

Personalize your CA Service Desk Manager Web Intelligence Reports with CA Business Intelligence (CABI) Infoview

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Welcome

Webinar Four in Seven-Part Series on using CABI with SDM

- Linda Baumeister, CA Education Moderator
- Series runs through May 17
- 1 hour sessions, except 5/15, which is 1.5 hrs.

Simplifying
Installation &
Configuration of
CABI and SDM

TODAY – 11 –
12:30 EDT

Using LDAP to
Secure Your CA
Service Desk
Manager
Reporting Access

Thursday, May 3
11 – 12 EDT

Using Designer
and Universe to
Empower non
Technical End
Users

Tuesday, May 8
11 – 12 EDT

Personalizing
your Web
Reports with
Infoview

Thursday, May 10
11 – 12 EDT

Maximize your
Engines with
Offline Reporting

Tuesday, May 15
11 – 12:30 EDT








Reporting
Troubleshooting
Tips: Part I

Wednesday, May
16 – 11 – 12 EDT

Reporting
Troubleshooting
Tips: Part 2

Thursday, May 17
11 – 12 EDT

Logistics

1	Download handouts   Feedback: 
2	Submit questions to Q/A folder; conduct Q/A at end of session  Meeting Recording
3	Twitter users can tweet using - #CABITips
4	Report issues during the session using Live Meeting Chat or   Feedback: 
5	Session is being recorded and available after session via email
6	Provide feedback via post evaluation survey sent through email
7	Lines are muted

Personalize your Web Intelligence Reports with CABI Infoview

Meet the CA BI/SDM Subject Matter Experts

Tunji Abiri

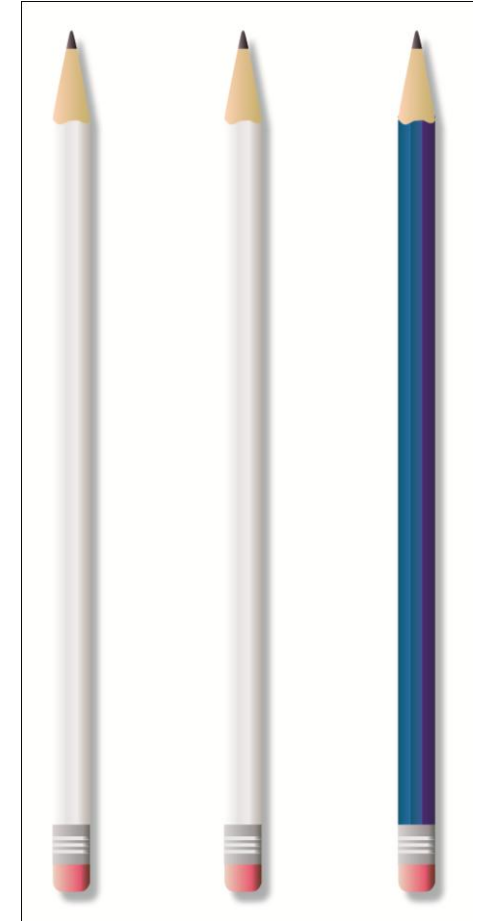


- Sr. Support Engineer located in Ditton Park, UK
- Financial Systems Administrator at National Health Services
- Joined CA Technologies in 1997
- Began supporting Service Desk Manager in 2002
- Kings College London (KQC) University of London – BSc (Hons) Physics

Personalize your Web Intelligence Reports with CABI Infoview

Webinar Summary

This Webinar will show how to run a standard CA SDM reports as well as create new Web Intelligence documents. The session also includes tips on personalizing your Infoview environment, scheduling reports, and exporting reports into Microsoft Excel files.



