McGill

InfoView for End Users

BOE Crystal Reports

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Introduction

Once Crystal reports are created, they are published to Business Object Environment (BOE). You will use InfoView to view these Crystal reports from the web. InfoView also allows you to view older instances of the report, as well as schedule the report to run at specified times.

The following user guide is to explain the procedure to do the following in BOE using InfoView:

- Log in to InfoView

- Understand the InfoView main menu

- View a Crystal report using InfoView

- View an older instance of a Crystal report using InfoView

- Schedule a Crystal report using InfoView.

Note	Crystal reports are available to you 24 hours a day, 7 days a week!

InfoView

Log in to InfoView

To log in to InfoView:

1. Open your web browser (i.e Internet Explorer, Firefox or Safari) and type the following URL: https://preport1.campus.mcgill.ca/InfoViewApp

1. The **Log On to InfoView** screen opens. Enter your ***McGill Username** and **McGill Password** in the corresponding fields. Ensure that the Authentication field is **LDAP**, as shown below. Click **Log On**.
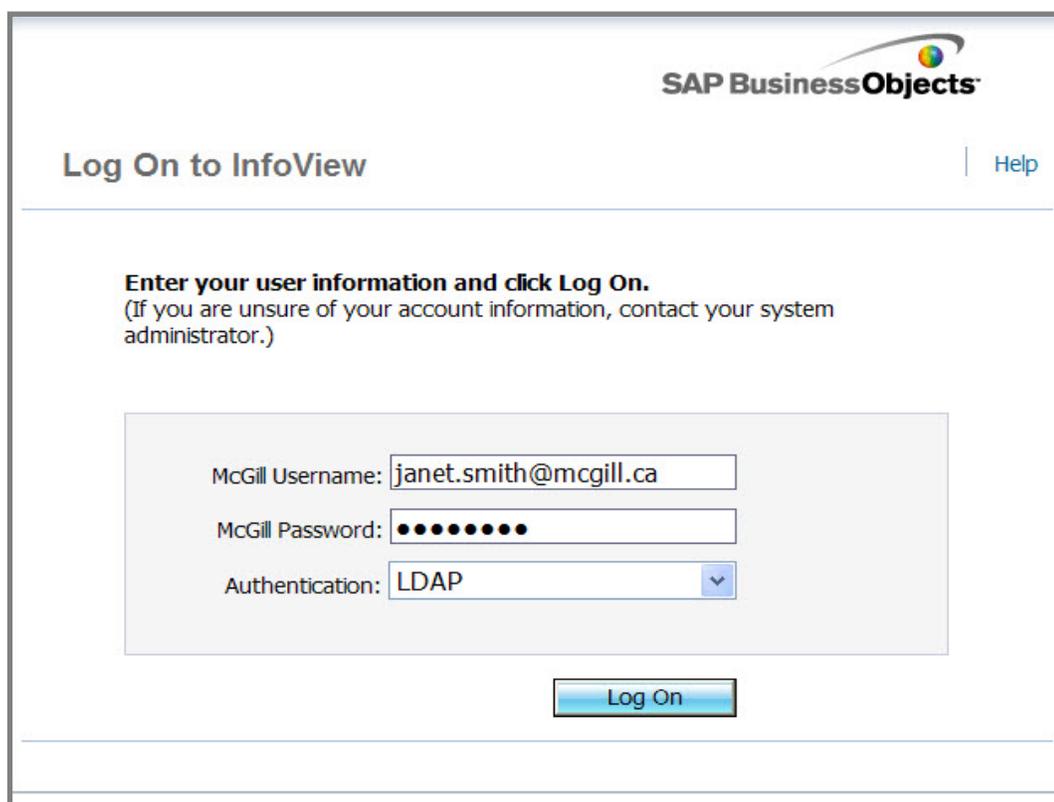
* McGill Username and McGill Password: for more information, go to http://kb.mcgill.ca/it/easylink/article.html?id=1006

