
The McGill logo, featuring the word "McGill" in a red, serif font, oriented vertically.

InfoView and LCM for Power Users BOE Crystal Reports

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Introduction

Crystal reports are created using the Crystal Reports Developer desktop version. The recommended version is Crystal 2008 with Service Pack 2 or higher. Crystal reports must be tested with the desktop version before publishing it to the Business Object Environment (BOE) QA environment.

Once the Crystal report is tested within the desktop version, publish it to Business Object Environment (BOE) QA environment using InfoView. Within InfoView, you can also view the Crystal report and schedule it to run automatically at specified times.

When the report is ready to be promoted to Production, use BOE Life Cycle Management (LCM).

The following user guide is to explain the procedure to do the following:

- Log in to InfoView
- Understand the InfoView main menu
- Publish a Crystal report to BOE using InfoView
- View a Crystal report in BOE using InfoView
- View an older instance of a Crystal report in BOE using InfoView
- Schedule a Crystal report in BOE using InfoView.
- Log in to Life Cycle Management (LCM)
- Promote a Crystal Report from QA to the Production system using LCM



BOE Development environment is reserved solely for NCS to test upgrades, patches, etc.



InfoView

Log in to InfoView

Once a Crystal report is created and tested with a desktop version, it can be published to the BOE (Business Object Environment) QA environment using InfoView:

To log in to InfoView QA environment:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and type the following URL: <https://qreport1.campus.mcgill.ca/InfoViewApp>
2. 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**.
3. Click **Log On**.

SAP BusinessObjects

Log On to InfoView

[Help](#)

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

McGill Username:

McGill Password:

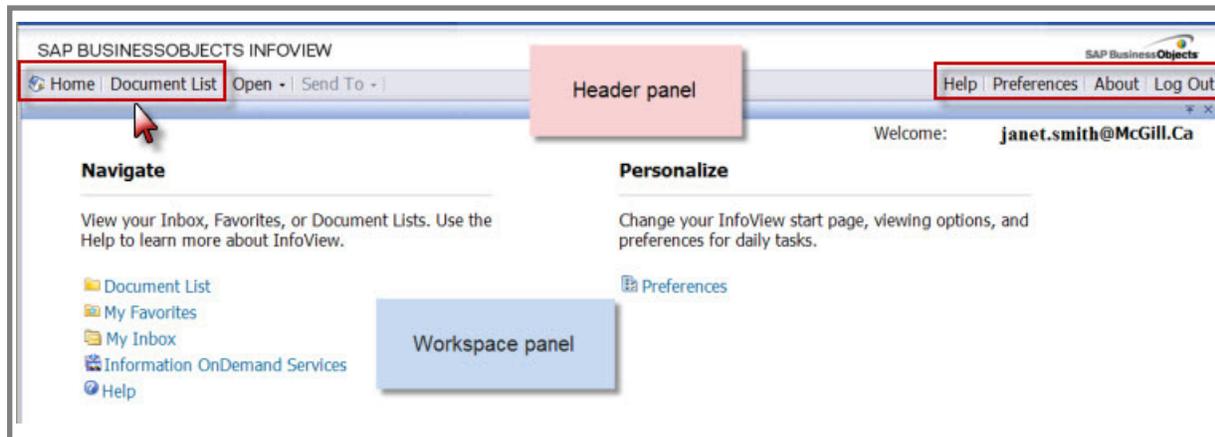
Authentication: ▼

* **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 on **Document List** to locate a report in the folders that you have rights to.
- Click **Help** to display the online help for InfoView.
- Click **Preferences** to set 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** (this allows you to open components of InfoView).

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

- Publish, view and schedule reports.
- Browse the Document List.



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



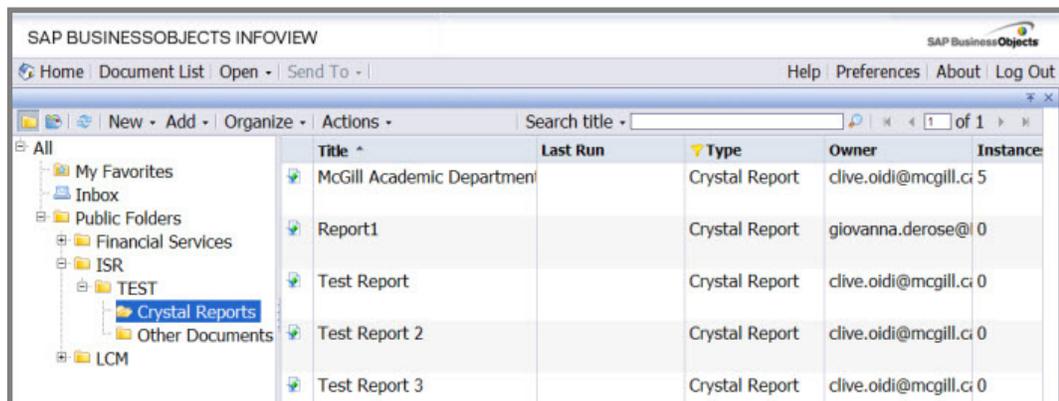
Publish a Crystal report to BOE QA using InfoView

From the Header panel of the InfoView main menu:

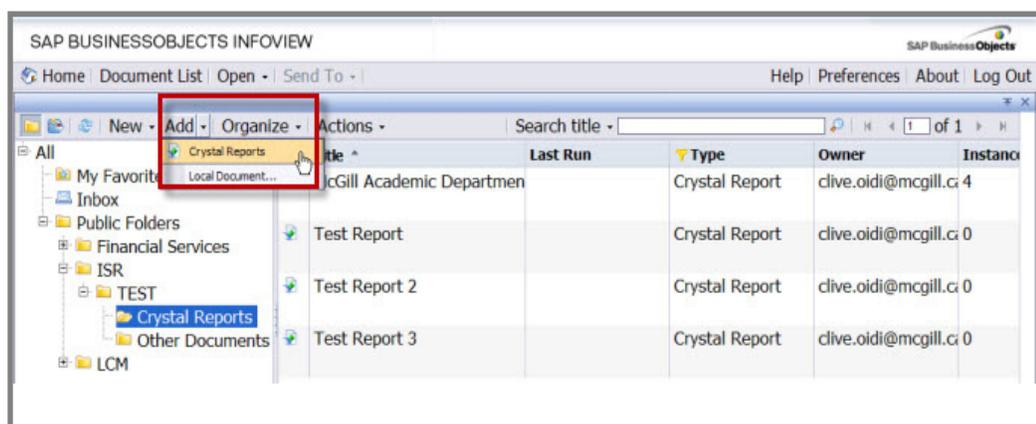
1. Click **Document List** from the InfoView toolbar. All the folders that you have been given access to will display.



