Page 1 – Web Intelligence – Setting Up Interactive Elements

The following lesson contains screenshots of the actual BusinessObjects 4.1 application, with text and narration explaining how to use BusinessObjects to perform certain functions.

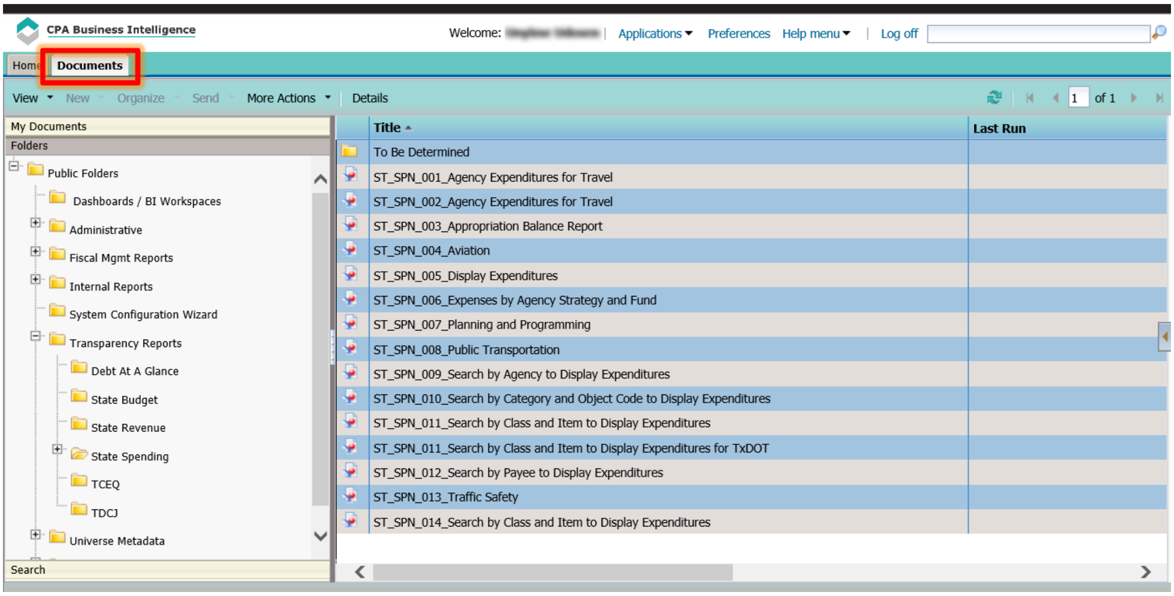
Please ensure that you are currently sitting at a computer that has sound playing capabilities and that the speakers are turned up to an acceptable volume.

When the narration has finished on a page, please press the [spacebar] to continue. If you would like to review a page, press the [backspace] key.

Page 2 – Schedule a Report

Scheduling reports to run automatically at specific times of the day lets you automate the process of refreshing your documents. You can also greatly reduce the run time by scheduling your reports to run during off-peak periods. Reports can be sent automatically to other users, or groups of users, in Web Intelligence format, or as Excel or PDF files.

Note: *Scheduling will not work for reports that have prompt values that need to change with each refresh. When building the schedule, you are required to enter the prompt values for all prompts in the report.*

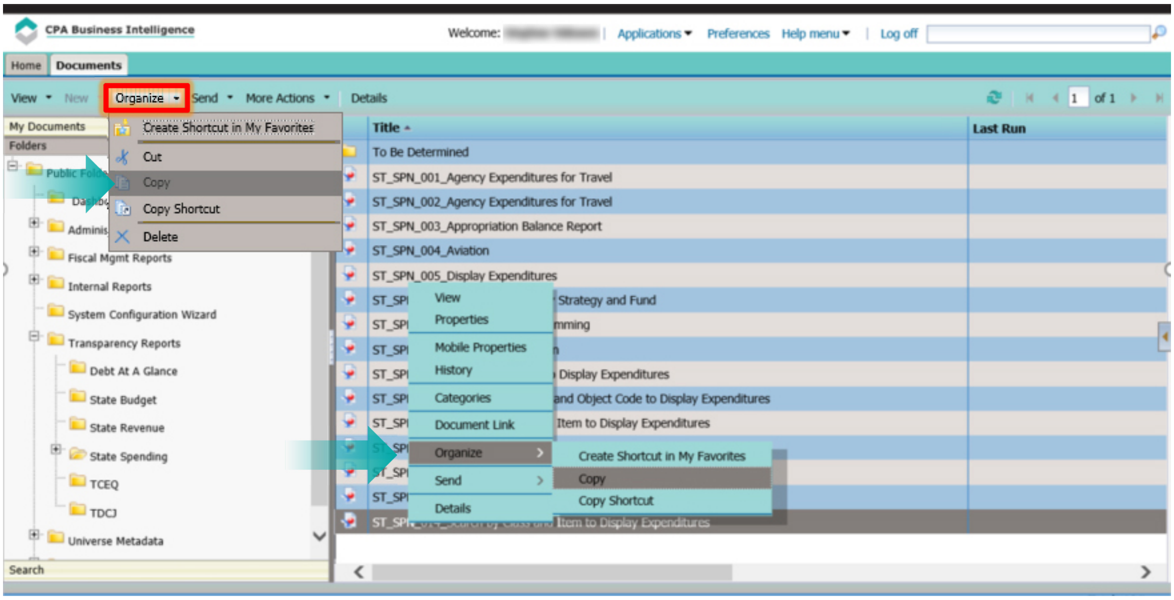


Page 3 – Access the Documents Tab

After logging in, select the documents tab and find the report you want to schedule.

*Select the **Documents** tab*

Drill down to locate your report.

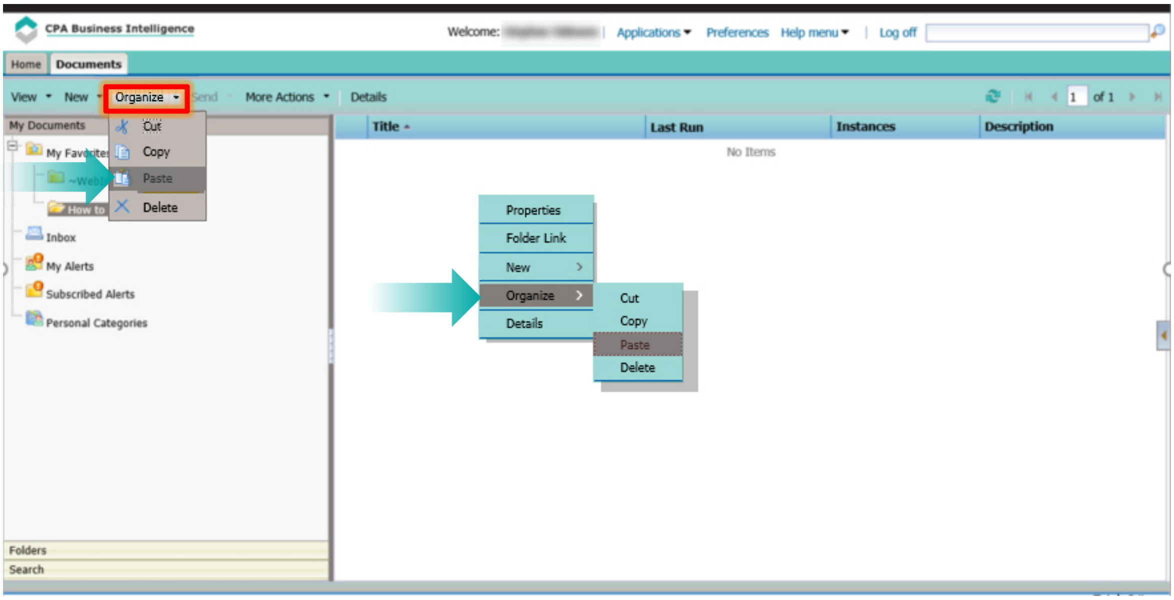


Page 4 – Copy Report to My Favorites Folder

Documents must be scheduled in your **My Favorites** folder. You will need to copy the document there to begin.