InfoView main menu

Upon successful log in, the SAP BUSINESSOBJECTS INFOVIEW main menu opens. It consists of two sections, the **Header panel** and the **Workspace panel**.
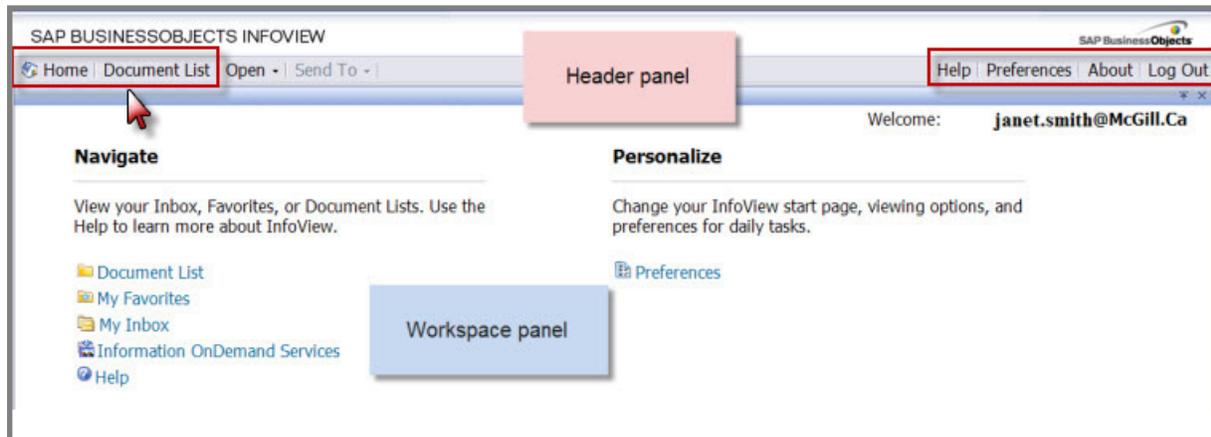
The **Header panel** displays the logo and the McGill Username used to log in to InfoView. From here, you may use the following items on the InfoView toolbar :

- Click **Home** to display the InfoView home page.

- Click **Document List** to locate a report in the folders that you have access to.

- Click **Help** to display more online help for InfoView.

- Click **Preferences** to view how the information is displayed on the InfoView start page. Default preferences are already selected for you. If you make any changes to the preferences (e.g. Change Password), click **OK** to save the changes.

- Click **About** to display the product information for InfoView.

- Click **Log Out** to log out of InfoView.

- Do not click **Open**.

The **Workspace panel** displays InfoView content. From here, you can:

- Browse the reports using Document List.

- View and schedule reports.

Note: Do not use the back button of the web browser to navigate within InfoView.

View a Crystal report in BOE using InfoView

From the Header panel of the InfoView main menu:

1. Click **Document List** from the InfoView toolbar. All the folders that you have been given access to will display.

2. Using **Public Folders** from the pane on the left-hand side, locate the Crystal report you want to view. Double-click the report title to open it.
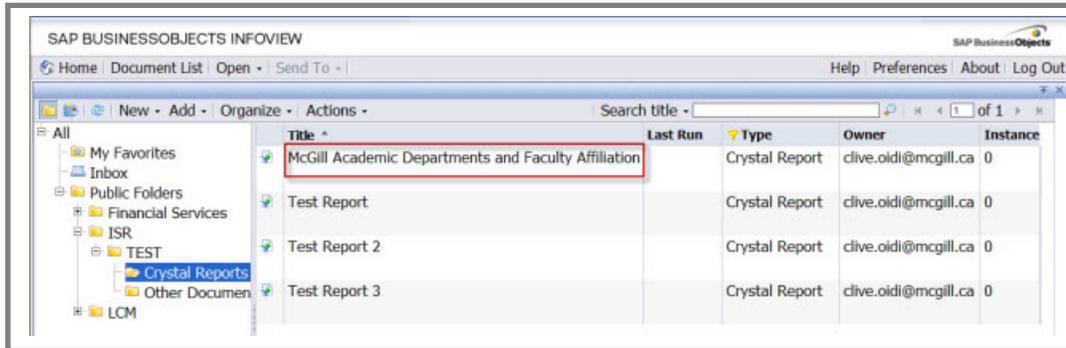
3. If the report requires a data source, a Database Logon page displays. Enter your credentials. For example, if your report is accessing data from the Banner Data Warehouse, you will be asked to enter your data warehouse credentials (Banner User ID and Password). Click **OK**.
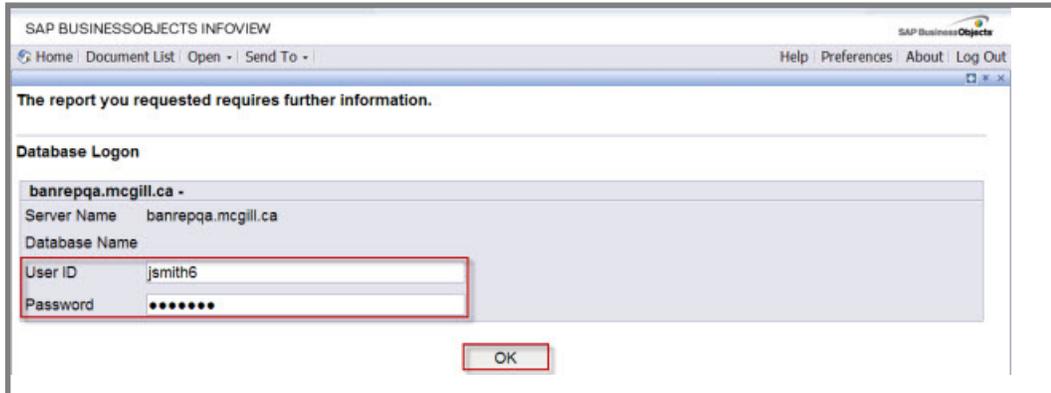
4. For some reports, you may be prompted to enter other fields (e.g. fiscal year). Once you enter or select the field(s), click **OK** to view the report. The report will display in the Workspace panel. You can scroll through the report pages as shown on the next page. Click on the **Refresh Report** icon to get a report using the most recent data. To close the report, click **Close document** (the 'X' on the top right-hand side of screen).
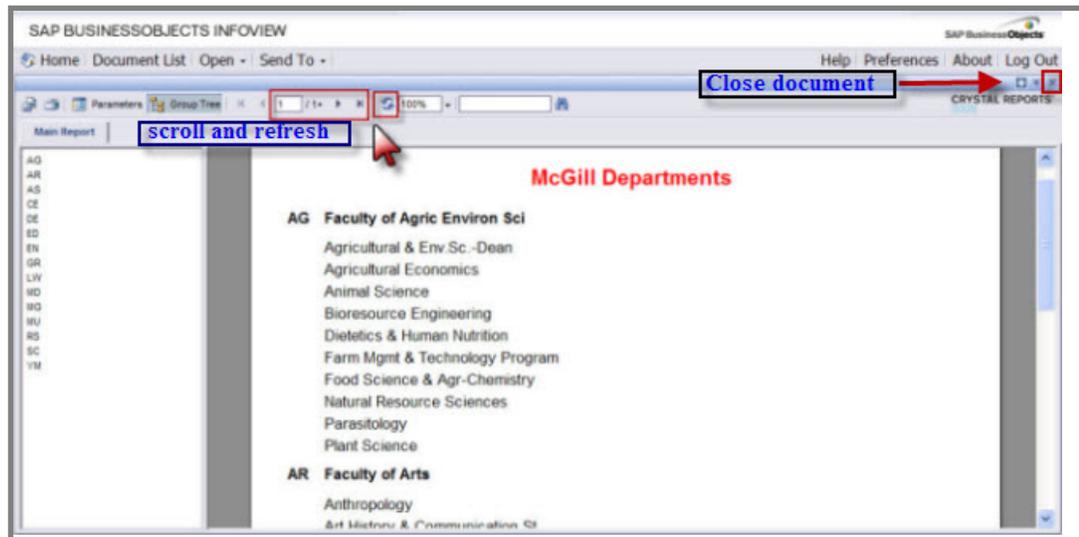
View an older instance of a Crystal report in BOE using InfoView