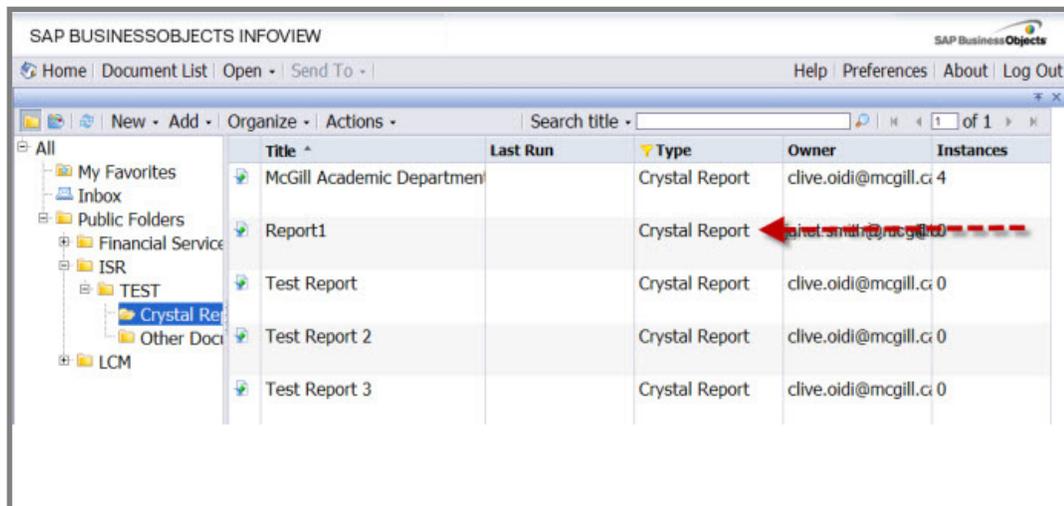
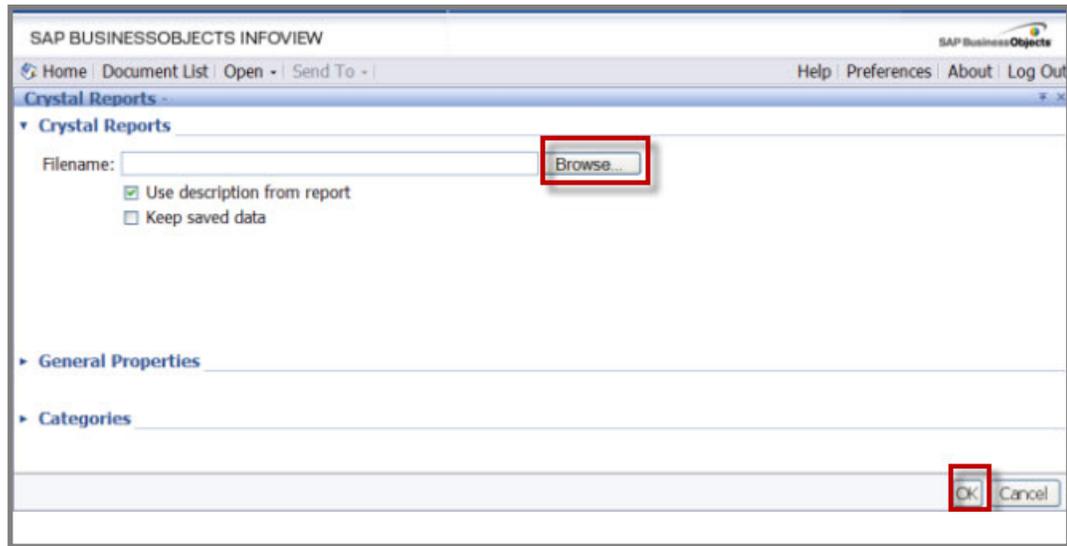
2. Using **Public Folders** from the pane on the left-hand side, locate and click on the folder where you want to publish the Crystal report.



3. Click on **Add** and select **Crystal Reports** as shown below.



4. Using the **Filename** field, click on the **Browse** button to find the report you want to publish.
5. Click the **OK** button. The report will then appear in the specified folder.



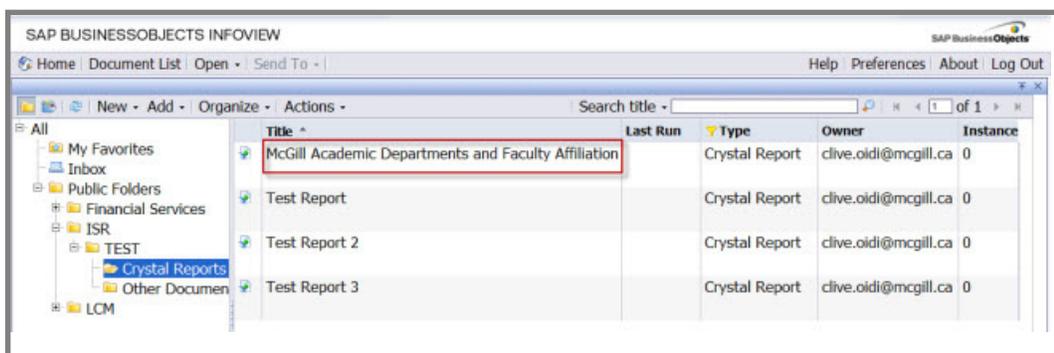
View a Crystal report in BOE QA using InfoView

From the Header panel of the InfoView main menu:

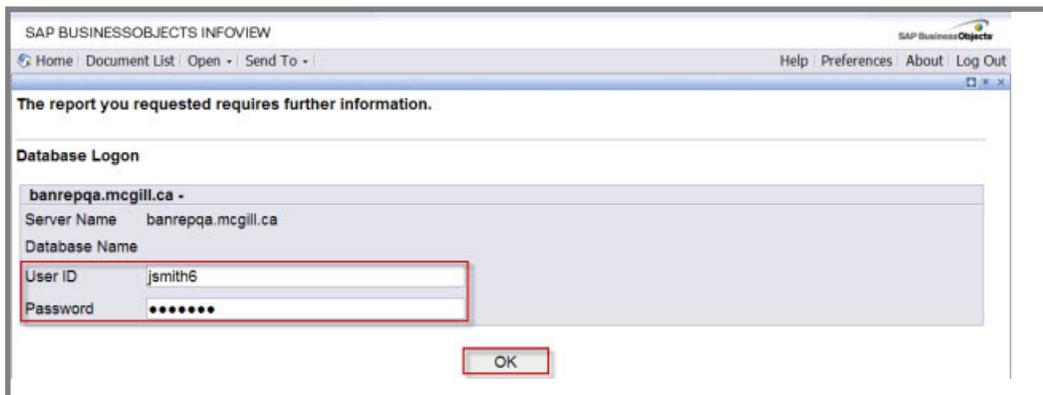
1. Click **Document List** from the InfoView toolbar. All the folders that you have been given access to will display.