*Choose **Copy** from the **Organize** menu, or…*

*Right-click and choose **Copy** in the **Organize** tab.*

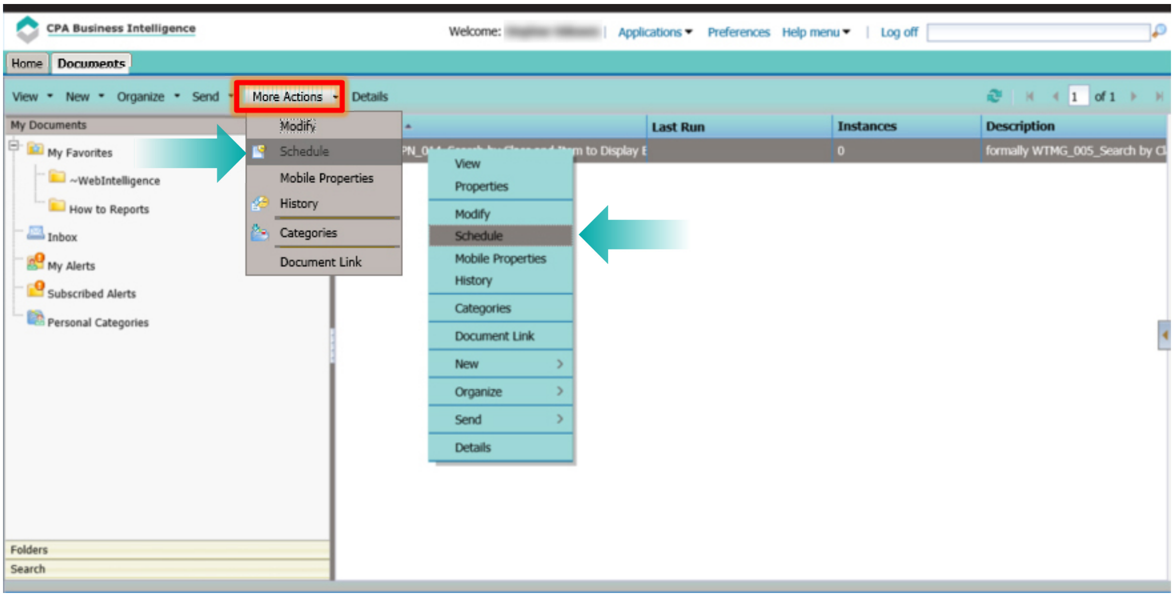


Page 5 – Copy Report to My Favorites Folder

(continued) Paste the report into your **Favorites** folder.

*Select **Paste** from the **Organize** menu, or…*

*Right-click and choose **Paste** from the **Organize** menu.*

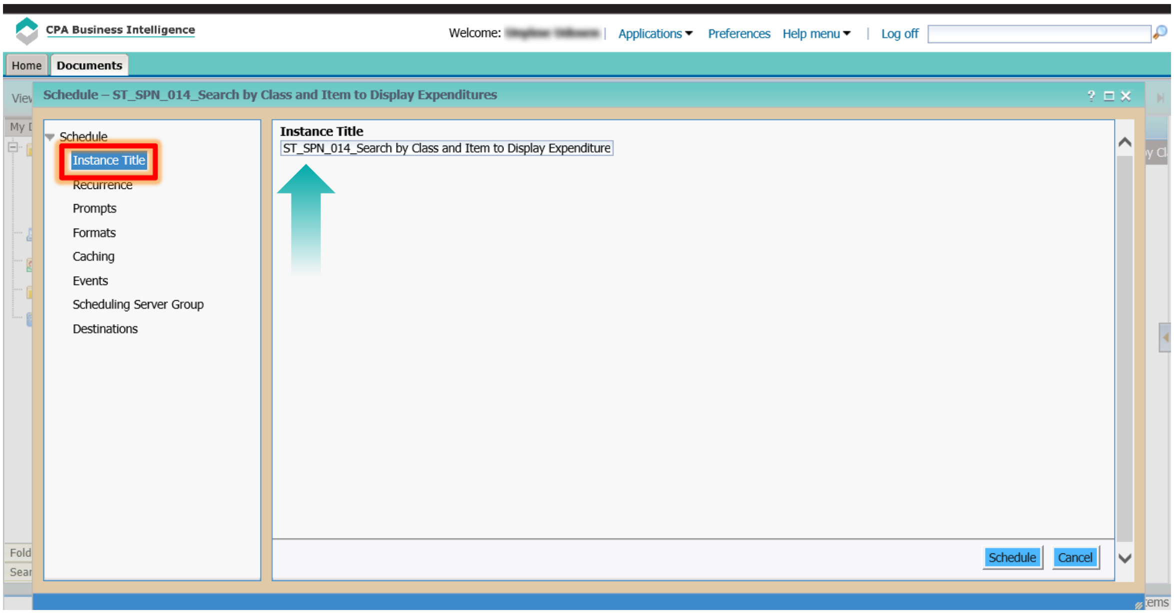


Page 6 – Schedule the Report

Now schedule the report.

*Choose **Schedule** from the **More Actions** menu, or…*

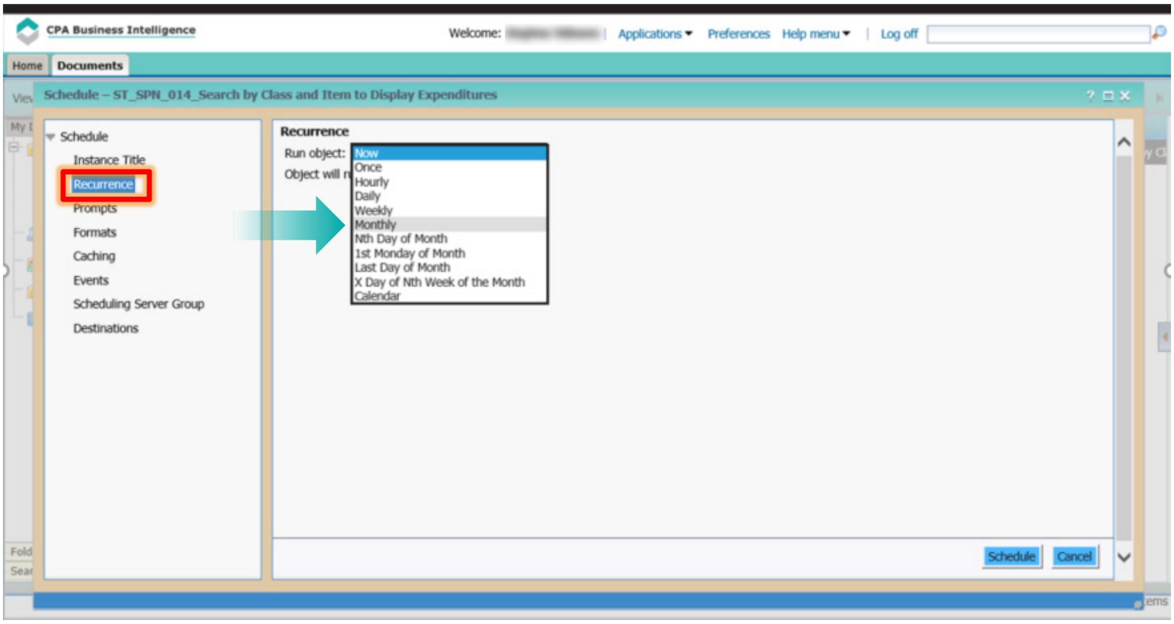
*Right-click the report and choose **Schedule** from the menu.*



Page 7 – Create an Instance Title

With the **Instance Title** option selected in the **Schedule** list, enter a title for the instance you are creating.