Personalize your Web Intelligence Reports with CABI Infoview

Webinar Objectives

This webinar will show you how to:

- Run Standard SDM reports from InfoView
- Create Web Intelligence (WEBI) Documents
- Add WEBI Documents to SDM Reports tab
- Schedule reports
- Personalize InfoView

Why you need to know:

- Site specific reports
- Schedule reports to run
 - At more appropriate time
 - In different output formats
- Manage and test both old and new reports



Personalize your Web Intelligence Reports with CABI Infoview

Webinar Map

- 1 Accessing Infoview
- 2 Running Service Desk reports in InfoView
- 3 Creating and running Web Intelligence docs
- 4 Scheduling Reports
- 5 Adding a Web Intelligence doc to Report tab
- 6 Personalizing InfoView environment

Personalize your Web Intelligence Reports with CABI Infoview

What is CABI InfoView?

#CABITips

CABI InfoView

- A central web environment allows users to easily find documents & information
- Navigate using an integrated search facility and folder navigation tree
- Personalize their experience by customizing:
 - The folder or document to view at login
 - Preferred language
 - Level of interaction for different information

Note: Business Analysts may choose interactive views of information, while others such as Business Managers might prefer a more static summary view. The My InfoView feature allows for the creation of a personalized starting page.

Personalize your Web Intelligence Reports with CABI Infoview

How do you access InfoView?

Accessing Infoview

- Requires a supported web browser and Java runtime environment
- Users are required to provide login credentials to successfully log into InfoView

<http://<servername>:<port>/InfoViewApp/logon.jsp>

- Demo will show how to create and run Web Intelligence reports
 - Covers creation of simple reports
 - Custom report writing will not be covered in this webinar