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.

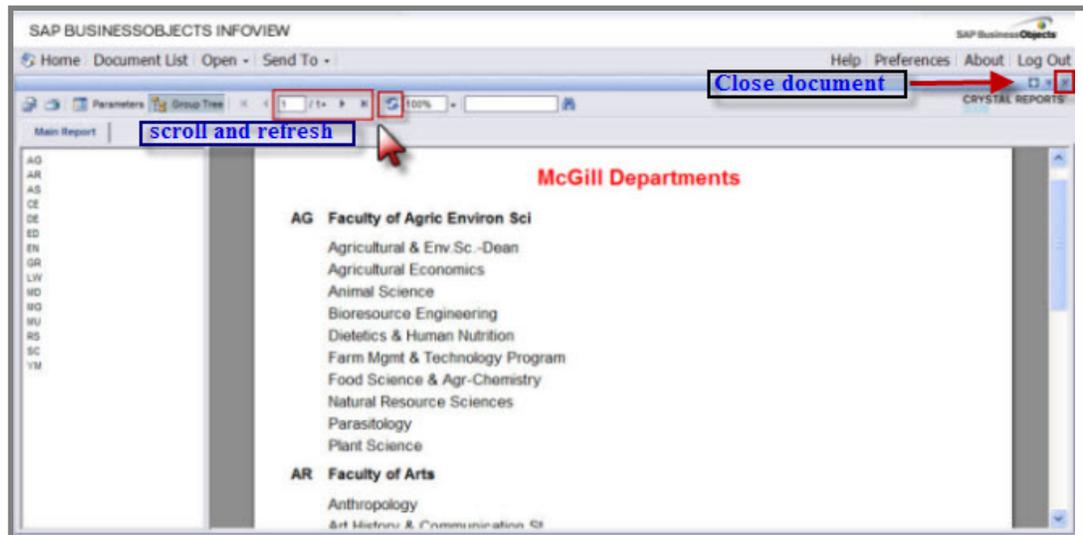


3. If the report requires a data source, a Database Logon page displays. Enter your credentials. For example, if your report is accessing data from the Banner Data Warehouse, you will be asked to enter your data warehouse credentials (Banner User ID and Password). Click **OK**.



4. For some reports, you may be prompted to enter other fields (e.g. fiscal year). Once you enter the field(s), click **OK** to view the report. The report will then 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 the **Close document** icon (the 'X' on the top right-hand side of screen).





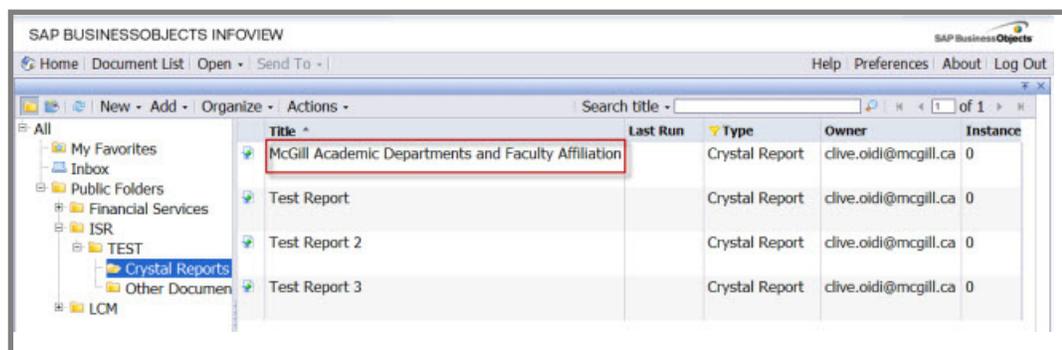
View an older instance of a Crystal report in BOE QA using InfoView

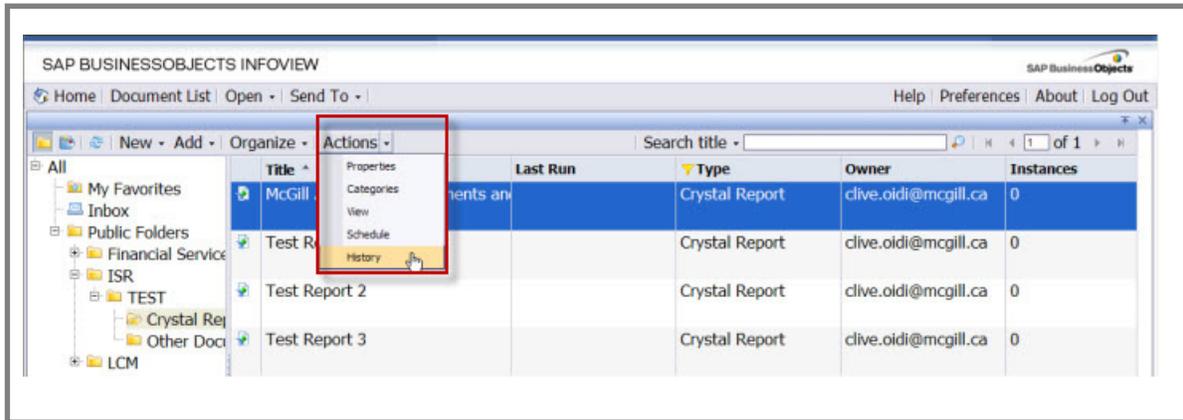
You can view an older instance of a Crystal report. From the Header panel of the InfoView main menu:

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



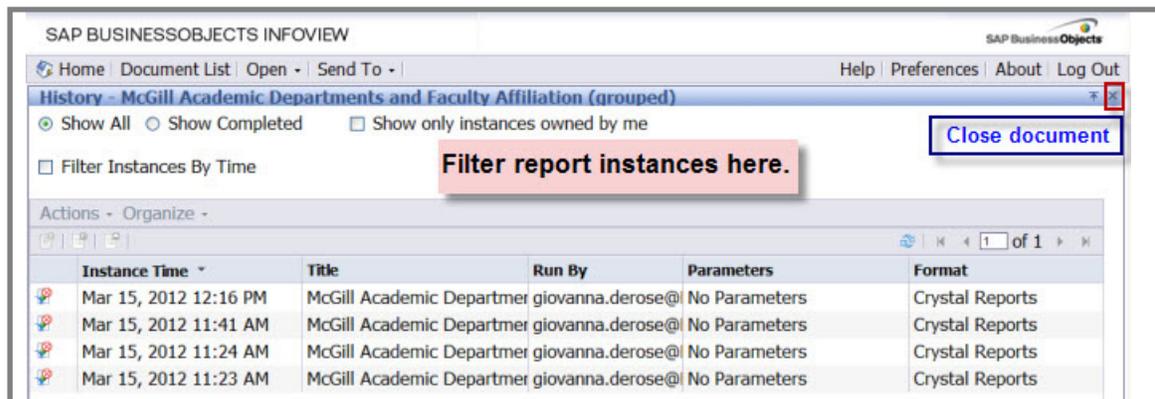
2. Using **Public Folders** from the pane on the left-hand side, locate the Crystal report you want to view. Select the report title by clicking on it.
3. Click **Actions** and select **History** as shown on the next page.





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 checkboxes.

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 QA using InfoView

You can schedule a report so it can run it 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 accessing **Actions > History** from the Header panel of the InfoView toolbar. For more information on instances, refer to the section on page 9 called 'View an older instance of a Crystal report in BOE QA using InfoView'.

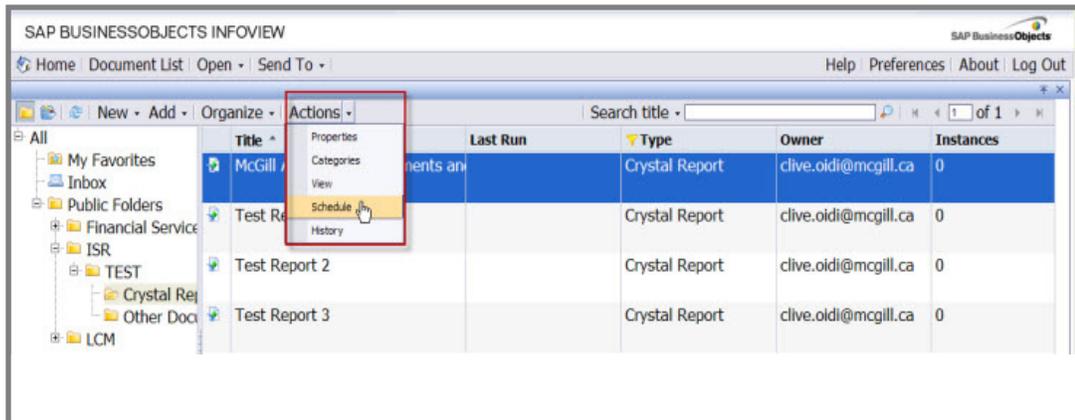


To schedule a Crystal report, from the Header panel of the InfoView main menu:

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**.

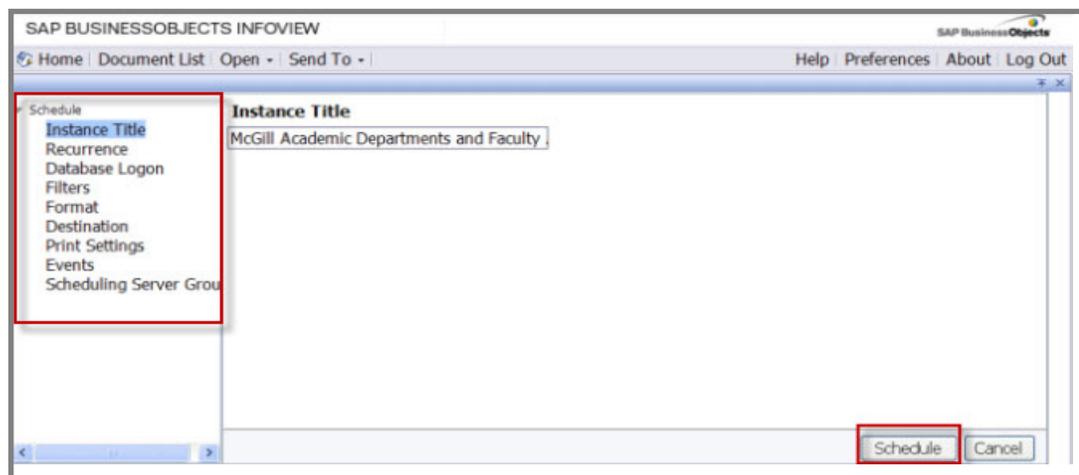


4. You will be presented with different options to schedule your report. Set up the options to run the report at the scheduled time; a new instance of the report is created.

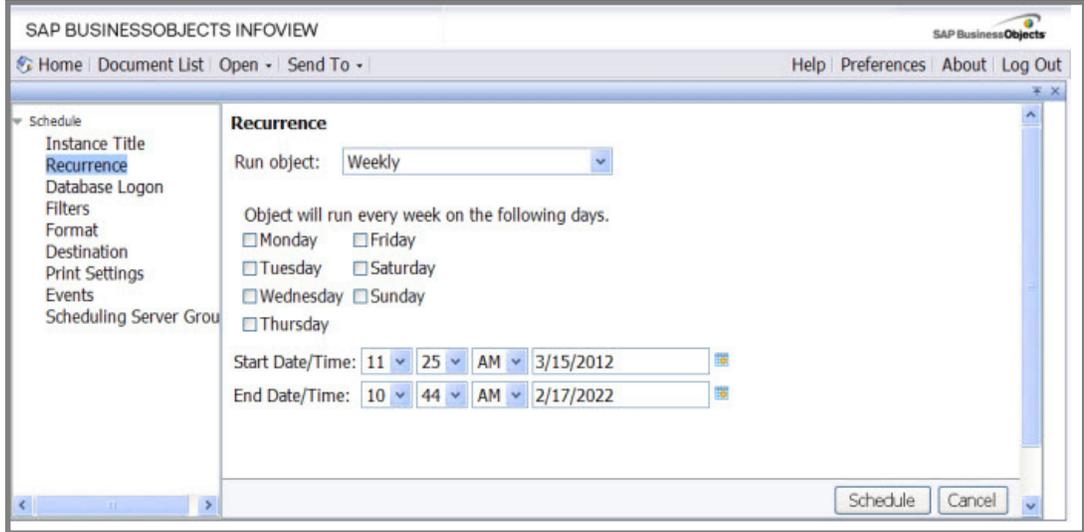
Schedule Options:

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

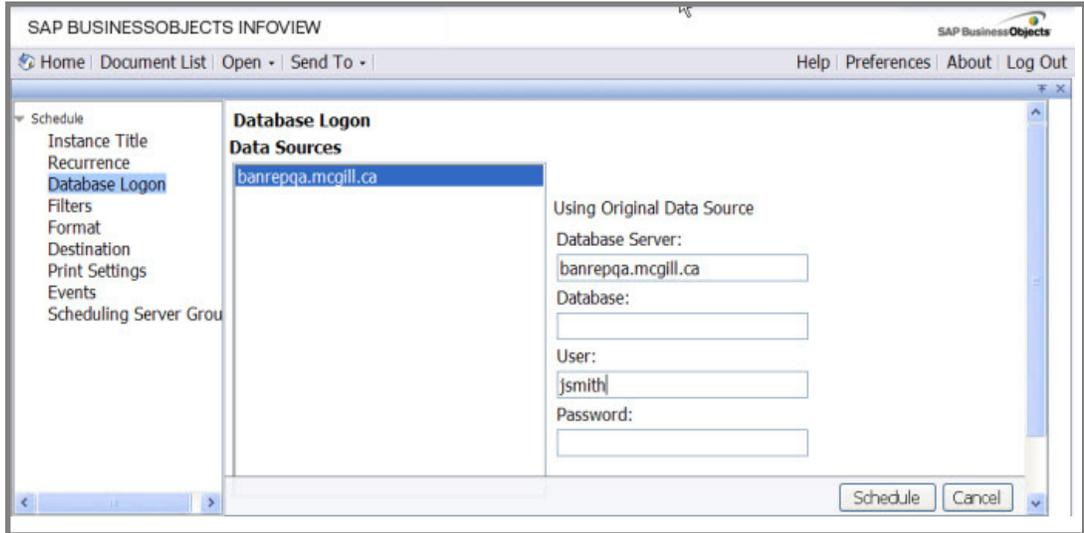
Instance Title: type the name to be used for each scheduled instance of the report.



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/Times will have to be entered.

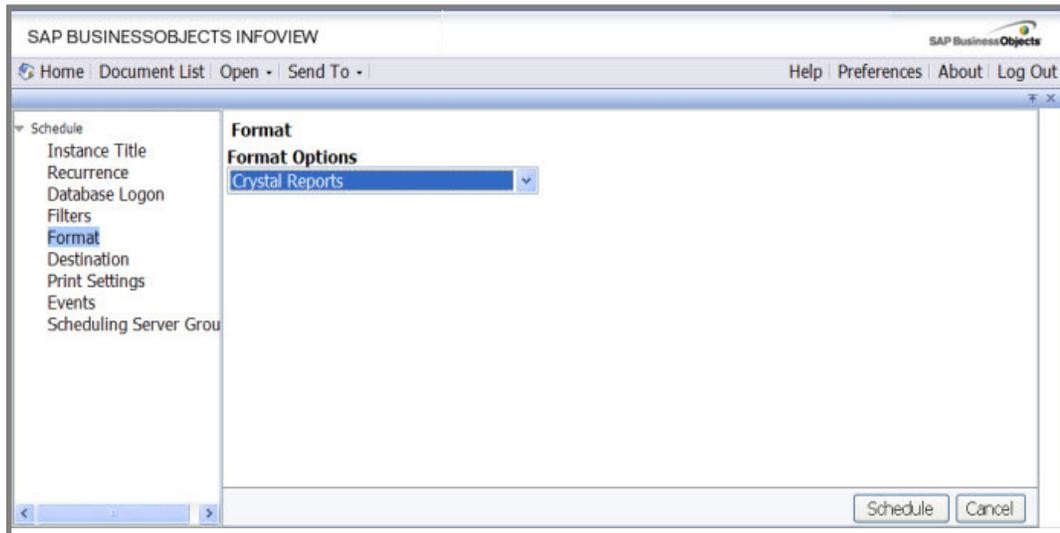


Database Logon: This needs to be entered if the report requires a logon to a database. This needs to be done before you can successfully schedule it.

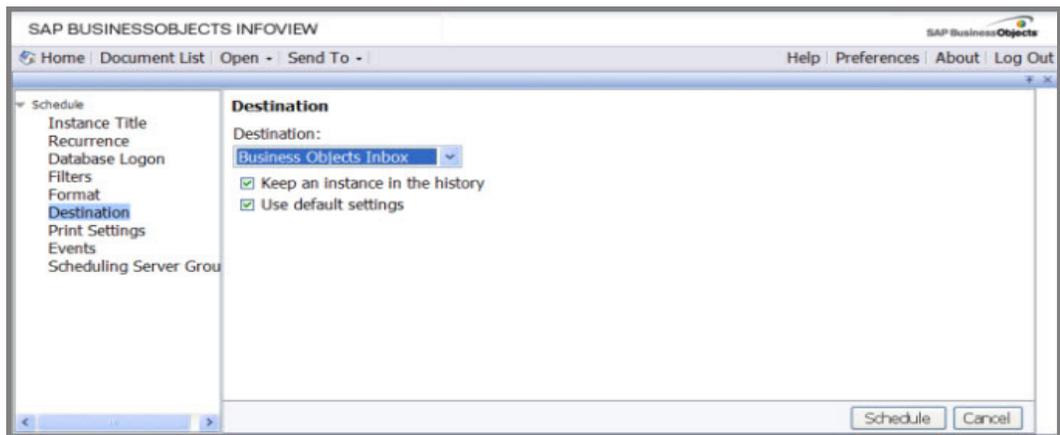


Filters: do not use at the present time.