*Modify the **Instance Title** here.*

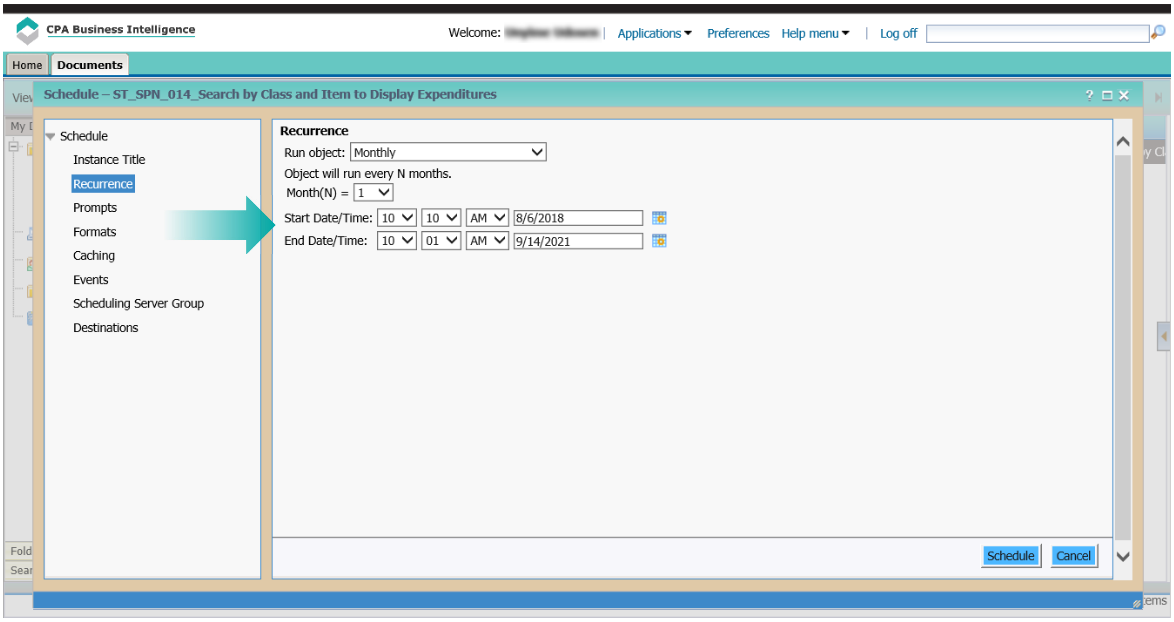


Page 8 – Choose Frequency of Report

Select the **Recurrence** option. The recurrence indicates how often you want to the scheduled report to run.

*Select a recurrence frequency from the **Run Object** drop-down list.*

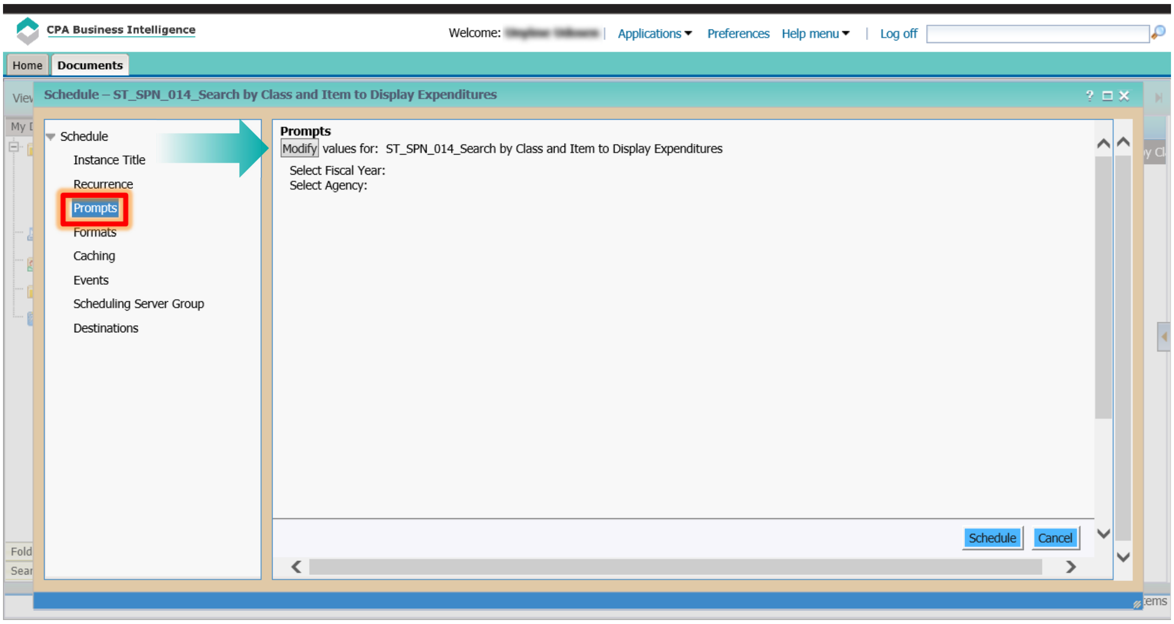
*Choose **Monthly**.*



Page 9 – Choose Frequency of Report (continued)

Complete the remaining recurrence fields (they will vary depending on which recurrence you select).