Personalize your Web Intelligence Reports with CABI Infoview

Accessing InfoView

infoView button

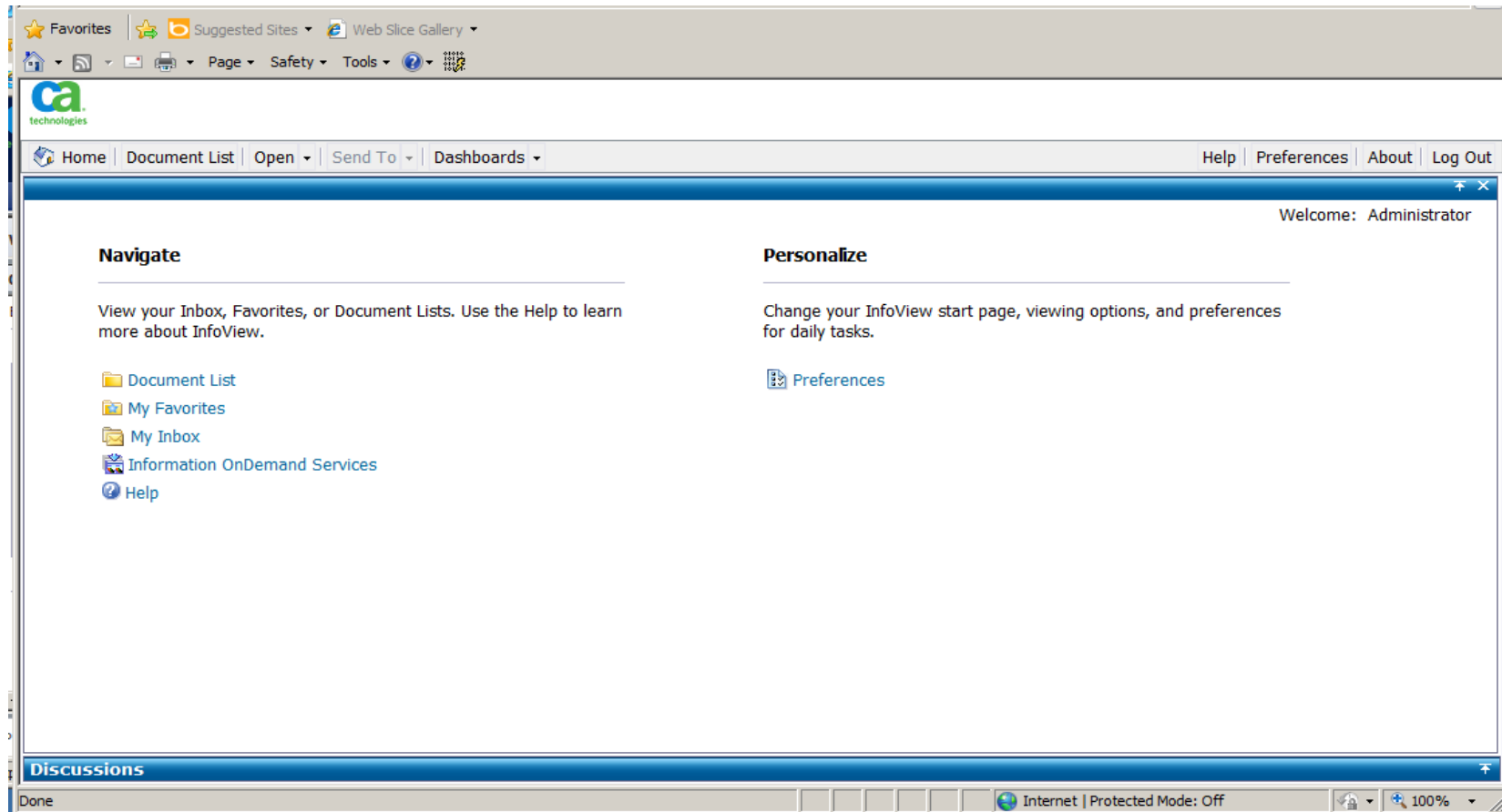
The screenshot displays the CA Service Desk Manager web interface. At the top, the 'CA Service Desk Manager' logo is on the left, and a search bar with 'Incident' and a 'Go' button is on the right. Below the search bar, the user is logged in as 'Administrator' with a 'Log Out' link and a 'Set Role' button. The main navigation bar includes tabs for 'Service Desk', 'Knowledge', 'Administration', 'Reports', 'Change Calendar', and 'Support Automation'. The 'Reports' tab is selected, showing a 'Web Report' section. In the top right of this section, the 'InfoView' button is highlighted. The 'Web Report' section is divided into two panes. The left pane, titled 'Overall Summary', contains a form for entering prompt values, including fields for 'Start of Range' and 'End of Range' with date format instructions. The right pane, titled 'Asset List', shows a tree view with 'Hardware.Workstation' selected, displaying a table of assets.

Number	Name
	spctng012kt
	spctng012kb
	spctng012k8

Personalize your Web Intelligence Reports with CABI Infoview

Accessing InfoView #CABITips

infoView button



Personalize your Web Intelligence Reports with CABI Infoview

CABI Supported Web Browsers

Browser OS	Web Browser	JVM
Apple Mac OS X	Firefox 3.0	Apple 1.5.0_xx Apple 1.6.0_xx
	Firefox 3.5	Apple 1.5.0_xx Apple 1.6.0_xx
	Safari 3.2.x	Apple 1.5.0_xx Apple 1.6.0_xx
	Safari 4.0.3+	Apple 1.5.0_xx Apple 1.6.0_xx
Microsoft Windows	Firefox 3.0	Sun 1.5.0_xx Sun 1.6.0_02+
	Firefox 3.5	Sun 1.5.0_xx Sun 1.6.0_xx
	IE 6.0 SP2/SP3	Sun 1.5.0_xx Sun 1.6.0_02+
	IE 7.0	Sun 1.5.0_xx Sun 1.6.0_02+
	IE 8.0	Sun 1.6.0_xx
	** IE 9.0 (requires SP5)	Sun 1.6.0_xx



Personalize your Web Intelligence Reports with CABI Infoview

Demonstration

In this demo we will see:

- How to run standard CA SDM Reports in InfoView
- How to navigate through InfoView
 - Access the CA SDM folder to select
 - Asset List
 - Active Incident by Priority Detail



Note: CA SDM Implementation Guide (TEC520339)

Personalize your Web Intelligence Reports with CABI Infoview

What is Web Intelligence?