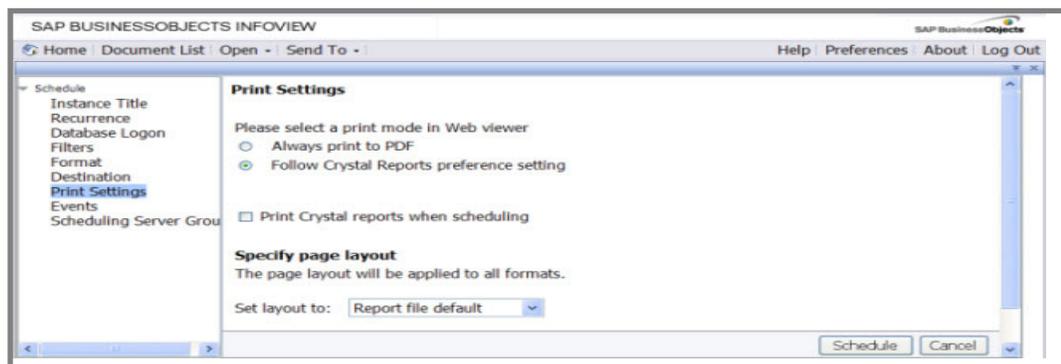
Format: Select **Crystal Reports** from the list.



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.

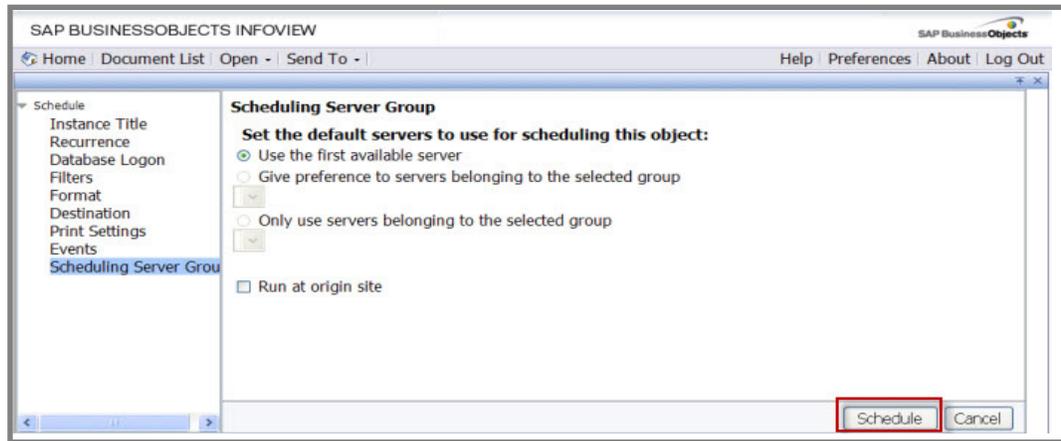


Print Settings: to set the print settings for a Crystal report. Keep as follows:



Events: do not use at the present time.

Scheduling Server Group: Keep the default **‘Use the first available server’**”.



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

Life Cycle Management

To promote the Crystal report to the Production system. To do this, you will use BOE Life Cycle Management (LCM).

Log in to LCM

To log in to LCM:

1. Open your web browser (i.e. Internet Explorer, Firefox or Safari) and type one of the following URL, depending on the environment you wish to access:

For production, access <https://preport1.campus.mcgill.ca/LCM/>

For QA, access <https://qreport1.campus.mcgill.ca/LCM>

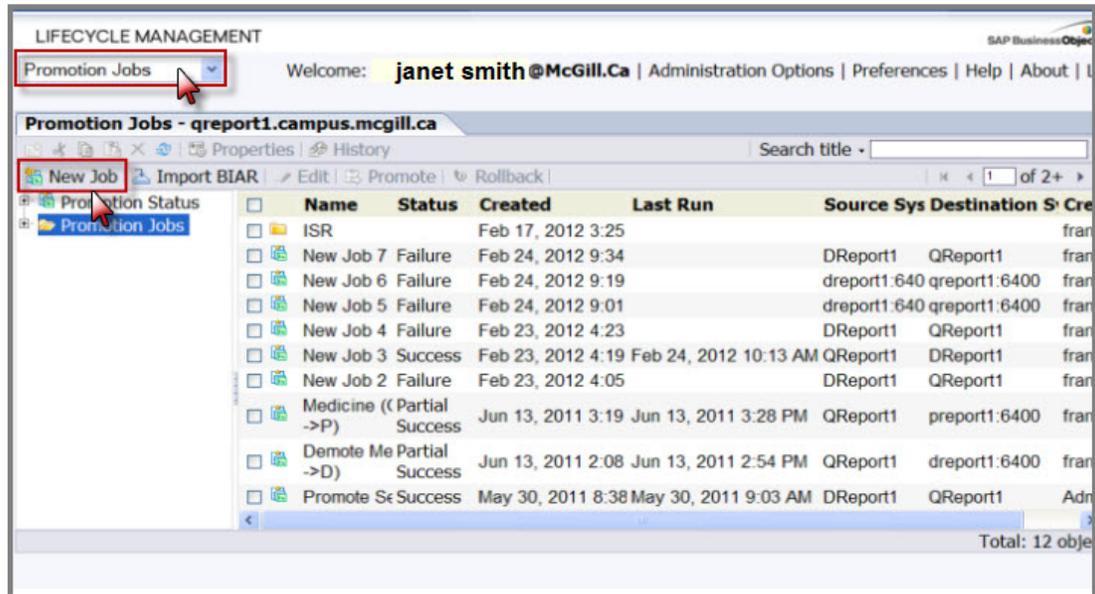
2. The **Log On to Lifecycle Management** screen opens. The **System** field determines if you are in the QA or Production environment.
3. Enter your ***McGill Username** and **McGill Password** in the corresponding fields. Ensure that the Authentication field is **LDAP**.
4. Click **Log On**.