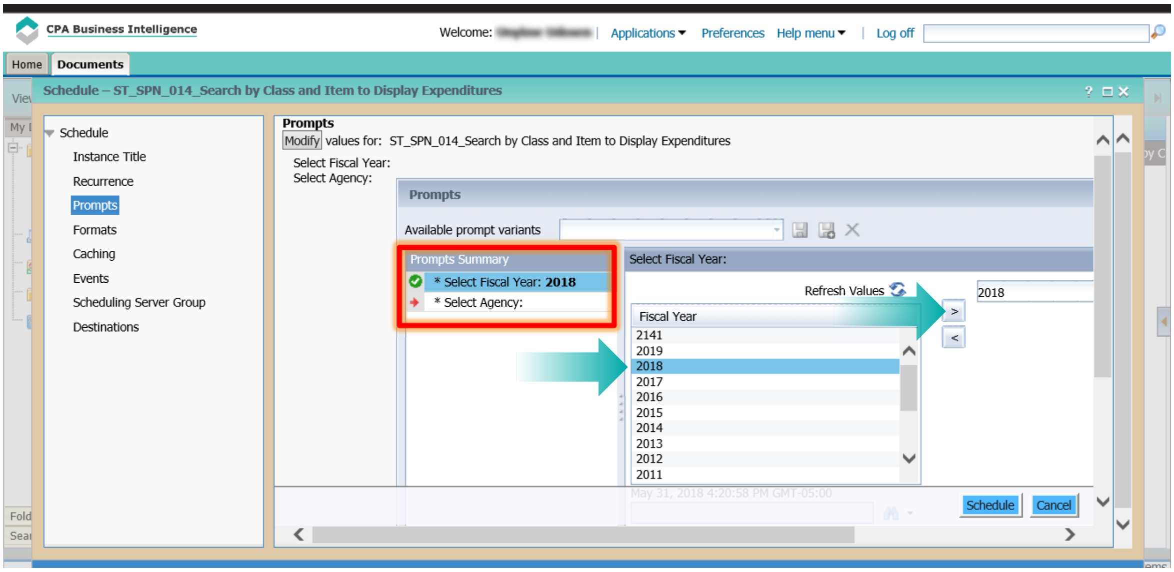
*Enter a **Start Date / Time** and an **End Date / Time** for recurrence.*



Page 10 – Modify Prompts

*Select the **Prompts** option.* (Only available if query has prompts).

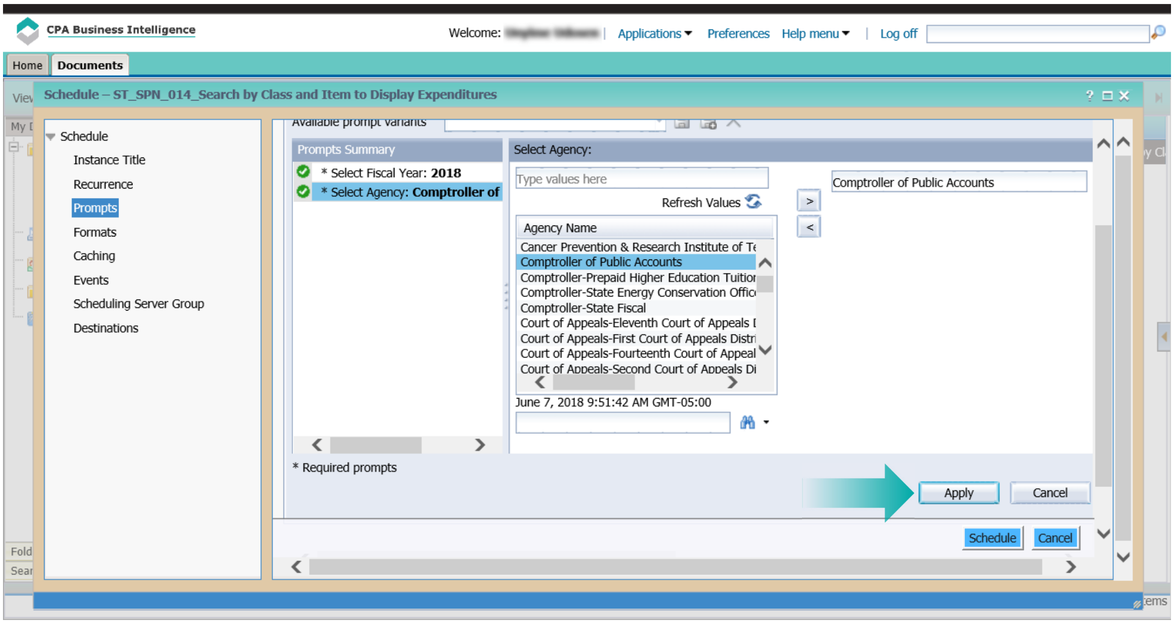
*If you need to modify the prompt values, click the **Modify** button.*



Page 11 – Modify Prompts (continued)

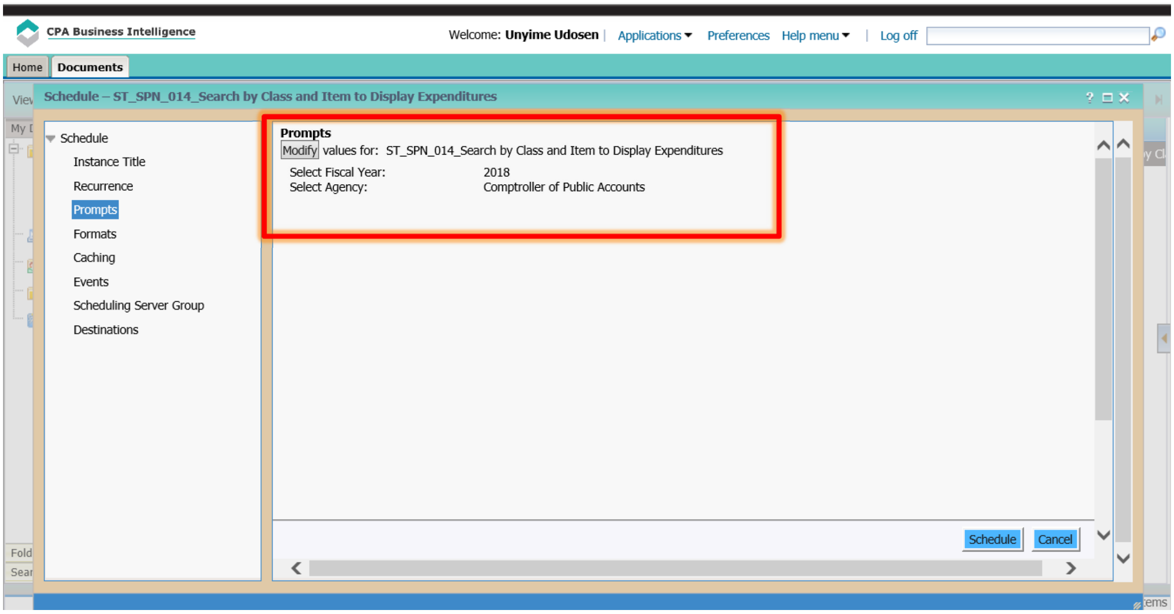
There can be multiple Prompt categories to consider.

Select a category from the Prompt Summary menu, then select and move the desired values into the right-hand window by clicking the arrow ***(>)****.*



