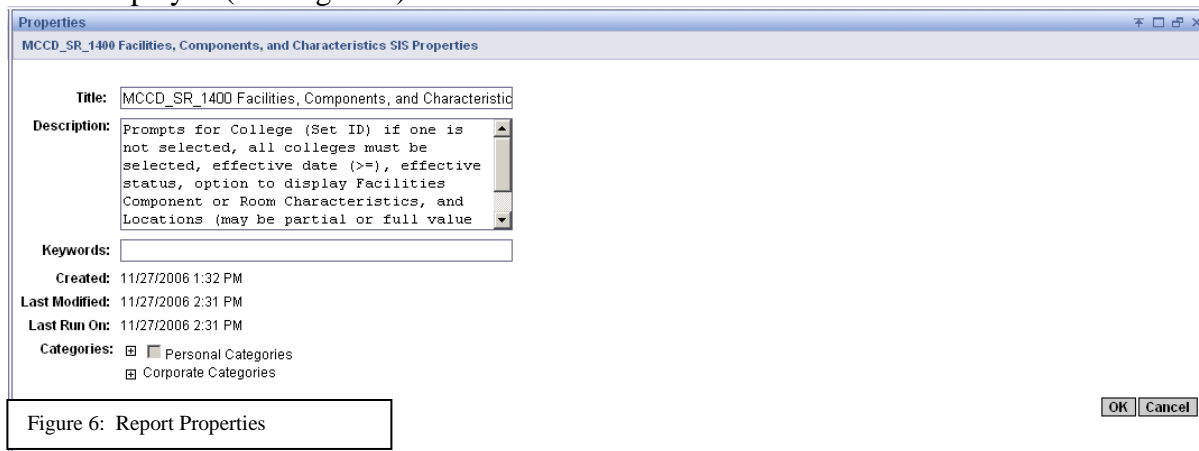


Figure 6: Report Properties

2. If an instance is available, one may view the latest instance by selecting the option “View Latest Instance” (See Figure 7):

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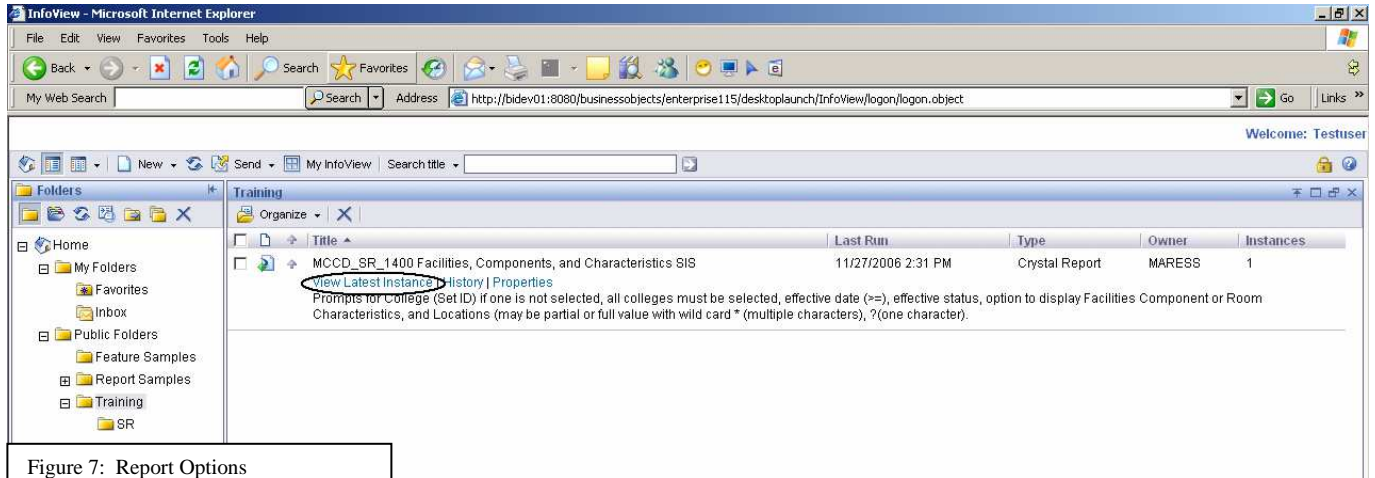


Figure 7: Report Options

If the report format is Acrobat Adobe (PDF), it will display as follows:

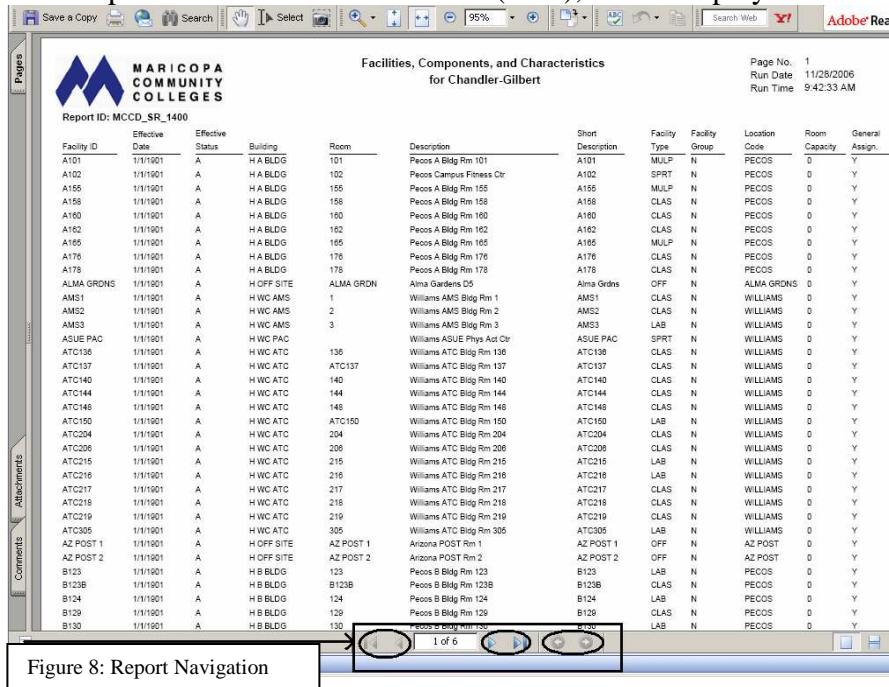


Figure 8: Report Navigation

One may navigate through the report by selecting the arrows to move forward or backward through the pages at the bottom of the report page (in the circles, in the box, as noted in Figure 8).

3. Otherwise, “History” may be selected and a list of instances will be displayed.

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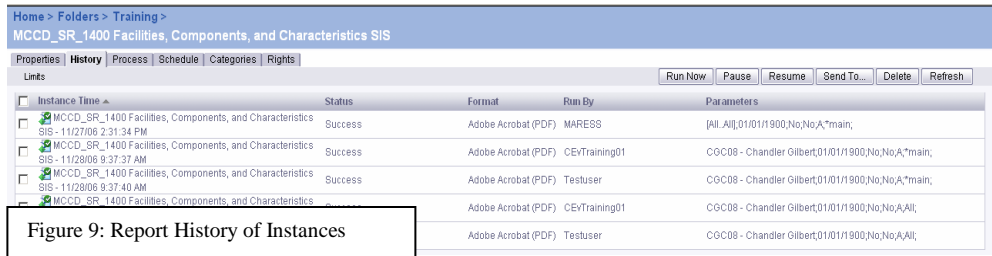


