PUBLIC

How to Work with Analytical Portal

SAP Business One 9.3 PL00 and later, version for SAP HANA

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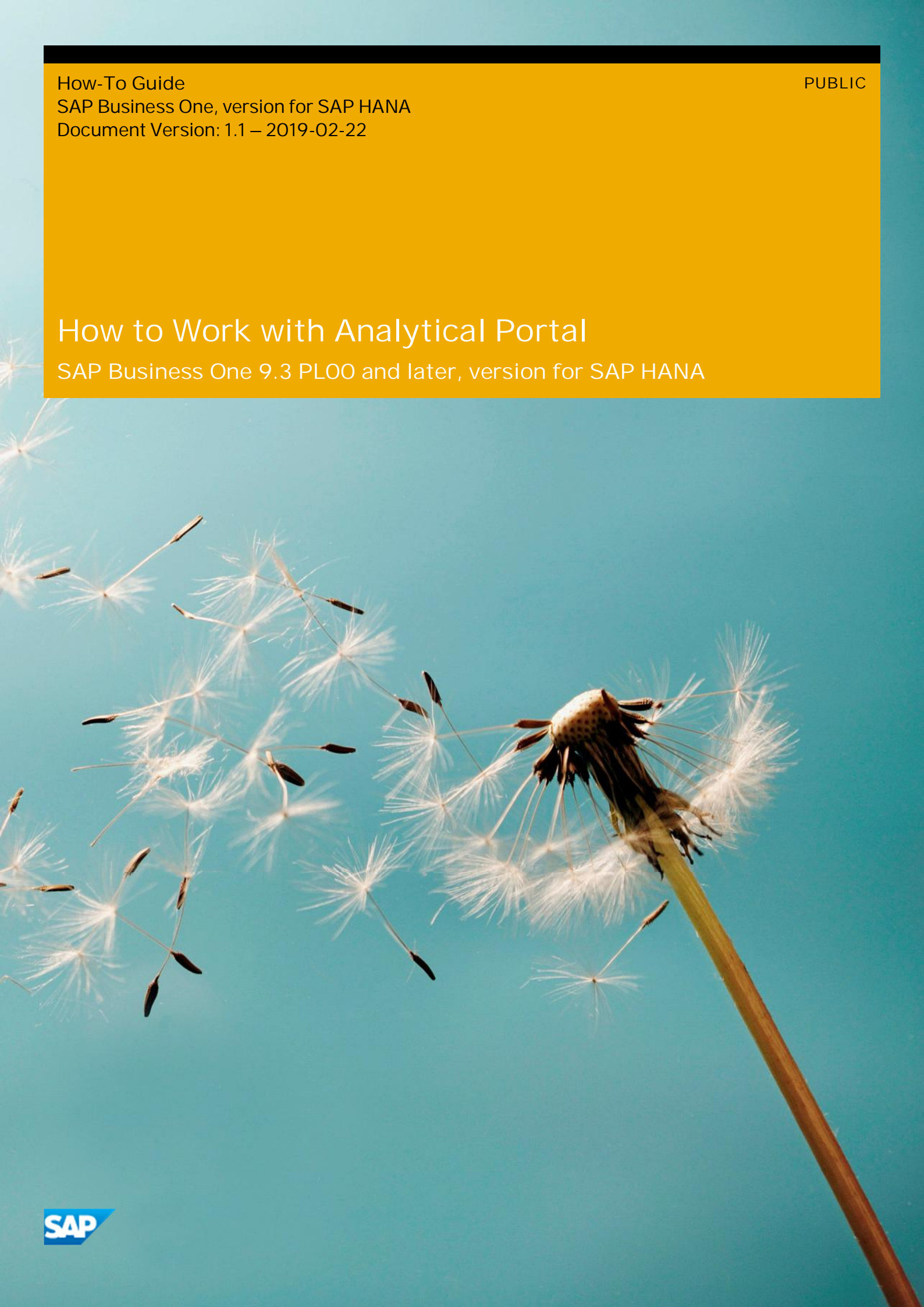
Typographic Conventions