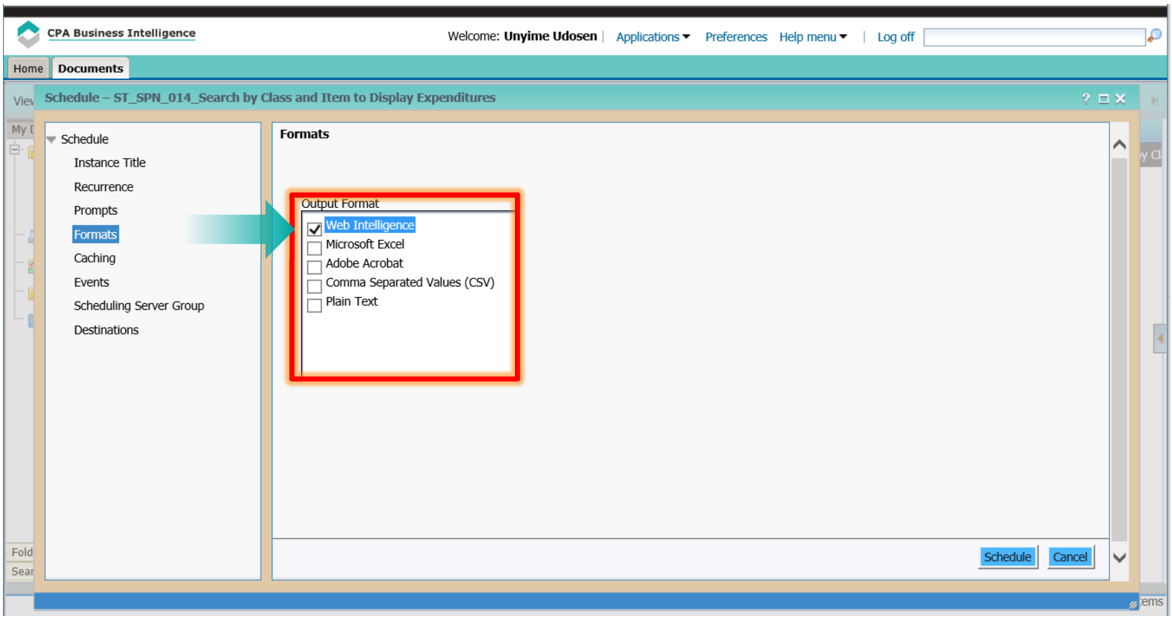
Page 12– Apply the Prompts

Scroll down and click ***Apply*** *to complete the* ***Prompt*** *inputs.*



Page 13 – Review Prompts

Review your **Prompts** selections.



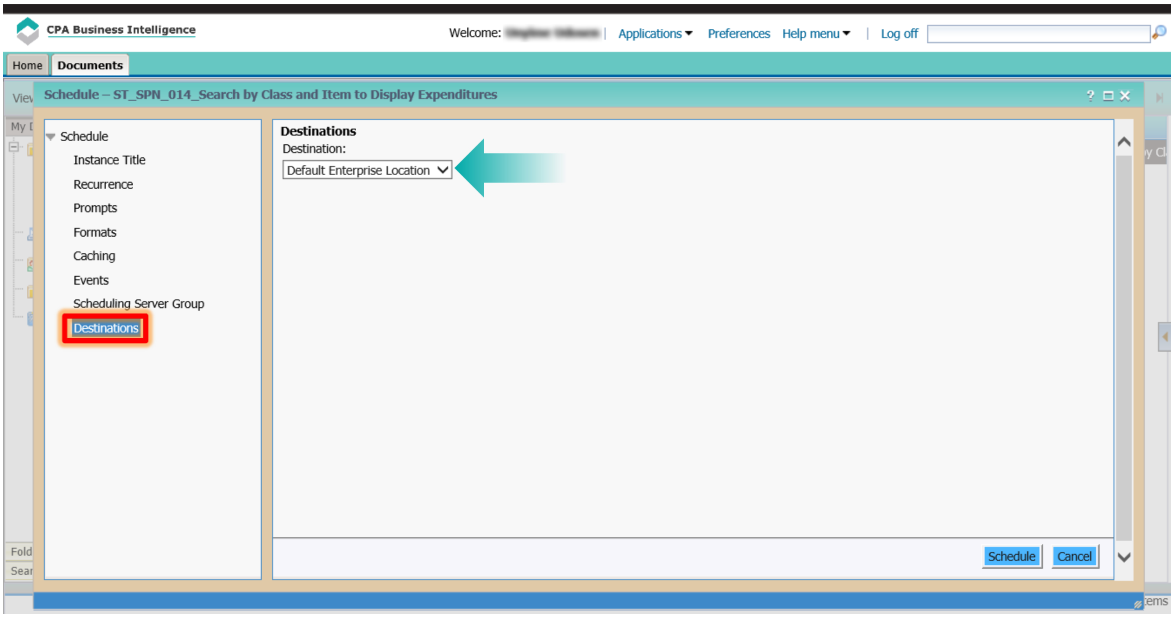
Page 14 – Select Output Format

Select the ***Formats*** *option.*

Select the desired file output format. Options are ***Web Intelligence, Excel, PDF, CSV, and Text****.*

Web Intelligence is the default **Output Format**.

Note: Caching, **Events**, and **Scheduling Server Group** are not enabled features. No values are required on these menus.

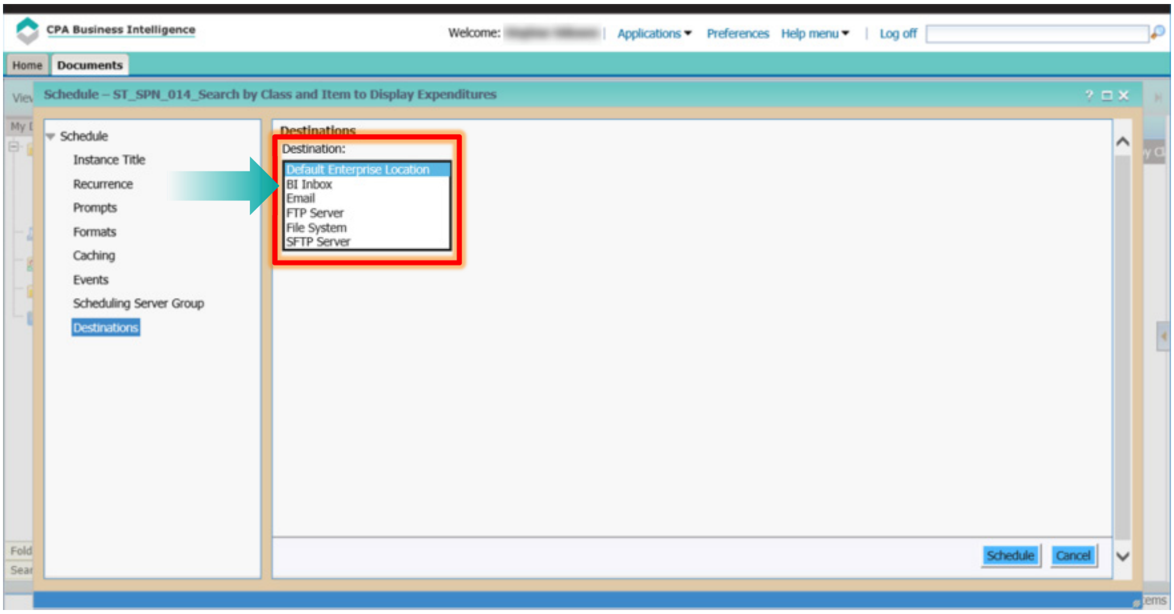


Page 15 – Select a Destination

Select **Destinations** from the **Schedule** list.

There are several destinations where scheduled reports can be delivered.