An instance is a version of the Crystal report that contains data from the time the report was run. You can view an older instance of a Crystal report. From the Header panel of the InfoView main menu:

1. Click **Document List** from the InfoView toolbar. All the folders that you have been given access to will display.
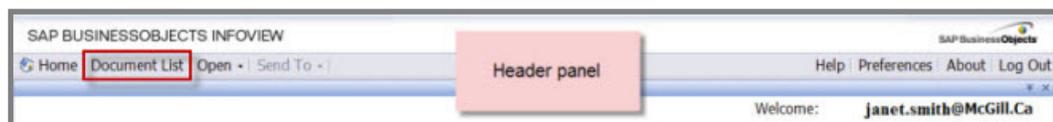
2. Using **Public Folders** from the pane on the left-hand side, locate the Crystal report you want to view. Select the report title by clicking on it.

3. Click **Actions** and select **History** as shown on the next page.
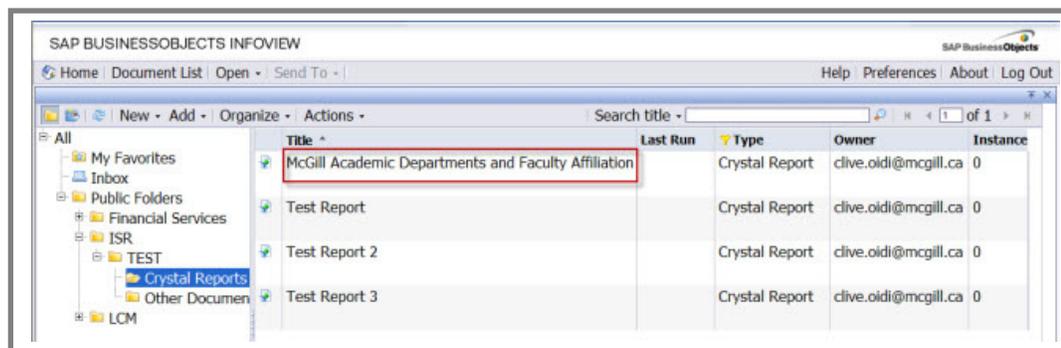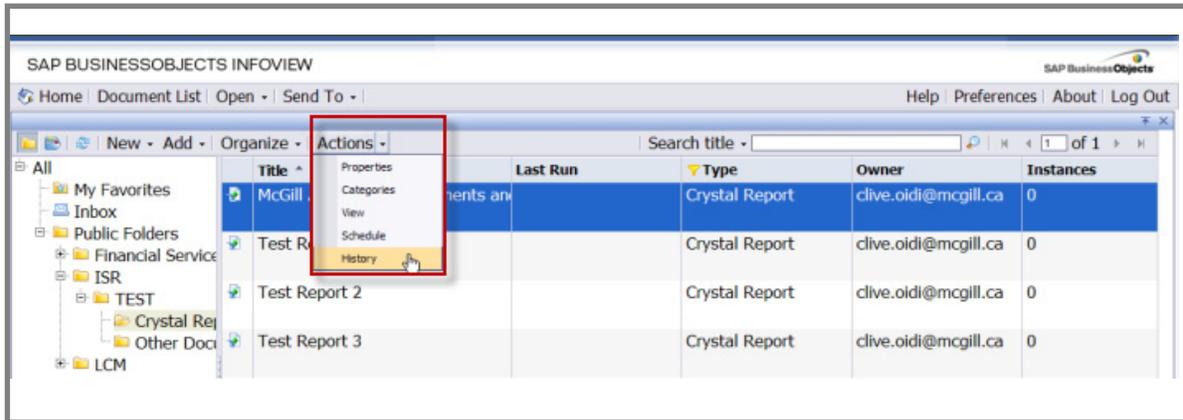
The **History** screen appears. If there are other instances of the report, they will display. Double-click the instance you wish to view. You have the option of filtering the instances by selecting the appropriate radio buttons and check boxes.