Type Style	Description
Example	Words or characters quoted from the screen. These include field names, screen titles, pushbuttons labels, menu names, menu paths, and menu options. Textual cross-references to other documents.
Example	Emphasized words or expressions.
`EXAMPLE`	Technical names of system objects. These include report names, program names, transaction codes, table names, and key concepts of a programming language when they are surrounded by body text, for example, SELECT and INCLUDE.
`Example`	Output on the screen. This includes file and directory names and their paths, messages, names of variables and parameters, source text, and names of installation, upgrade and database tools.
`Example`	Exact user entry. These are words or characters that you enter in the system exactly as they appear in the documentation.
`<Example>`	Variable user entry. Angle brackets indicate that you replace these words and characters with appropriate entries to make entries in the system.
`EXAMPLE`	Keys on the keyboard, for example, F2 or ENTER.

Document History

Version	Date	Change
1.0	2017-07-11	First version.
1.1	2019-02-22	Guide updated with email settings. For more information, see Email Settings.

Table of Contents

1   Introduction

The Analytical Portal for SAP Business One, version for SAP HANA enables you to run your Crystal reports and Excel reports in real time through a web browser on your computer, tablet, or mobile device. With this portal, you can also schedule automatic report running and view report running history. It makes Crystal reports and Excel reports more accessible for the ones who have not installed the SAP Business One, version for SAP HANA client application or Microsoft Excel on their computer.

The Analytical Portal supports both SAP Business One, version for SAP HANA and SAP Business One Cloud. In the current version of the Analytical Portal, you can perform the following operations:

- Run a designed Crystal report or an Excel report
- Report scheduling
- Distribute report results via email
- Download report results to local
- Viewing reports running history

> ℹ️ Note
>
> To use the Analytical Portal, you must make sure that you have initialized the company database on the SAP HANA database server. For more information, look for *SAP Business One Administrator's Guide, version for SAP HANA*.

> ℹ️ Note
>
> The Analytical Portal does not provide report designing function. To change the design of a customized Excel report, use the Excel Report and Interactive Analysis designer; likewise, to change the design of a Crystal report, use the SAP Crystal Report designer.

2 Authorizations for the Analytical Portal

All the users who have the authorization of analytical features in SAP Business One, version for SAP HANA can access the analytical portal via SAML authentication.

> **i** Note
>
> For more information about authorizations required for Excel Reports, see *How to Work with Excel Report and Interactive Analysis in SAP Business One, version for SAP HANA*. For more information about authorizations required for Crystal Reports, see *How to Work with SAP Crystal Reports in SAP Business One*.

3 Logging on to a Company

Enter in the browser address box the URL for the Analytical Portal: https://<Server Name/IP>:<port> /Portal.

 i Note

In the above portal address, the default port number is 40000.

You can choose to log on in the System Landscape Directory (SLD) by entering the server address, choosing your company database, and entering your SAP Business One, version for SAP HANA user ID and password. The *Log On* page displays as below:
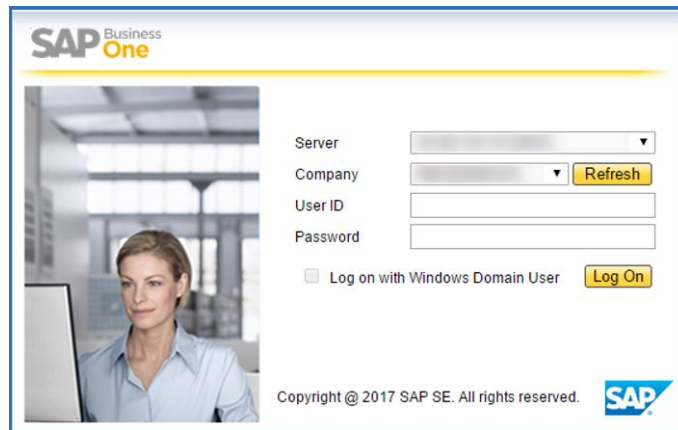
If your user account has been bound to a Microsoft Windows domain account, you can then use single sign-on (SSO). For more information about SSO, look for *SAP Business One Administrator's Guide, version for SAP HANA.*

The Analytical Portal automatically logs you off if there is no activity in the portal for 30 minutes.

4 Email Settings

In the Analytical Portal, to send a report result by email, you need to perform the following configuration in the SAP Business One, version for SAP HANA client:

- Email settings on the company level:

  1. From the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration → System Initialization → General Settings → Services* tab.