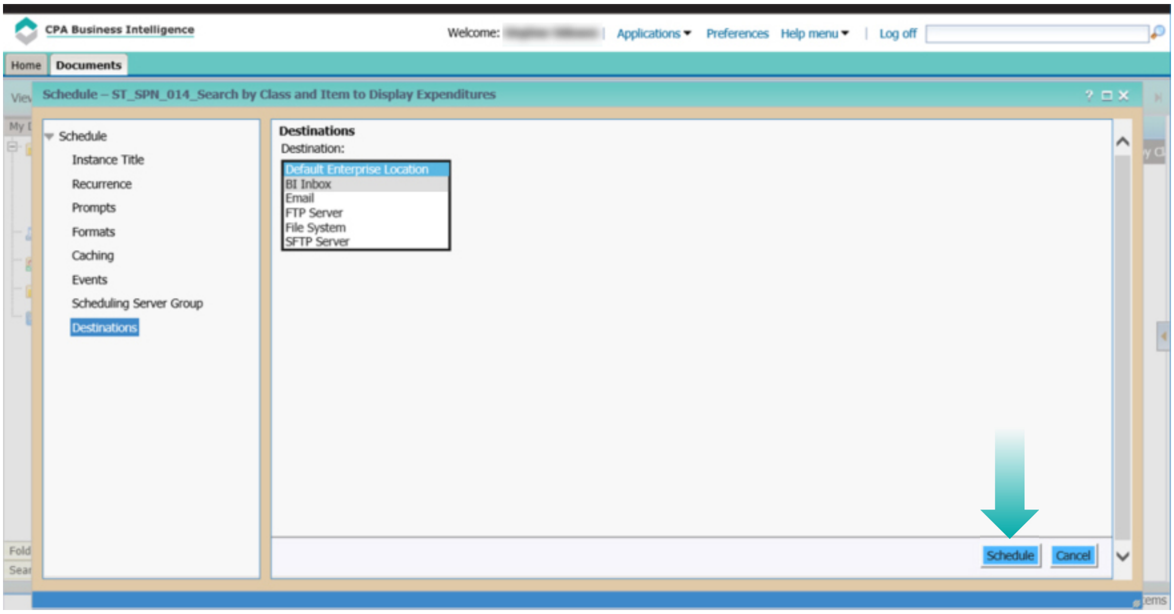
*Select the **Destinations** menu to see options.*



Page 16 – Select a Destination (continued)

The two recommended locations are **BI Inbox** and **File System**. **Default Enterprise Location** is also an option.

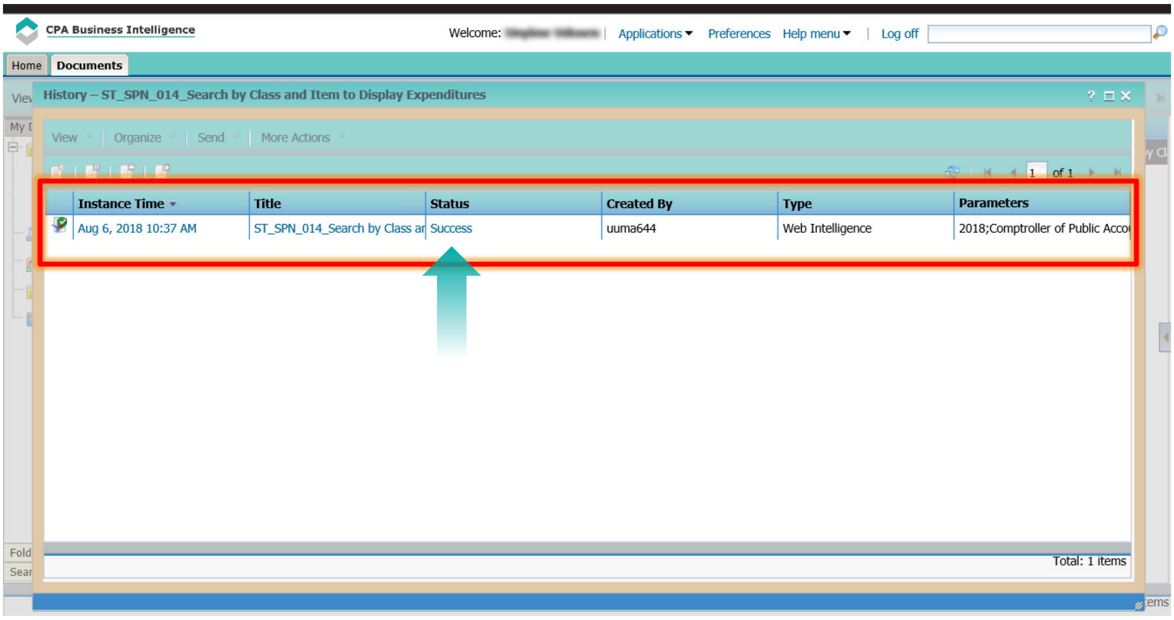
*Choose **BI Inbox**.*



Page 17 – Activate the Schedule

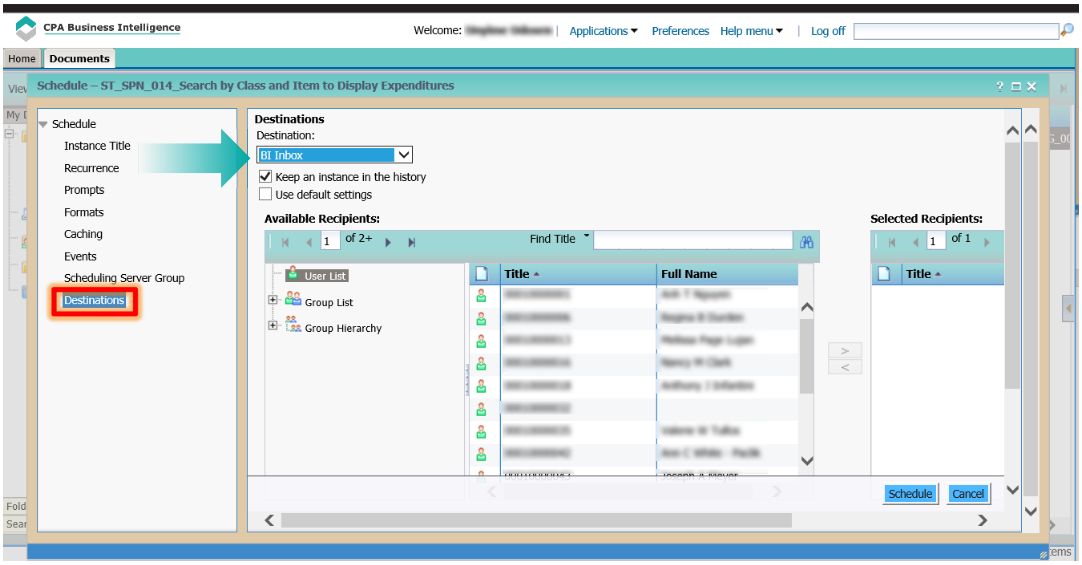
Select the **Schedule** button to activate the schedule (located in the bottom right corner of the window).