To exit the **History** screen, click the **Close document** icon (the 'X' on the top right-hand side of screen).
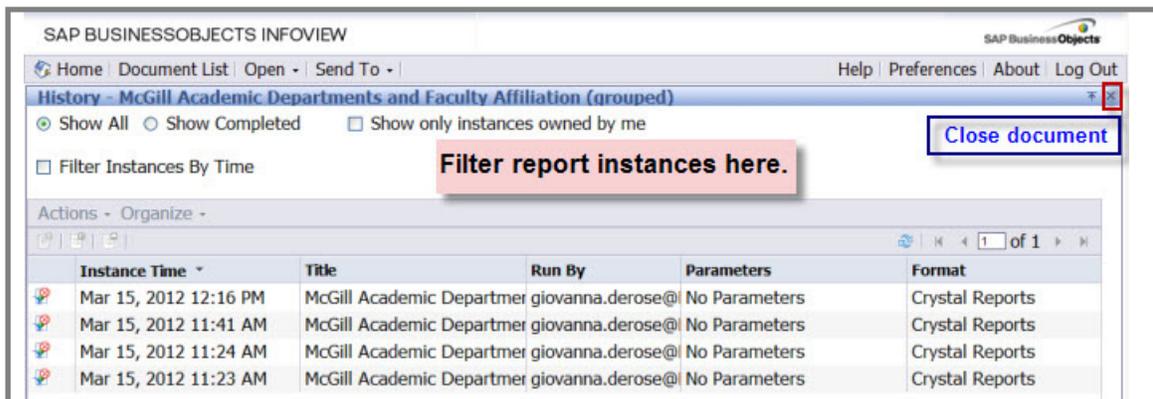
Schedule a Crystal report in BOE using InfoView

You can schedule a report so it can run automatically at specified times. When a scheduled report runs successfully, an instance is created. An instance is a version of the report that contains data from the time the report was run.

These instances are accessible by using **Actions > History** from the Header panel of the InfoView toolbar. For more information on instances, refer to the section on page 7 called 'View an older instance of a Crystal report in BOE using InfoView".

To schedule a Crystal report, from the **Header** panel of the InfoView main menu:

1. Click **Document List** from the InfoView toolbar. All the folders that you have been given access to will display.
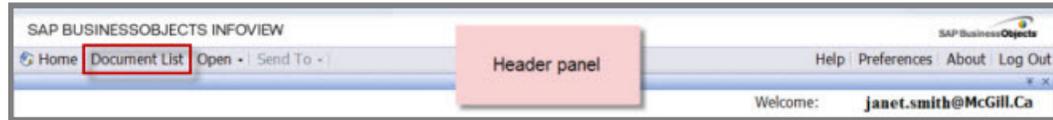
2. Using **Public Folders** from the pane on the left-hand side, locate the Crystal report you want to schedule. Select the report title by clicking on it.

3. Click **Actions** and select **Schedule**.
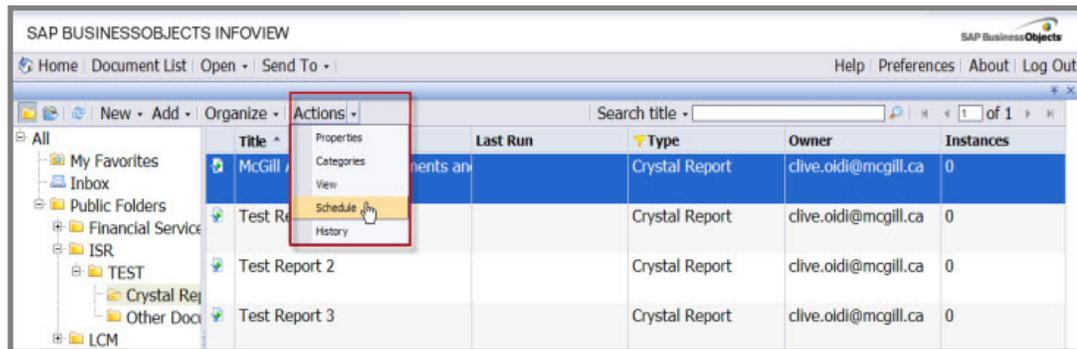
4. You will be presented with different options to schedule your report, as shown below. Set the options to run the report at the scheduled time; a new instance of the report is then created.

