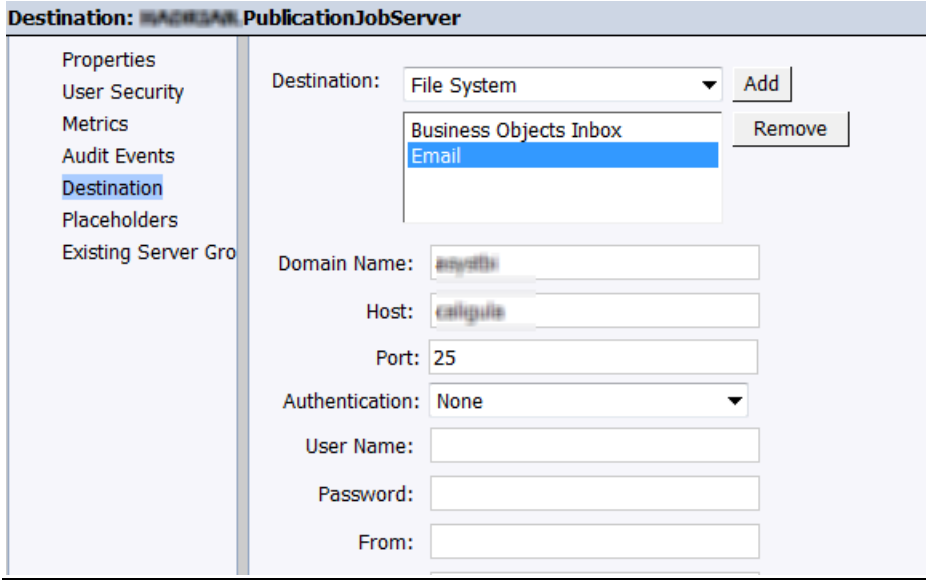


UNDERSTANDING PUBLICATIONS

"Publishing" is the process of making documents such as Crystal reports, Web Intelligence documents, and Desktop Intelligence documents publicly available for mass consumption. The contents of these documents can be distributed automatically via email or FTP, saved to disk, or managed through the BusinessObjects Enterprise platform for web viewing, archiving, and retrieval, and automated through the use of scheduling. From within InfoView or the CMC, you can take documents and tailor them for different users or recipients; schedule a publication to run at specified intervals; and send it to a number of destinations, including recipients' Business Objects inboxes and email addresses.

1. **Initial Setup** – Before attempting to create a publication there are a few things to setup first.
 - 1.1. **Publication server** – Log on to the CMC and navigate to Servers. Ensure the Publication server is started and enabled.
 - 1.2. **Destinations** – Ensure that *Email* is correctly setup for all job server destinations. The following must be set up correctly for the Crystal Reports Job Server, Publications Job Server, and Destination Job Server. Double Click on the job server to access the server properties/Select Destinations on the left and then add *Email*. If it is already there simply click on it to open the Email destination properties.



Destination: PublicationJobServer

Properties
User Security
Metrics
Audit Events
Destination
Placeholders
Existing Server Gro

Destination: File System
Business Objects Inbox
Email

Domain Name:

Host:

Port:

Authentication: None

User Name:

Password:

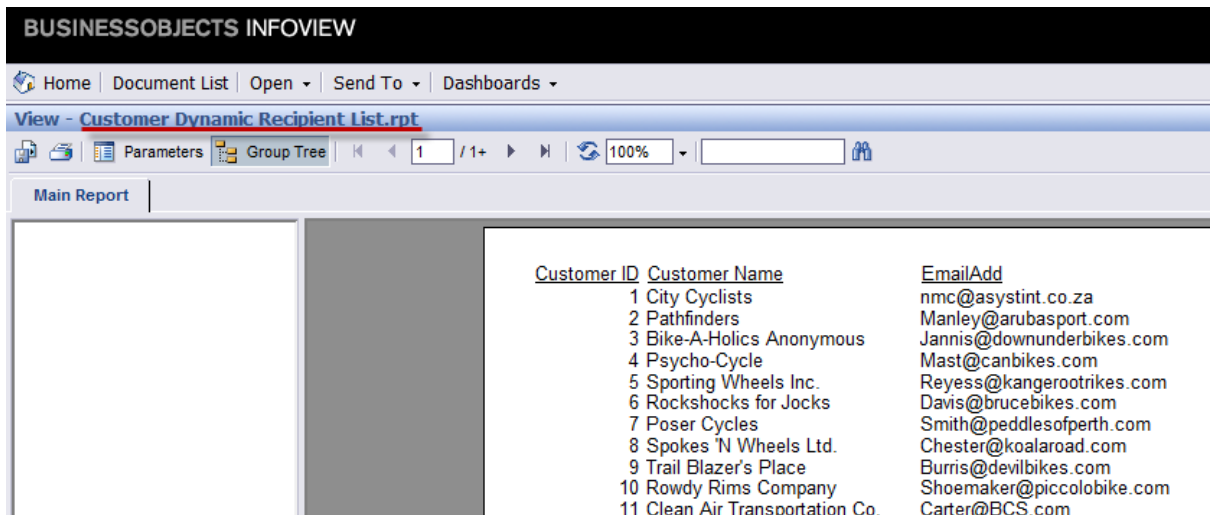
From:

2. **Ensure than normal scheduling works** – Before creating your first publication ensure that normal scheduling works by creating a schedule and emailing the report. Sometimes there can be problems with connectivity between your BO server and Exchange server and these must be resolved first. You can use TELNET checks to troubleshoot these communication problems if they do crop up. Also, ensure that your Exchange server does not have specific rules set up that prevent certain emails from being sent (e.g. certain attachment types might not be allowed). Once you have successfully scheduled a report that is attached in an email you can go ahead and create your first publication.

3. Creating a Dynamic Recipient List – who needs to receive this report and what are their email addresses? This needs to be setup beforehand and can either be a Crystal Report or a WEBI report. The following format **must** be adhered to (your report must have 3 columns): Recipient ID (required), Full name of recipient, Email address. Publish this report to Enterprise.

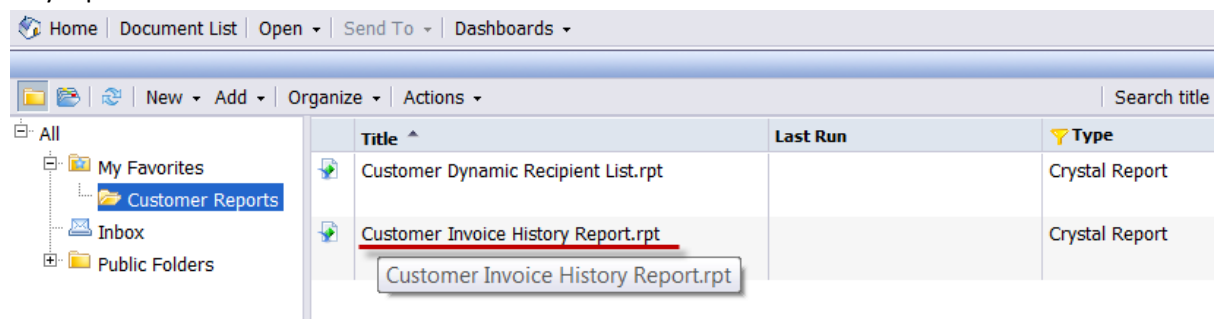
Customer ID	Customer Name	E-mail
1	City Cyclists	Christianson@bba.com
2	Pathfinders	Manley@arubasport.com
3	Bike-A-Holics Anonymous	Jannis@downunderbikes.com
4	Psycho-Cycle	Mast@canbikes.com
5	Sporting Wheels Inc.	Reyess@kangerootrikes.com
6	Rockshocks for Jocks	Davis@brucebikes.com
7	Poser Cycles	Smith@peddlesofperth.com
8	Spokes 'N Wheels Ltd.	Chester@koalaroad.com
9	Trail Blazer's Place	Burris@devilbikes.com

Publish to Enterprise: Save the report to Enterprise and check that it runs successfully



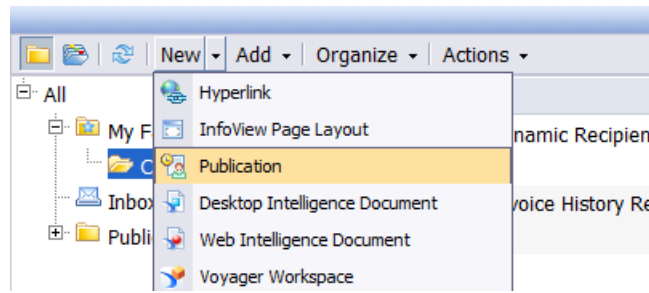
Customer ID	Customer Name	EmailAdd
1	City Cyclists	nmc@asystint.co.za
2	Pathfinders	Manley@arubasport.com
3	Bike-A-Holics Anonymous	Jannis@downunderbikes.com
4	Psycho-Cycle	Mast@canbikes.com
5	Sporting Wheels Inc.	Reyess@kangerootrikes.com
6	Rockshocks for Jocks	Davis@brucebikes.com
7	Poser Cycles	Smith@peddlesofperth.com
8	Spokes 'N Wheels Ltd.	Chester@koalaroad.com
9	Trail Blazer's Place	Burris@devilbikes.com
10	Rowdy Rims Company	Shoemaker@piccolobike.com
11	Clean Air Transportation Co.	Carter@BCS.com

4. Publish the Source Report to Enterprise – This is the report that the Publication is going to be based on. In this example it is a *Customer Invoice History* report. This is a basic report which has only 1 parameter *Customer ID* and the data is filtered on this field too.