*Select **Schedule**.*



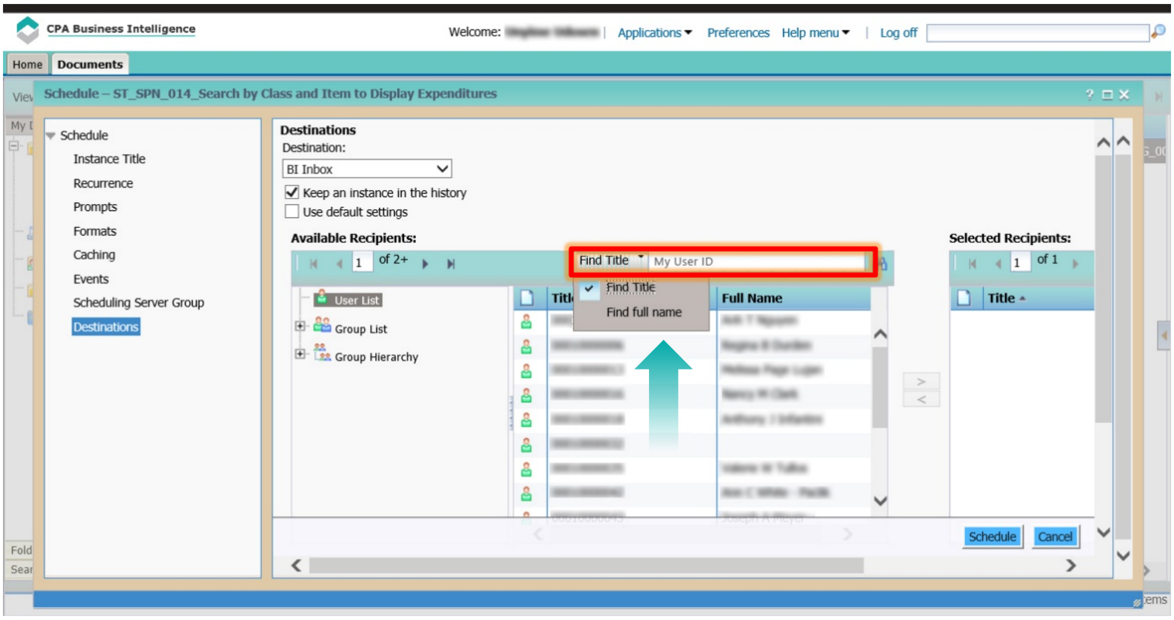
Page 18 – Screen Status

You can now view the status of the report.



Page 19 – Schedule to BI Inbox

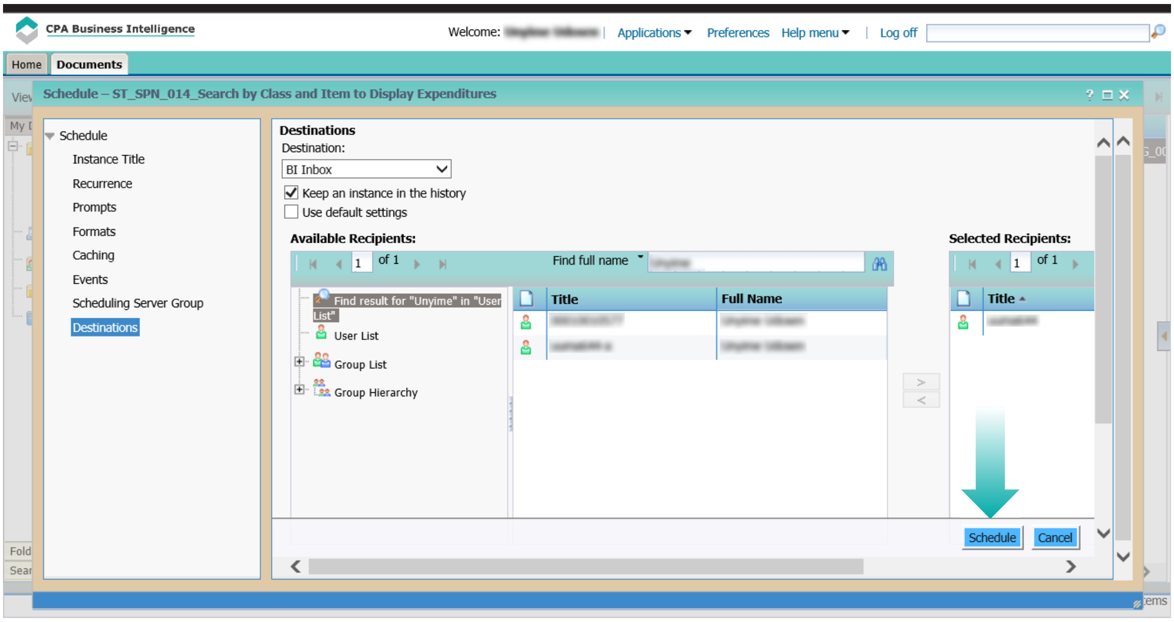
Under **Schedule**, find and select **Destinations**, then choose **BI Inbox**.



Page 20 – Schedule to BI Inbox

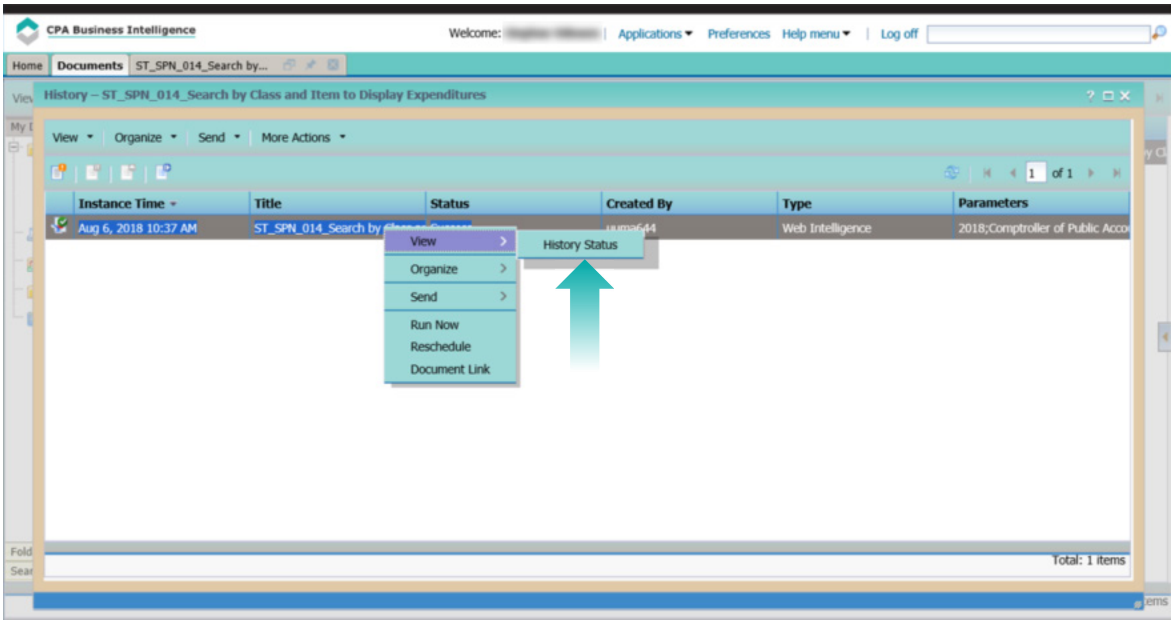
(continued) *Select **Find Title** and add user ID.*

*Select **Find full name** to add user name.*



Page 21 – Schedule to BI Inbox (continued)