Schedule Options:

Click on the option(s) that you need from the panel on the left-hand side. Once you have set up all the option(s) you need, click **Schedule** at the bottom of the screen to schedule the report.

Instance Title: type the name to be used for each scheduled instance of the report.
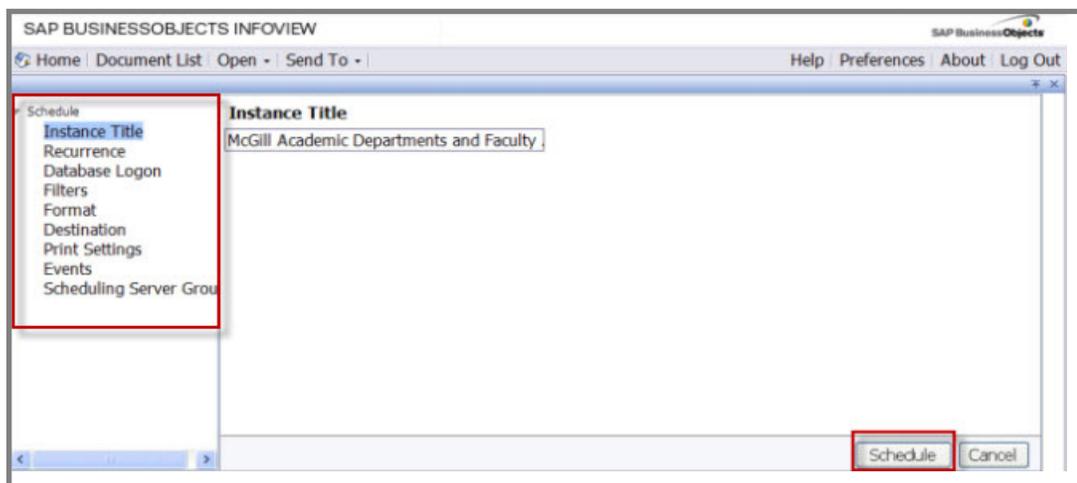
Recurrence: specify a schedule for running the report. (e.g. Now, Daily, Weekly). Depending on what recurrence schedule you select, you may have to enter more information. For example, in the screen below this report is run weekly and the day(s) of the week, the Start Date/Time and End Date/Time will have to be entered.

Database Logon: This needs to be entered if the report requires a logon to a database. This needs to be done before you can successfully schedule it.

Filters: do not use at the present time.