Figure 9: Report History of Instances

4. One can view the report instance by clicking on the Instance Time (See circle in the Figure 10):

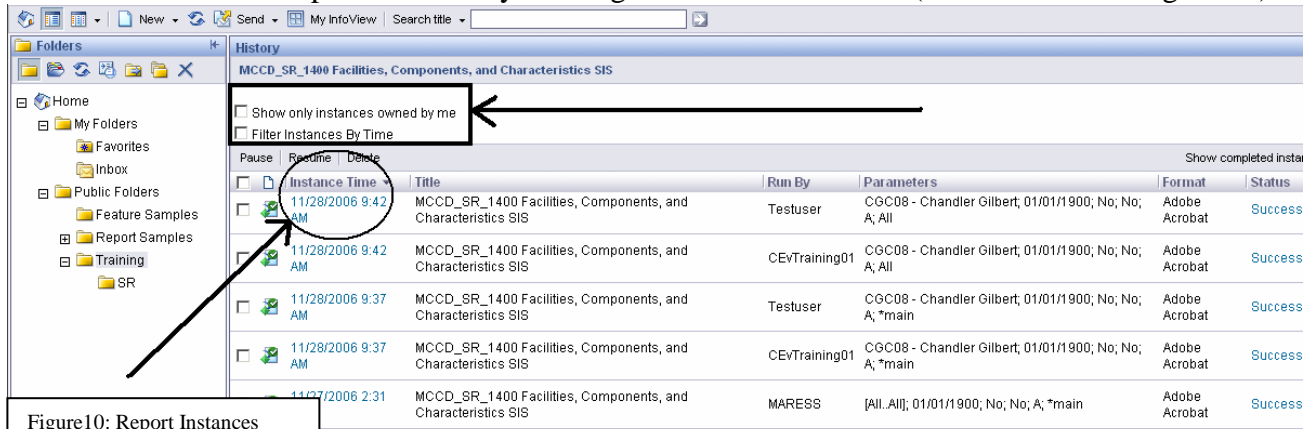


Figure 10: Report Instances

5. In addition, one may check either option: Show only instances owned by me or Filter Instances By Time.

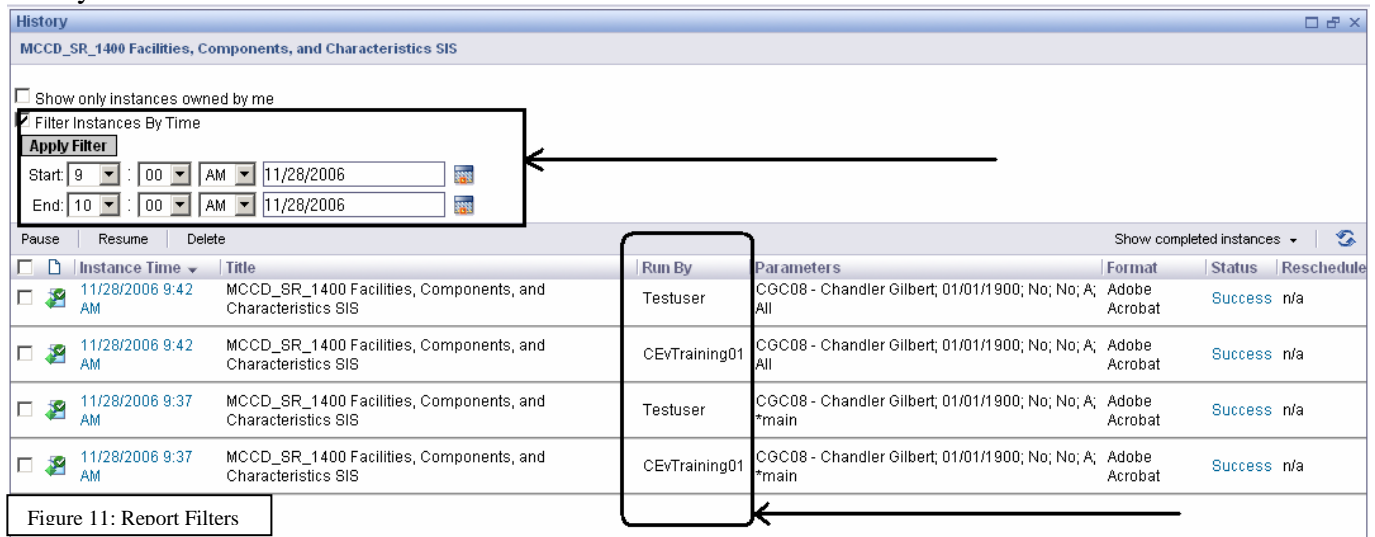


Figure 11: Report Filters

- When the Filter Instances By Time check box is selected, it is necessary to enter a start and end time and date. Then select Apply Filter in the box as noted in the previous screen print. Once this is entered, only the instances that meet the Instance time filter criteria will be available to view.
- If the “Show only instances owned by me” checkbox is checked, only the instances “Run By” that individual will be available to view (see rounded rectangle in Figure 11). Persons with scheduling

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access may run reports for others to view, but the person with access to view the report will see their own name in the “Run By” section.

Exporting/Saving or Printing a Report

When a report is viewed as in Figure 8 (above), the report may be saved (exported) in the following formats if it is generated using the Crystal Reports format, otherwise it can only be exported/saved/opened in the format that it is generated in.