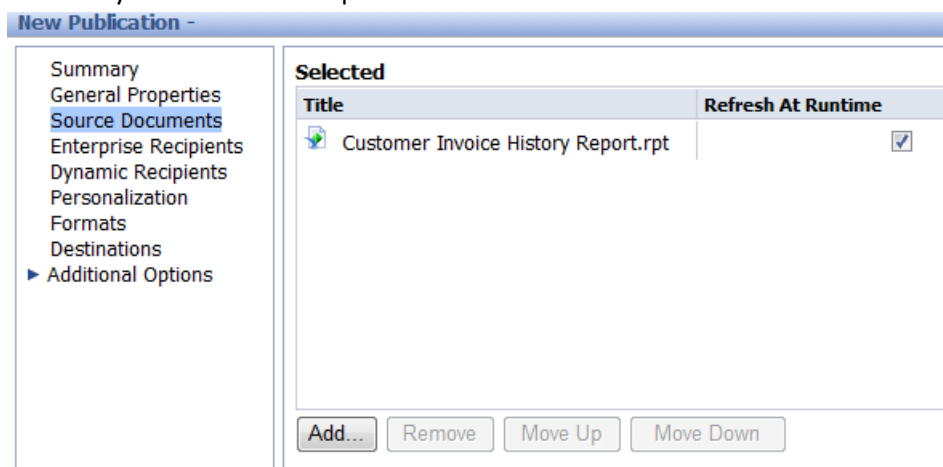


Title	Last Run	Type
Customer Dynamic Recipient List.rpt		Crystal Report
<u>Customer Invoice History Report.rpt</u>		Crystal Report

5. Create your new Publication:

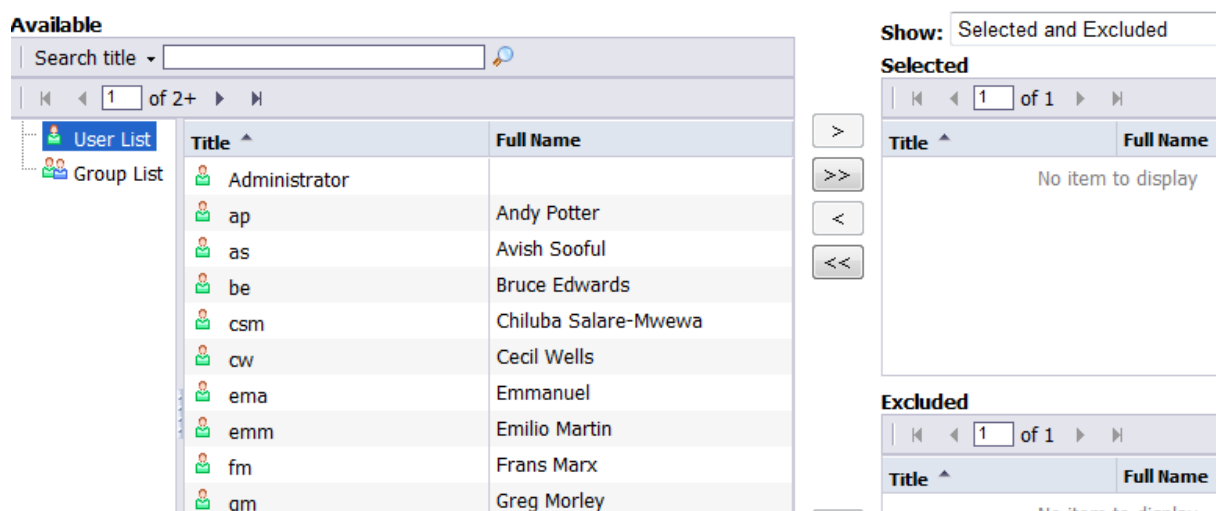


- 5.1. Enter General Properties Details like Title info, Description, Keywords.
- 5.2. Select *Source Documents/Add*. Find the Customer Invoice History Report. Note: you can have more than 1 source document. This can be useful if you want to send each customer 1 email only but have a few reports attached to that email.