Format: Select **Crystal Reports** from the list, as shown below.
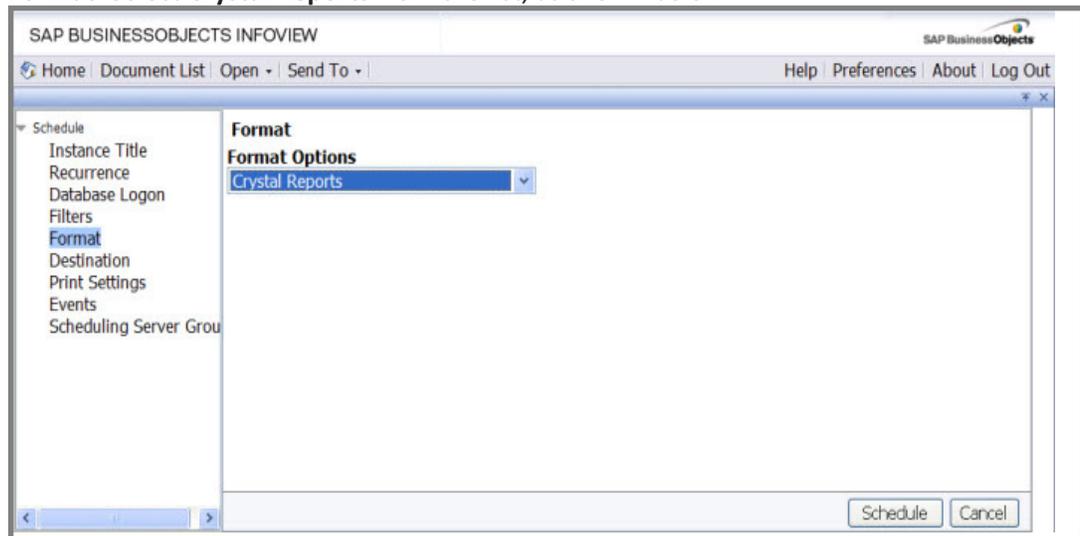
Destination: You can schedule a report instance to be sent to a specific destination (e.g. email). For this purpose, select **Business Objects Inbox** as shown in the screen below.
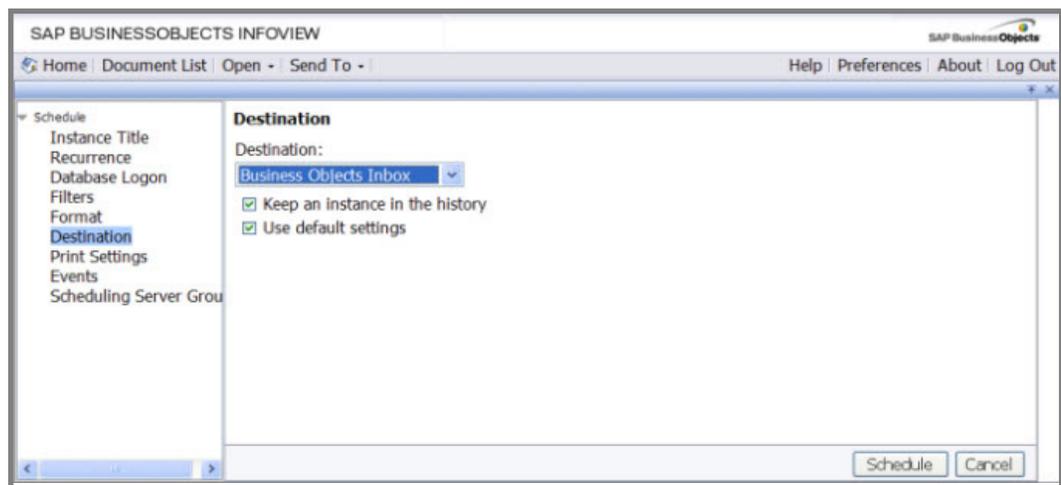
Print Settings: to set the print settings for a Crystal report. Keep as shown below:
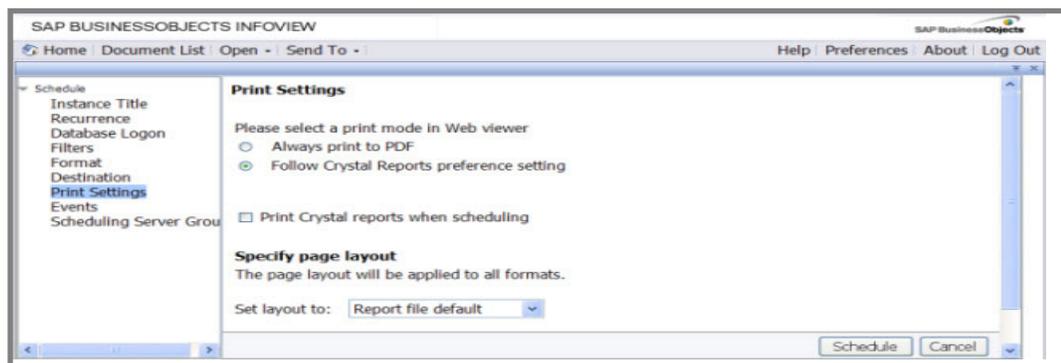
Events: do not use at the present time.

Scheduling Server Group: Keep the default **'Use the first available server", as shown below.**

Once you have set up the option(s), ensure that you click **Schedule** at the bottom of the screen to schedule the report.