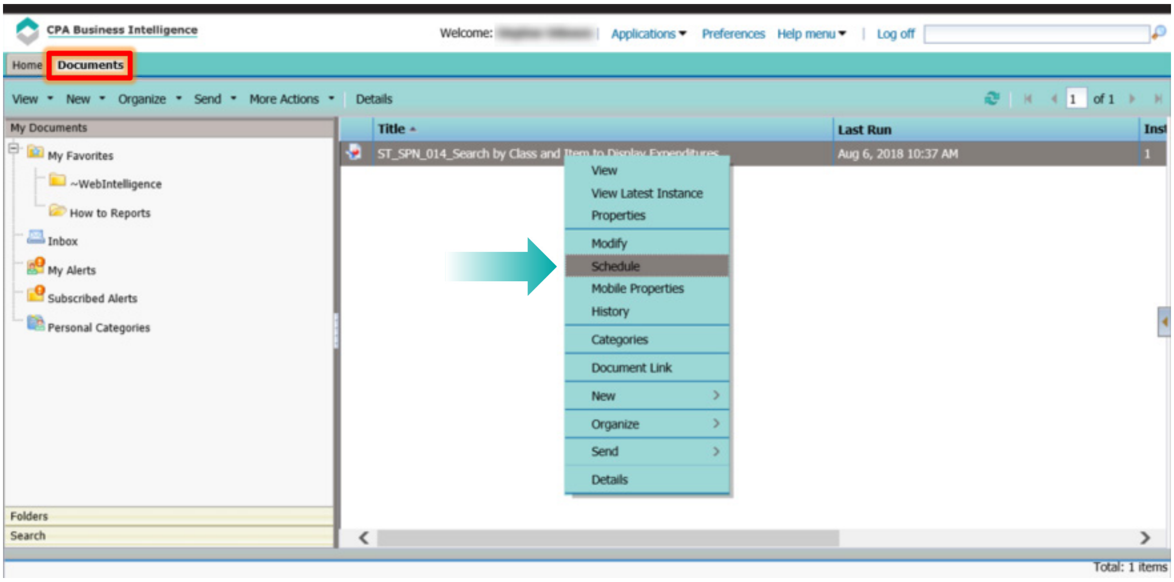
Select ***Schedule***. The report is sent to user's inbox.



Page 22 – Viewing a Schedule

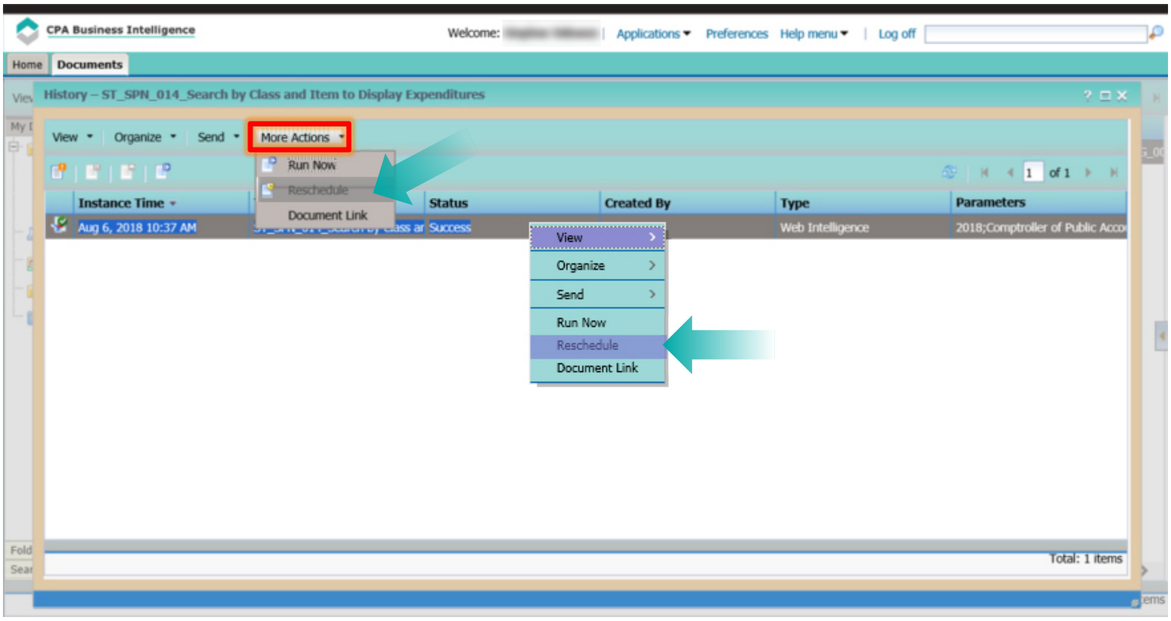
You can now review and/or edit your scheduled report easily.

*Right-click the report and choose **History Status** from the menu.*



Page 23 – Viewing a Schedule (continued)

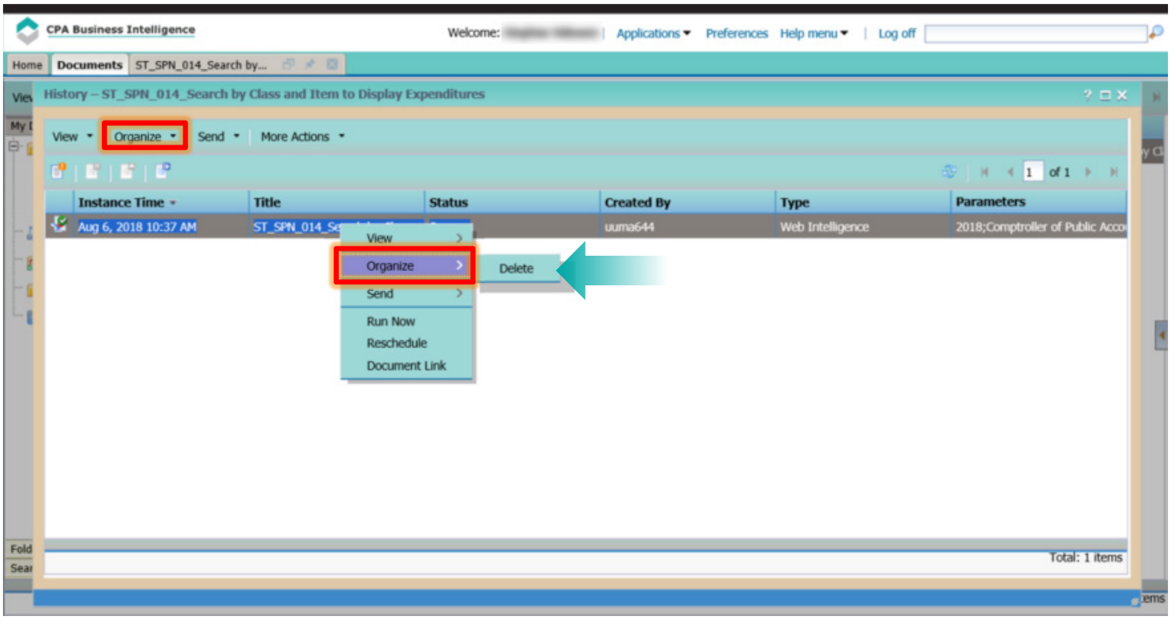
If you have just logged in, find the report in the **Documents** folder, then right-click and choose **Schedule** from the drop-down menu.



Page 24 – Rescheduling a Report

To edit the parameters of your schedule, simply go to the **More Actions** menu and select **Reschedule** (or right-click on the report and choose **Reschedule** from the menu).

Follow the steps for creating a schedule to make changes to the schedule parameters.



Page 25 – Deleting a Schedule

You can delete the schedule from a report if it is no longer needed.

Select the report and choose **Delete** from the **Organize** drop-down menu on the toolbar, or…

Right-click the report and choose **Organize / Delete** from the menu.

Page 26 - Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

Additional Tutorials