- 5.3. *Enterprise Recipients* is where you can specify any users (within Business Objects) that need to receive the publication. In this example, I only want this publication to be emailed to those customer's specified in my dynamic recipient list so will not enter anything here.

Enterprise Recipients



- 5.4. Select *Dynamic Recipients* and Crystal Reports as the source for the dynamic recipient list. Navigate to the Customer Dynamic Recipient List.rpt report and wait for additional options to load. You then have to map fields from the source document to the fields in the dynamic recipient list. You can use the entire list or you can specify which recipients only should receive the publication by un-checking the 'Use entire list' option. You either *Include* certain addresses or *Exclude* others.

Choose the source for the dynamic recipients

Crystal Reports

Select the source document for the dynamic recipients.

Customer Dynamic Recipient List.rpt

Map fields from the source document to those used to send the Publication.

Recipient Identifier (required): Customer_Query.Customer ID

Full Name: Customer_Query.Customer Name

Email: @EmailAdd

Specify the recipients for the Publication.

Use entire list

- 5.5. You now need to personalize the publication so that each customer receives only their data. Select the *Personalization* option. Simply map the field from the dynamic recipient list to the field in the Source document (i.e. the parameter)

Parameters			
Title	Report Parameter	Default Value	Dynamic Recipient Mapping
Customer Invoice History Report.rpt	*CustomerNum	1.00	<input type="button" value="Edit..."/> Customer_Query.Customer ID

- 5.6. Now, select *Formats* to specify which format you would like the output of the publication to take. The following formats are supported:

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
- mHTML

5.7. The next step is to specify the *Destination* information. You can send your publication out to one or many destination targets (Inbox, FTP, File System, BO Inbox). You can also specify if you want to ZIP the attachments (this could be useful if you have more than 1 source document in your publication). As with normal scheduling, you can also configure the Subject line and Message details by using placeholders.

Select Destinations:

- Default Enterprise Location
- Business Objects Inbox
- Email
- FTP Server
- File System

Show options for selected destinations:

Email

- Merge Exported PDF
- Package as ZIP File
- Deliver objects to each user

From: Add placeholder... ▼

To: Add placeholder... ▼

Cc: Add placeholder... ▼

Subject: Add placeholder... ▼

Message: Dear %SI_USERFULLNAME%,

Please find attached Invoice History.

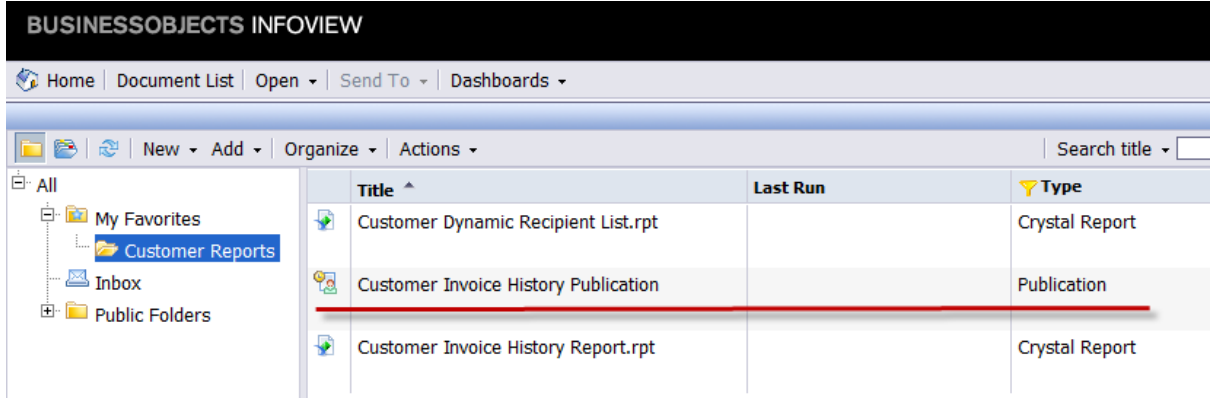
Regards,
YOUR COMPANY

5.8. Don't forget to SAVE your publication.

6. Well Done! You have created your first simple publication. You may also configure further settings by selecting *Additional Options*. A useful one is "Merged PDF Options" whereby you can combine more than one report into 1 pdf and configure page numbers and table of contents. Other options are:

- ▼ Additional Options
 - [Print Settings](#)
 - Delivery Rules
 - Merged PDF Options
 - Database Logon
 - Recurrence
 - Events
 - Scheduling Server Group
 - Advanced

- Your publication will now be available in InfoView, whereby you can schedule it as per normal.