1. Crystal Reports (RPT)
2. Adobe Acrobat (PDF)
3. Microsoft Excel 97-2000 (XLS)
4. Microsoft Excel 97-2000 – Data Only (XLS)
5. Microsoft Word (RTF)
6. Microsoft Word Editable (RTF)
7. Rich Text Format (RTF)

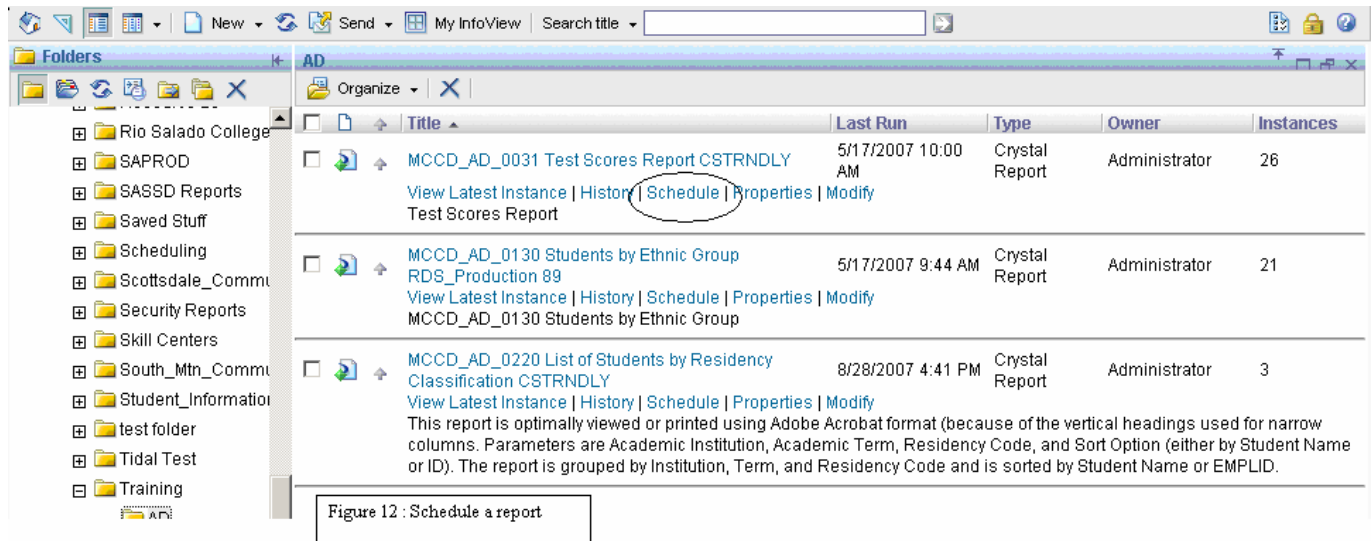
Some, but not all of the above formats will allow users to limit the range of pages exported. Select the Save Icon at the top left of the screen. Follow the instructions to save/export the report.

To print a report being viewed as in Figure 8, above, select the Printer Icon in the top left corner of the document. Select one of the options to print all or a limited selection of pages of the report. Printer Plug-Ins for the different format options may need to be downloaded if one is not available to print a report with.