#CABITips

A few facts about Web Intelligence

- A tool for analyzing business information and creating ad-hoc reports
- Provides an easy-to-use interface for analyzing data in a data warehouse
 - Helps with decision-making business process
- Capabilities range from basic and simple to very complex reports
- Allows users to share the information throughout the enterprise easily
- Business Analysts access the information using everyday business vocabulary
 - No need to understand technical way info is stored in the data warehouse
- Web Intelligence is accessed from InfoView via an internet browser
 - Create and edit Web Intelligence documents & analyze data displayed
 - Using InfoView share with other users, schedule, print or email

Personalize your Web Intelligence Reports with CABI Infoview

Installing the Java Report Panel

The Java Virtual Machine

- First time creating a Web Intelligence Document
 - Will be prompted to install the Java Virtual Machine
 - JRE 6.0 Update 3 will be installed
 - Java Report Panel will ask whether to “Always Trust” content from publisher

Personalize your Web Intelligence Reports with CABI Infoview Demonstration

In this demo we will see:

- How to create/run Web Intelligence Document via InfoView



Personalize your Web Intelligence Reports with CABI Infoview

Scheduling Reports

#CABITips

Configuring Business Objects servers for email

- Scheduled report instances can be sent as an email to a user
 - Configure the Crystal Reports, Destination, and Adaptive Job Servers
 - via Central Management Console (CMC)

The steps to configure an email notification for Crystal Reports are:

1. Log in to the Central Management Console
2. Navigate to Servers, Server List
3. Double-click the Crystal Reports Job Server
4. On the left side of the page, click Destination
5. In the Destination drop-down, select Email and click Add

Personalize your Web Intelligence Reports with CABI Infoview Scheduling Reports

The steps to configure an email notification for Crystal Reports are:

6. Specify the following parameter values:

Domain Name	< Specifies the domain name of the SMTP server >
Host	< Specifies the host name or IP address of the SMTP server >
Authentication	< If SMTP requires authentication select Login from drop-down list >
User Name	< Specifies the user name for authentication >
Password	< Specifies the password for the user name for authentication>
From	< Specifies email address used to send notifications from CABI Server >

7. Click Save.

8. Click Close.

9. Repeat previous steps for Destination and Adaptive Job Server using the CMC

Note: If you leave the values blank, the report uses the Job Server default settings.

Personalize your Web Intelligence Reports with CABI Infoview

Scheduling Reports

Properties of Crystal Reports Job Server

CENTRAL MANAGEMENT CONSOLE Business Objects
an SAP

Properties: LODHD50051.CrystalReportsJobServer

Properties

- User Security
- Metrics
- Audit Events
- Destination
- Placeholders
- Existing Server Groups

Server Name:

ID, CUID: 825 , AZVpmZ0PzHFPvINRUjtFd2q

Node: SYSTEM

Description:

Command Line Parameters

-fg -restart -name CrystalReportsJobServer -ns 6400 -pidfile
\"F:/SC/CommonReporting/BusinessObjects Enterprise 12.0
\\serverpids\\LODHD50051_ .CrystalReportsJobServer.pid\""/>

Common Settings

Request Port: ☒ Auto assign

Host Identifiers:

Personalize your Web Intelligence Reports with CABI Infoview Scheduling Reports

Destination

CENTRAL MANAGEMENT CONSOLE Business Objects[®]
an SAP company

Loading...

Properties
User Security
Metrics
Audit Events
Destination
Placeholders
Existing Server Gro

Destination: File System
Business Objects Inbox
Email

Domain Name: TESTBED
Host: spctng012k8
Port: 25
Authentication: None
User Name:
Password:

Personalize your Web Intelligence Reports with CABI Infoview

Scheduling Reports

#CABITips

Scheduling options

Instance Title

Specifies a title for the instance. An instance can have a different name than the report. Every instance can have a unique title.