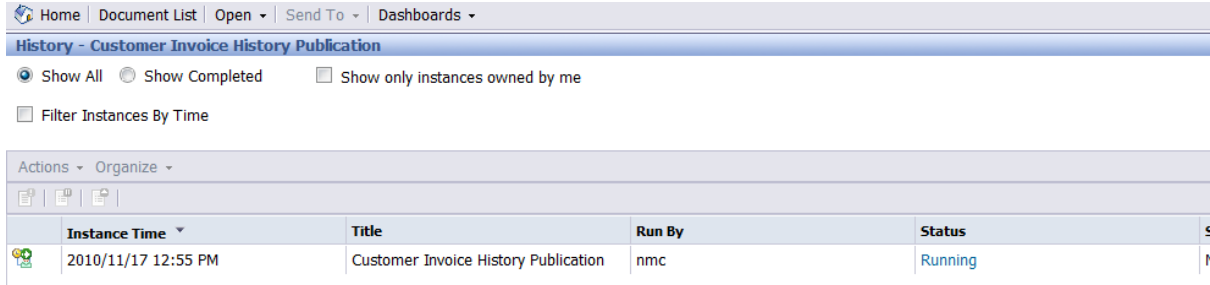


BUSINESSOBJECTS INFOVIEW

Home | Document List | Open | Send To | Dashboards

New | Add | Organize | Actions | Search title

Title	Last Run	Type
Customer Dynamic Recipient List.rpt		Crystal Report
Customer Invoice History Publication		Publication
Customer Invoice History Report.rpt		Crystal Report



Home | Document List | Open | Send To | Dashboards

History - Customer Invoice History Publication

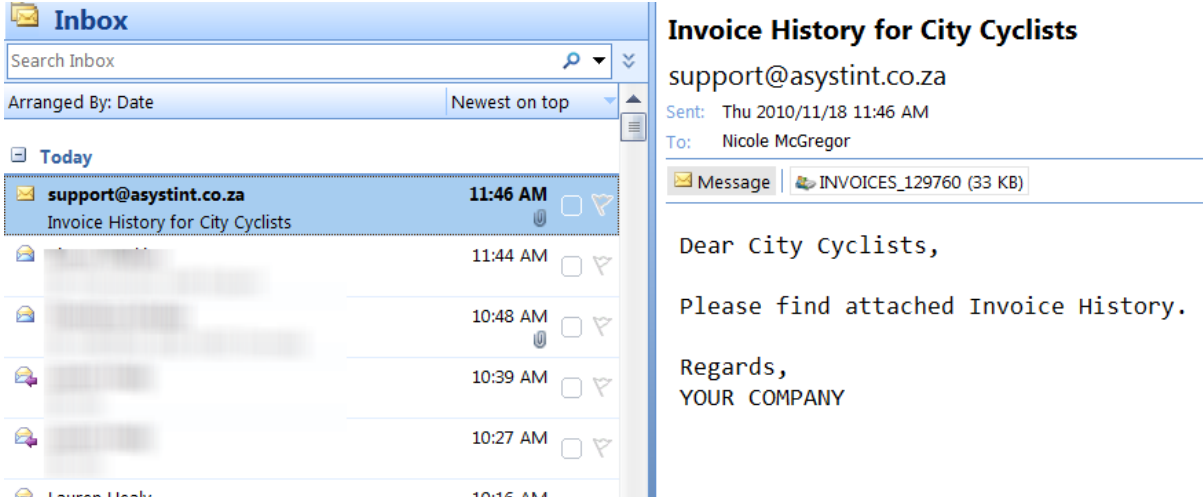
Show All
 Show Completed
 Show only instances owned by me

Filter Instances By Time

Actions | Organize

Instance Time	Title	Run By	Status
2010/11/17 12:55 PM	Customer Invoice History Publication	nmc	Running

- Open your Email account – The report should be delivered



Inbox

Search Inbox

Arranged By: Date | Newest on top

Today

- support@asystint.co.za | Invoice History for City Cyclists | 11:46 AM
- [Blurred] | 11:44 AM
- [Blurred] | 10:48 AM
- [Blurred] | 10:39 AM
- [Blurred] | 10:27 AM
- [Blurred] | 10:16 AM

Invoice History for City Cyclists

support@asystint.co.za

Sent: Thu 2010/11/18 11:46 AM

To: Nicole McGregor

Message | INVOICES_129760 (33 KB)

Dear City Cyclists,

Please find attached Invoice History.

Regards,
YOUR COMPANY