  2. On the *Services* tab, select the *Enable Company Specific Mailer Configuration* checkbox, and define the settings below. For more information about the specific settings, see the online help of SAP Business One, version for SAP HANA.

- Email settings on the users level:

  1. From the SAP Business One, version for SAP HANA *Main Menu*, choose *Administration → Setup → General → Users*.

  2. In the *Users - Setup* window, locate to the user from which you want to send the emails in the Analytical Portal, enter the email address in the *E-Mail* field. This email address will be the one that sends out the report results.

5 Viewing and Running a Report

5.1 Viewing All Reports

After logging on to the Analytical Portal, you can find in the left side menu three tabs: *All Reports*, *Favorite Reports*, and *Report Scheduling*.

i Note

> The *Favorite Reports* tab is grayed out when no reports are added as your favorite, and the *Report Scheduling* tab is grayed out when there are no scheduled tasks.

In the *All Reports* tab, you can find all the Excel reports and Crystal reports to which you have access, displayed in five predefined categories and other categories if applied.

The predefined categories are: *Purchasing*, *Sales*, *Customer Relationship Management, Inventory*, and *Financials*. Other categories appear when there are reports under it. You can expand or collapse the hierarchically distributed reports in each category.

Excel reports are displayed with the same hierarchy as in the SAP Business One, version for SAP HANA client, while all the Crystal reports are displayed in the first layer of each category.

Reports in this tab page are searchable by name.
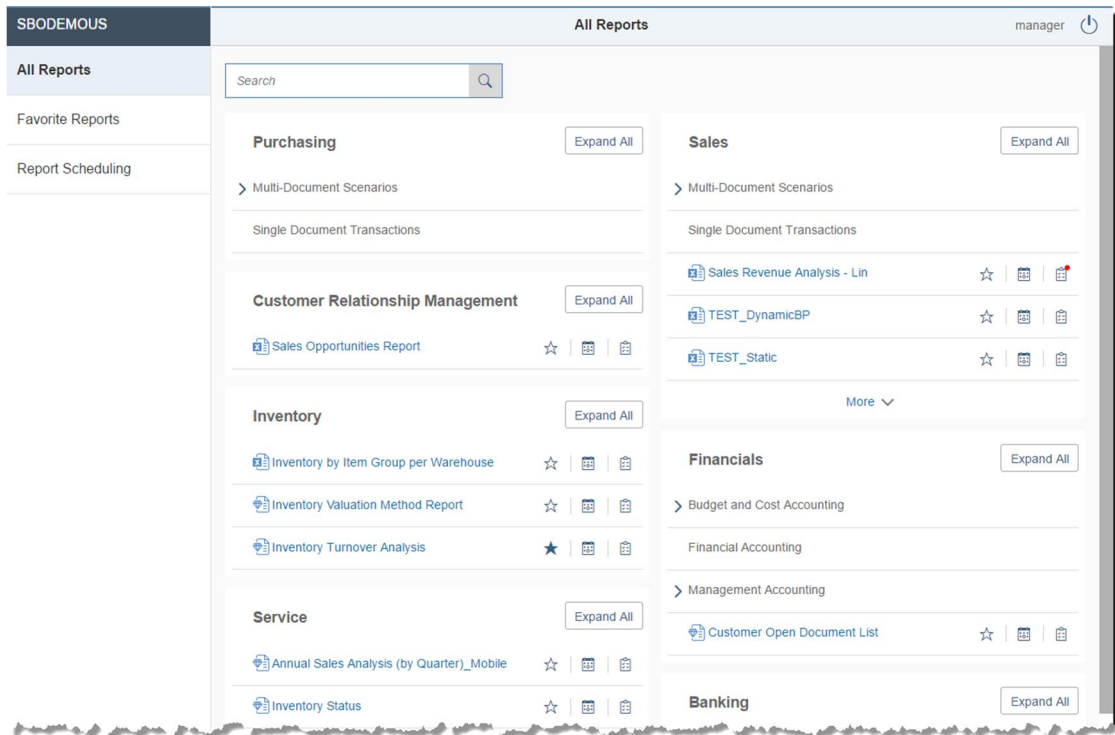
i Note

If a Crystal report and an Excel report have the same name, they can be distinguished by the icon before the file name.

i Note

If an Excel report has been saved directly under *Excel Report and Interactive Analysis*, parallel to all the first level categories, it cannot be displayed in the Analytical Portal.