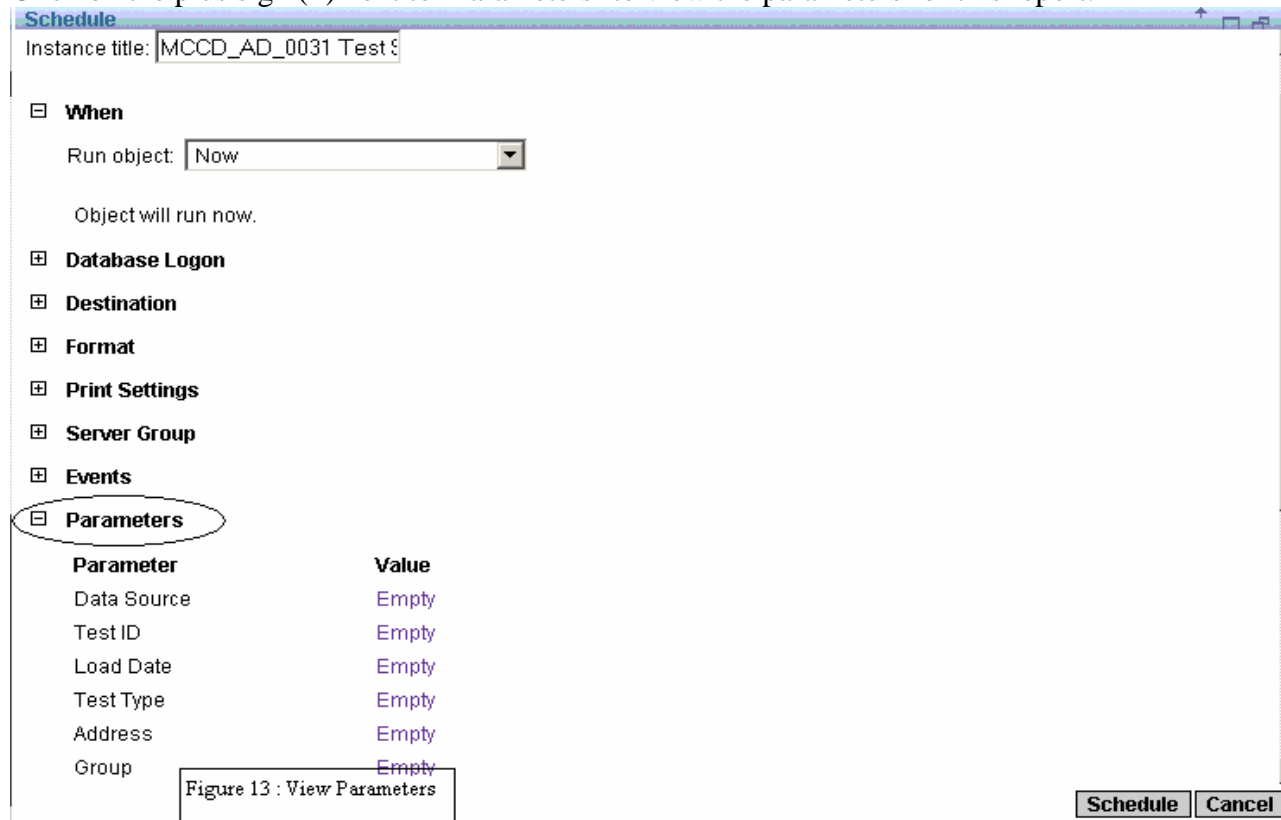
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Scheduling a Report

Pick an area (AD, CC, etc.) from the Public to view the reports available to you, and click on 'Schedule'.



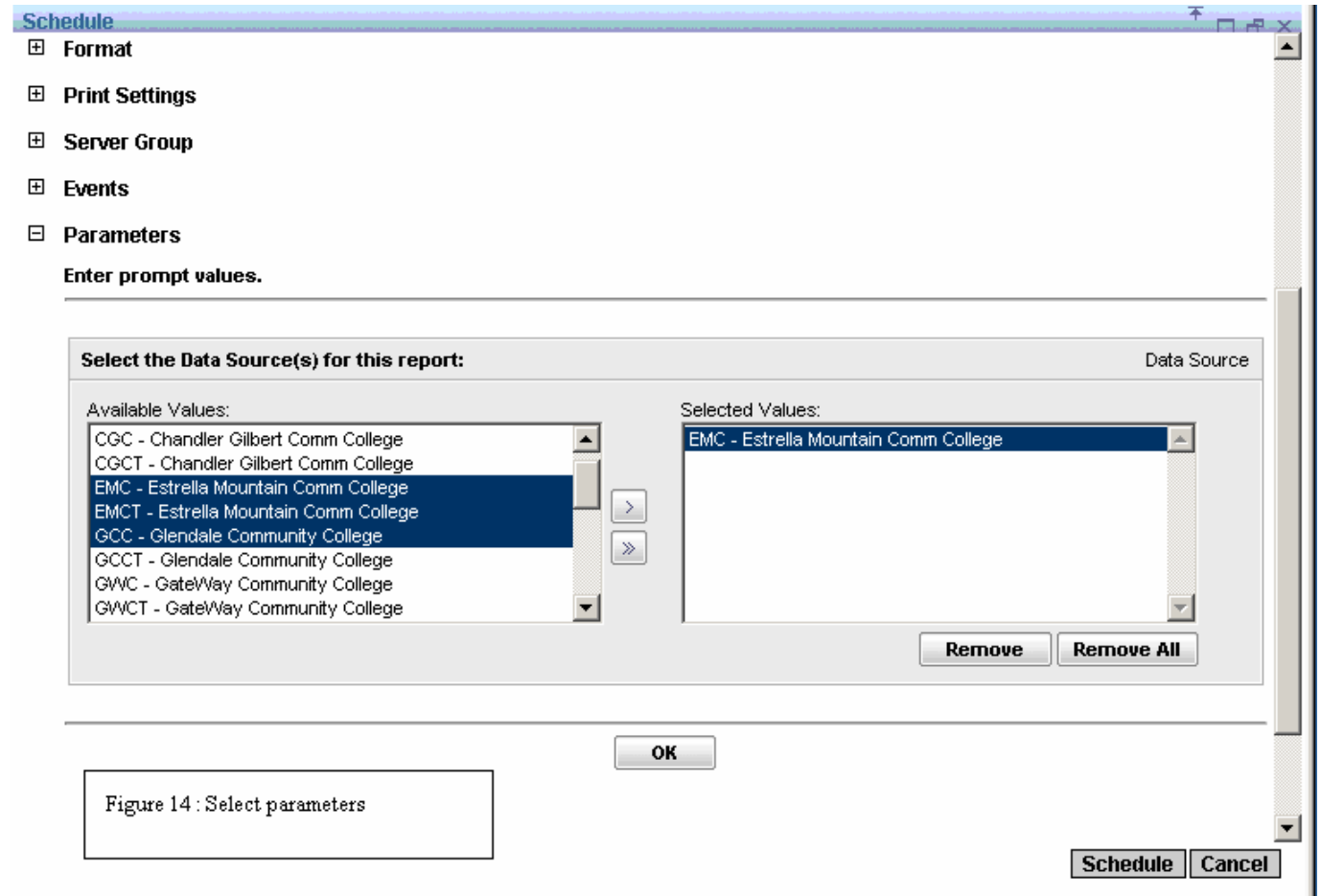
Click on the plus sign (+) next to 'Parameters' to view the parameters for this report.