* **McGill username and McGill Password:** for more information, go to <http://kb.mcgill.ca/it/easylink/article.html?id=1006>



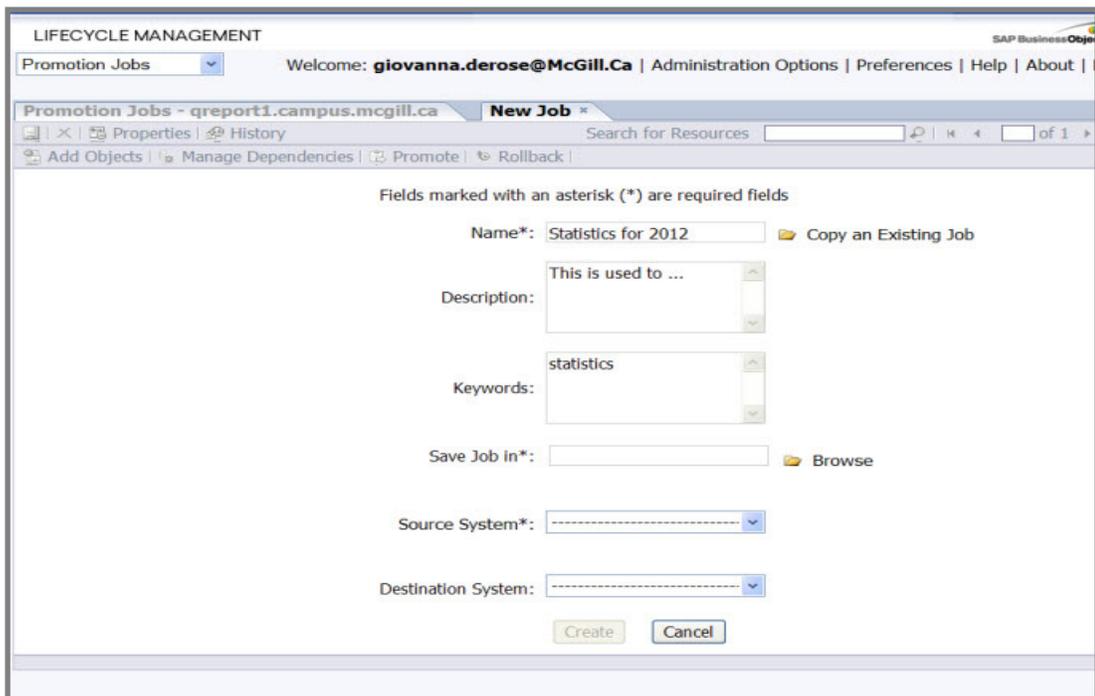
Promote a Crystal Report from QA to Production

Upon successful log in, the LIFECYCLE MANAGEMENT Promotion Jobs page displays:



Ensure that the field located on the top right-hand of the screen displays 'Promotion Jobs'.

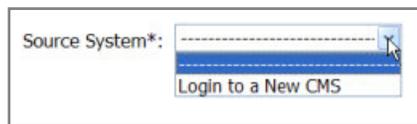
From the **Promotion Jobs** home page, click on the icon located on the top left-hand side of the toolbar called 'New Job' as shown above. This opens another window as displayed below:



1. Enter the fields for the report you want to promote to Production:
 - Name
 - Description
 - Keywords
2. In the **Save Job in** field, click on the word **Browse** to select the folder where you want to save the job. 
3. After selecting the folder, click **OK** to close the dialog box. The folder name will now appear in the **Save Job in** field.



4. In the **Source System** field, select **Login to a new CMS**.



The **Login To System** screen appears. Fill in the fields as shown below. The System field **QReport1** indicates the QA environment. Enter your McGill Username, McGill Password, and Authentication field **LDAP**. Click **Login**. The **Source System** field will populate.



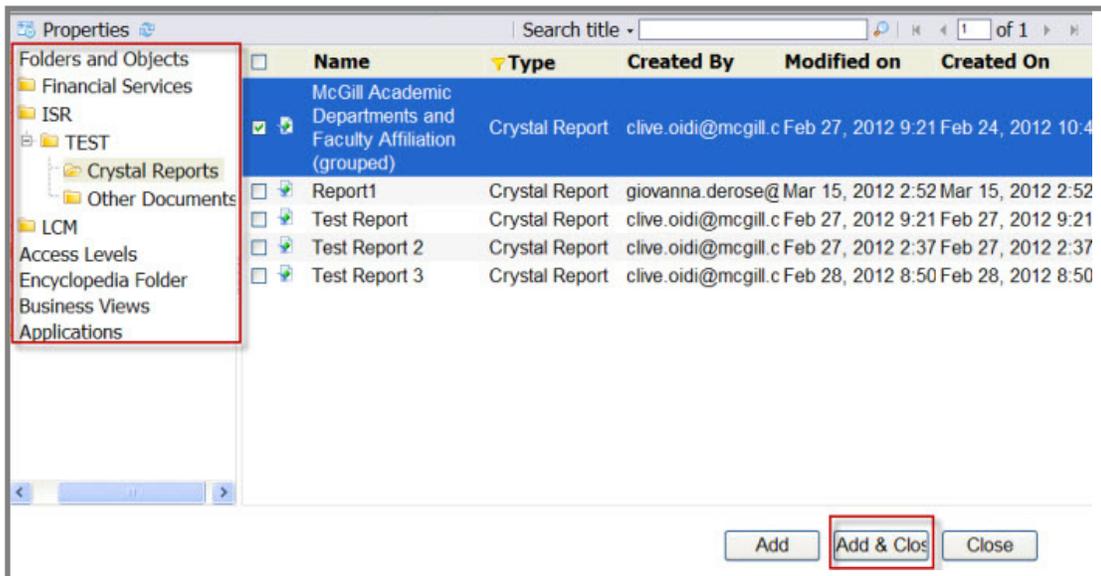
5. In the Destination System, select **Login to a new CMS**.

The **Login To System** screen appears. Fill in the fields as shown below. The System field **preport1:6400** indicates the Production environment. Enter your McGill Username, McGill Password, and Authentication field **LDAP**. Click **Login**. The **Destination System** field will populate.