Recurrence

Specifies a schedule to execute the report. Available options include Now, Once, Hourly, Daily, Weekly, Monthly, Nth day of the month, and so forth.

Database Logon

Do not modify this option. Specifies the database login parameter for reports. The default database login parameter is Query 1 for most CA Service Desk Manager reports. This option uses the credentials of data direct ODBC connection to connect to the CA Service Desk Manager Object Manager.

Filters

Specifies custom formulas for record and group selection.

Personalize your Web Intelligence Reports with CABI Infoview

Scheduling Reports

Scheduling options

Format

Specifies the required reporting format for the instance. Report can be delivered in multiple formats, such as PDF, Excel, and so forth.

Destination

Specifies the destination for the scheduled instance. Scheduled instances can be sent or published to various destinations such as Default Enterprise Location, Inbox, File Location, FTP server, Email recipients, and so forth.

Print Settings

Specifies print settings to print an SAP Crystal Reports or Desktop Intelligence Report after an instance is generated.

Events

Specifies events for the instance. CA Business Intelligence can be configured so that reports are executed only after a specified event occurs. You can create and configure events in the Central Management Console.

Personalize your Web Intelligence Reports with CABI Infoview Demonstration

In this demo we will see:

- Reports scheduled to email and file destinations



Personalize your Web Intelligence Reports with CABI Infoview

Adding a Web Intelligence Document to Reports tab

Web Intelligence Documents in CA SDM

- Site specific Web Intelligence Documents may require wider availability
 - Not just in Infoview but as a report run from CA SDM
 - To make them available they must be added to Reports Tab

Note: See Technical document TEC505614 for details

Personalize your Web Intelligence Reports with CABI Infoview

Demonstration

#CABITips

In this demo we will see:

- Add a Web Intelligence Document to CA SDM Reports tab



Personalize your Web Intelligence Reports with CABI Infoview

Demonstration

In this demo we will see

- Change the look of InfoView
 - Personalize it to meet the needs of the user

Note: Users who don't want the default home page when they log into InfoView may choose to change this and other settings via the InfoView preferences menu selection.



Additional Resources

CA Service Desk Management Implementation Guide

<https://support.ca.com/cadocs/1/j027611e.pdf>

CA Service Desk Manager CABI Greenbook

https://support.ca.com/phpdocs/7/common/greenbooks/CA_Business_Intelligence_for_CAServDeskMgr_ENU.pdf

CA Business Intelligence Implementation Guide

[https://support.ca.com/cadocs/1/m002392e.pdf#search=%22business intelligence implementation guide%22](https://support.ca.com/cadocs/1/m002392e.pdf#search=%22business%20intelligence%20implementation%20guide%22)

SAP Business Objects Enterprise InfoView User's Guide

http://help.sap.com/businessobject/product_guides/boexir31SP3/en/xi31_sp3_bip_user_en.pdf

Question and Answer Session

- Open Q/A folder
- Lines Unmuted
- Recording stopped
- Presenter answer questions in Q/A folder

Closing

- Thank you, Tunji
- Watch for follow up email – link to session survey and session recording
- Additional Education
<http://www.ca.com/us/collateral/learning-paths/na/CA-Service-Desk-Manager-Learning-Paths.aspx>

CA Service Desk Manager r12.6 Learning Paths

Take charge of your path to success. Select a path based on your role, follow the suggested learning in the order we recommend, and also choose from common elective courses which suit your specific role. Where applicable, take advantage of accreditation exams focused on courses, and certification exams focused on bodies of knowledge.



Certification Exam

•Next session

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Reporting Troubleshooting Tips: Part I
Wednesday, May 16 – 11 – 12 EDT

Reporting Troubleshooting Tips: Part 2
Thursday, May 17
11 – 12 EDT

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