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When you click on the value to the right of the parameter, a box will open up either showing the values that you may select from, or giving you a box that you may use to enter a value. In the example below, you may choose one or more values (to choose more than one value, hold down the shift key as you click on the values). Then move you chosen values to the right by clicking '>' (or move all choices by clicking '>>'). Use the 'Remove' buttons below if you have moved a value in error.

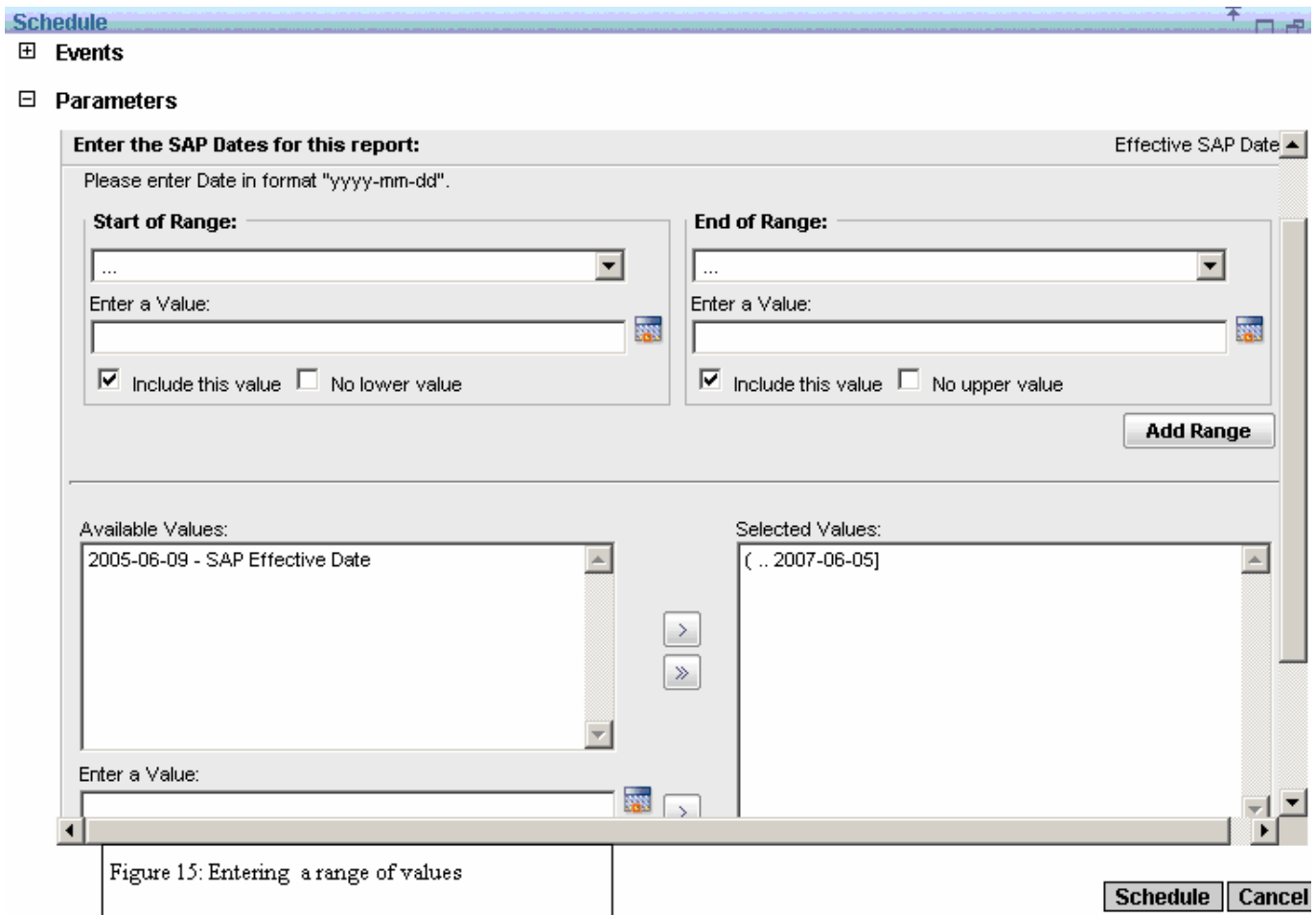
When you have completed your choices, make sure you have clicked 'OK' below the box. If you do not see the box, you may have to scroll down further to see it. If you do not click the 'OK' button, your choices will be lost.