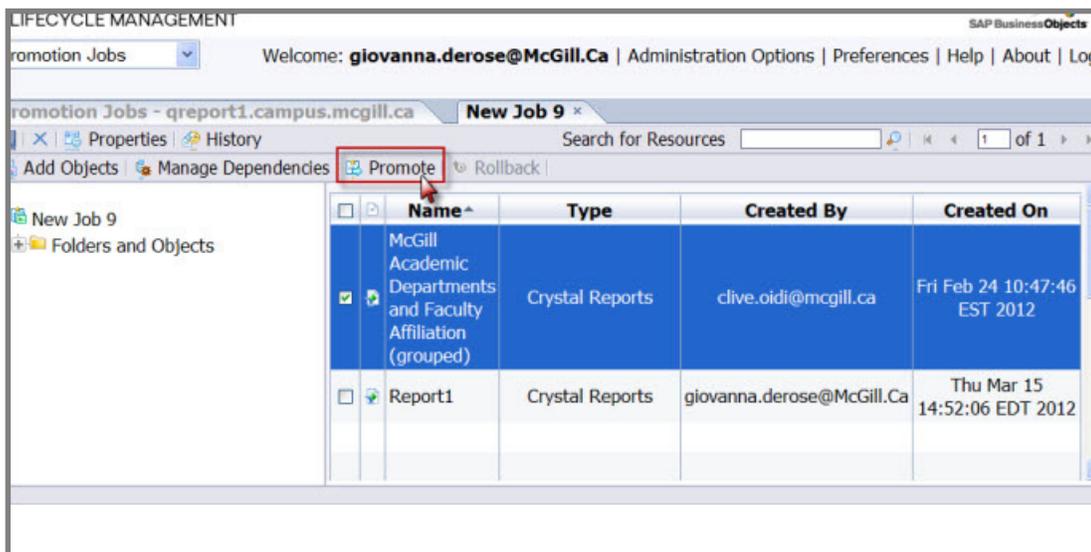
The **Promotion Jobs** home page will now be filled in with the values you selected or typed in using the above steps. Click on the **Create** button.

The following screen displays. Perform the following steps:

1. Navigate to the folder that contains the Crystal report(s) you want to promote to the Production system.
2. Select the report(s) from the workspace panel by clicking in the box(es) next to the report(s). The report(s) is now highlighted.
3. Click **Add & Close**.

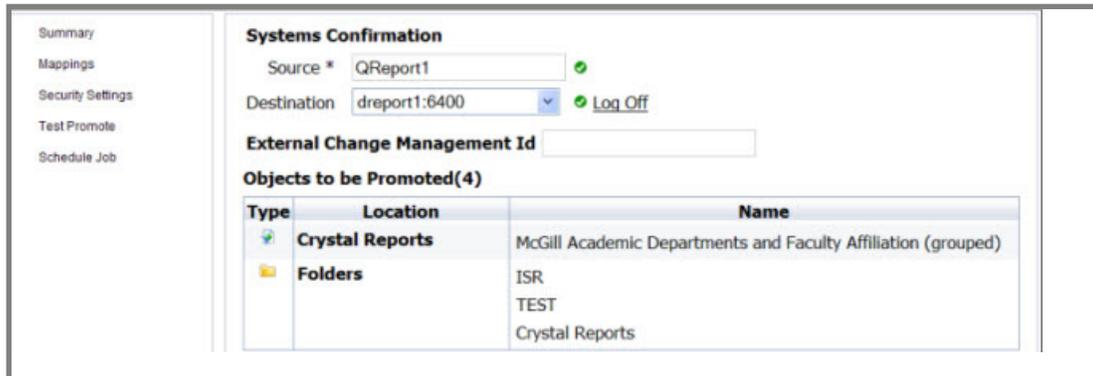


4. Select the report(s) and click **Promote** from the toolbar.



The following screen displays the Summary page to indicate that the report is successfully promoted from QA to Production.

- View that the information in the **Source** and **Destination** fields are correct
- Ensure that the field **External Change Management Id** is blank



Systems Confirmation

Source * QReport1

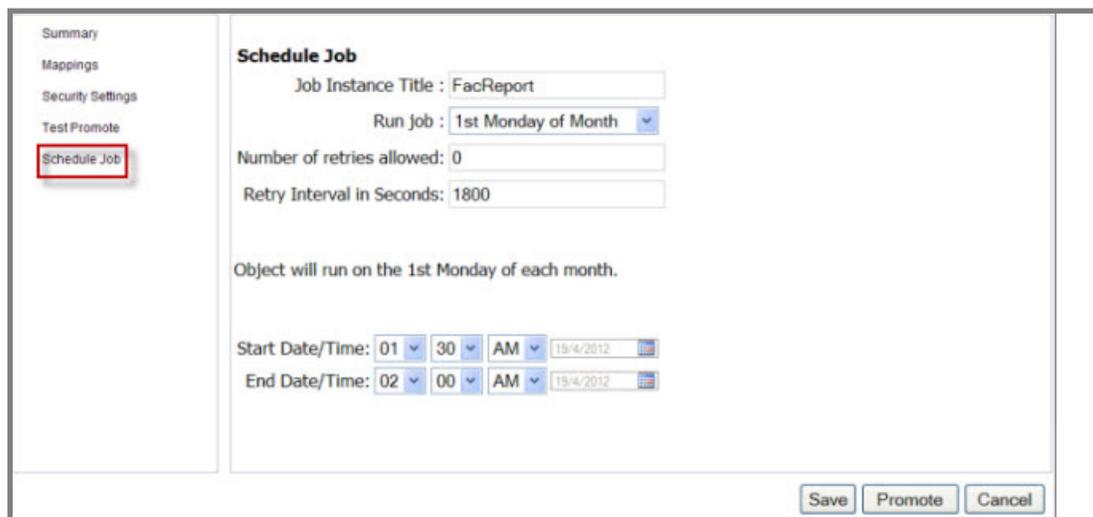
Destination dreport1:6400 [Log Off](#)

External Change Management Id

Objects to be Promoted(4)

Type	Location	Name
Crystal Reports		McGill Academic Departments and Faculty Affiliation (grouped)
Folders		ISR
		TEST
		Crystal Reports

- To schedule this promotion, click **Schedule Job** from the panel on the left-hand side. Specify a schedule by selecting the appropriate **Run job** field (e.g. daily, weekly, monthly). Depending on what you select, you may have to enter more information. For example, in the screen below this report is run on the first Monday of the month. The Start Date/Time and End Date/Times will have to be entered. Click **Promote**.



Schedule Job

Job Instance Title : FacReport

Run Job : 1st Monday of Month

Number of retries allowed: 0

Retry Interval in Seconds: 1800

Object will run on the 1st Monday of each month.

Start Date/Time: 01 : 30 : AM 19/4/2012

End Date/Time: 02 : 00 : AM 19/4/2012

Save Promote Cancel