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You may also encounter a choice for a range of values. This may be a range of dates or other types of values. For dates you will see a small calendar icon . If you click on this icon, you can choose your dates from a calendar. You may include only a lower or upper value. When you are done with your choice, you must remember to click the 'Add Range' button to move your choices into the 'Selected Values' box. You may also choose more values from the 'Available Values' box, or enter a value in the 'Enter a Value' box.

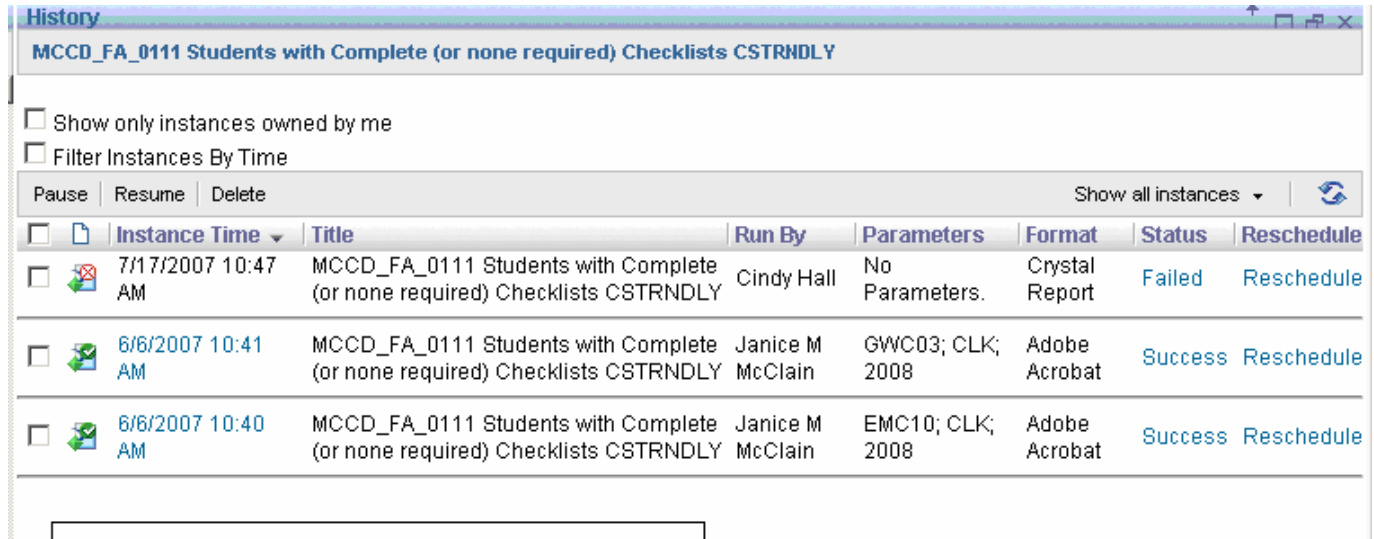
But again, make sure you have clicked 'OK' below the box. If you do not see the box, you may have to scroll down further to see it. If you do not click the 'OK' button, your choices will be lost.



When you have entered all the parameter choices, clicking on the 'Schedule' button will send the job to the scheduler to be run according to your choices.

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After you hit the 'Schedule' button, you will be taken to a page similar to this one. If the report has not yet started you will see 'Pending' under the Status. To see the most current status you can click on the 'Refresh' icon . If the report has been created successfully, you can click on the date hyperlink and the report will open. If the report has failed, as in this example, you may notice that no parameters were chosen. In that case you may go back and choose your parameters again.



The screenshot shows a window titled "History" for the report "MCCD_FA_0111 Students with Complete (or none required) Checklists CSTRNDLY". It includes filter options like "Show only instances owned by me" and "Filter Instances By Time", and action buttons "Pause", "Resume", "Delete", and "Show all instances". Below is a table with columns: Instance Time, Title, Run By, Parameters, Format, Status, and Reschedule.

Instance Time	Title	Run By	Parameters	Format	Status	Reschedule
7/17/2007 10:47 AM	MCCD_FA_0111 Students with Complete (or none required) Checklists CSTRNDLY	Cindy Hall	No Parameters.	Crystal Report	Failed	Reschedule
6/6/2007 10:41 AM	MCCD_FA_0111 Students with Complete (or none required) Checklists CSTRNDLY	Janice M McClain	GWC03; CLK; 2008	Adobe Acrobat	Success	Reschedule
6/6/2007 10:40 AM	MCCD_FA_0111 Students with Complete (or none required) Checklists CSTRNDLY	Janice M McClain	EMC10; CLK; 2008	Adobe Acrobat	Success	Reschedule

Figure 17 : Reviewing completed reports

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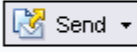
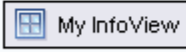

Appendix A – Infoview Icons

Below are screen shots of the Business Objects Enterprise Help document describing the Infoview icons and their uses.




BusinessObjects Enterprise XI Release 2 InfoView User's Guide

Header panel

The Header panel displays the logo and the user name of the account that you used to log on to InfoView. It has a toolbar that you can use to perform the following actions:

Option	Description
	Home Displays the InfoView home page.
	Toggle Navigation Shows/hides the Navigation panel.
	Toggle Encyclopedia Shows/hides the Encyclopedia panel.
	Create a new item Creates a new folder, category, or object.
	Refresh the Workspace Panel Refreshes the Workspace panel.
	Send a document Sends an object or instance to a destination.
	My InfoView Allows you to create custom dashboards.
	Search Allows you to search for objects.

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	Preferences Allows you to set how information is displayed.
	Log off Logs the user off.
	Help Displays the online help for InfoView.










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<http://support.businessobjects.com/documentation/>

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Navigation panel

The Navigation panel displays a tree that shows your place in the structure of folders or categories in InfoView. It has a toolbar that you can use to perform the following actions:



Option	Description
	Show folders Displays the available folders.
	Show categories Displays the available categories.
	Refresh the Navigation Panel Refreshes the Navigation panel.
	Properties Sets properties for the selected folder/category.
	Move Moves the selected folder/category.
	Copy Makes a copy of the selected folder/category.
	Delete Deletes the selected folder/category.



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Workspace panel

The Workspace panel displays the objects that are located in a folder or assigned to a specific category. It is in this panel that you do activities such as viewing, scheduling, and modifying objects, setting your InfoView preferences, and so on. It has a toolbar that you can use to perform the following actions:

Option	Description
 Organize ▾	Organize Allows you to organize the selected object.
	Delete Deletes the selected object.
Filter: All Types ▾	Filter Filters the types of objects that are displayed.



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