5.2   Setting a Report as Favorite

If you want to find a report more easily, you can save them as favorite reports and then locate them in the *Favorite Reports* tab.

i Note

Only when there are reports marked as favorite, will the *Favorite Reports* tab be enabled. Otherwise it is grayed out.

Choose ☆ by the side of a report to mark it as your favorite, so that the report will show in the favorite report page. If you want to move a report out of the favorite reports, choose ★.

In the *Favorite Reports* tab, all the reports are displayed without hierarchy under each category.

5.3   Manually Running a Report

When you want to run a report, locate it in the *All Reports* tab or the *Favorite Reports* tab, and enter the report running page by clicking the report name.

In the report running page, for reports that contain parameters, you need to first make sure all parameters are configured. If there is a default parameter value for a parameter (*Off* for *Boolean*, for example), the default one will be displayed. You can change the parameter values at your need.

After parameter configuration, choose the *Run* button, and the report result will be displayed below.

If you click the *Run* button, report will run again with the same parameter values.

i Note

After you choose the *Run* button, the displayed parameters (if any) will be automatically hidden. If you want to reconfigure the parameters, choose the *Show Parameters* button.

5.4   Sharing a Report Result

With the report result displayed, you have two options to operate on the result:

· Send the report result by email

- Download the report result to local
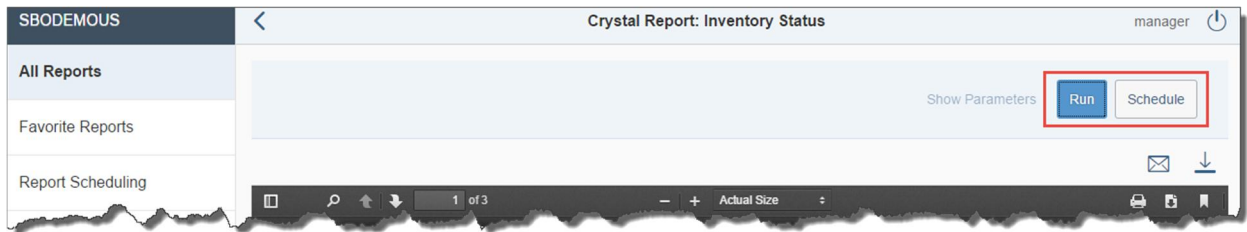
5.4.1   Sending a Report Result by Email

ℹ **Note**

Make sure you have configured the email settings described in Email Settings.

In the report result page, after running the report, you can see two buttons displayed above the result. To share the result by email, proceed as follows:

3. Choose ✉ to open the *Send Result by Email* window.
4. Fill in *Email-To* and *Cc* with a correct email address. The drop-down list offers you a list of contacts (users in your company) from which you can choose.
5. Choose the format of the result you want to send.

   Supported formats for Excel report results include:

   o   Excel
   o   PDF
   o   HTML

The supported format for Crystal report results is PDF.

6. Fill in the subject (the default subject is the report name) and comments, and then choose *Send*.

ℹ **Note**

As report files might contain sensitive business data, you are advised to double check the correctness of the recipient's address.

5.4.2   Downloading a Report

In the report result running page, after running, choose ⬇ to download a report result.

For Excel reports, you can choose one from the three formats mentioned above. For Crystal reports, the downloading process will be directly triggered and the result format is PDF.

6 Scheduling a Report

Setting up a schedule for the system to automatically run a report daily, weekly, or monthly, and the running results can be sent to a user in your company or a recipient outside your company via email.

> **i Note**
>
> Report schedules and report running history of the corresponding schedules can be viewed and edited only on the user level.

6.1 Creating a Schedule

There are two ways to go to the schedule creation page:

- Choose 🗓 beside a report name in the *All Reports* tab or the *Favorite Reports* tab.
- Choose the *Schedule* button in the report running page.

Then you are in the report schedule creation page. There are four groups of configuration for setting up a report schedule:
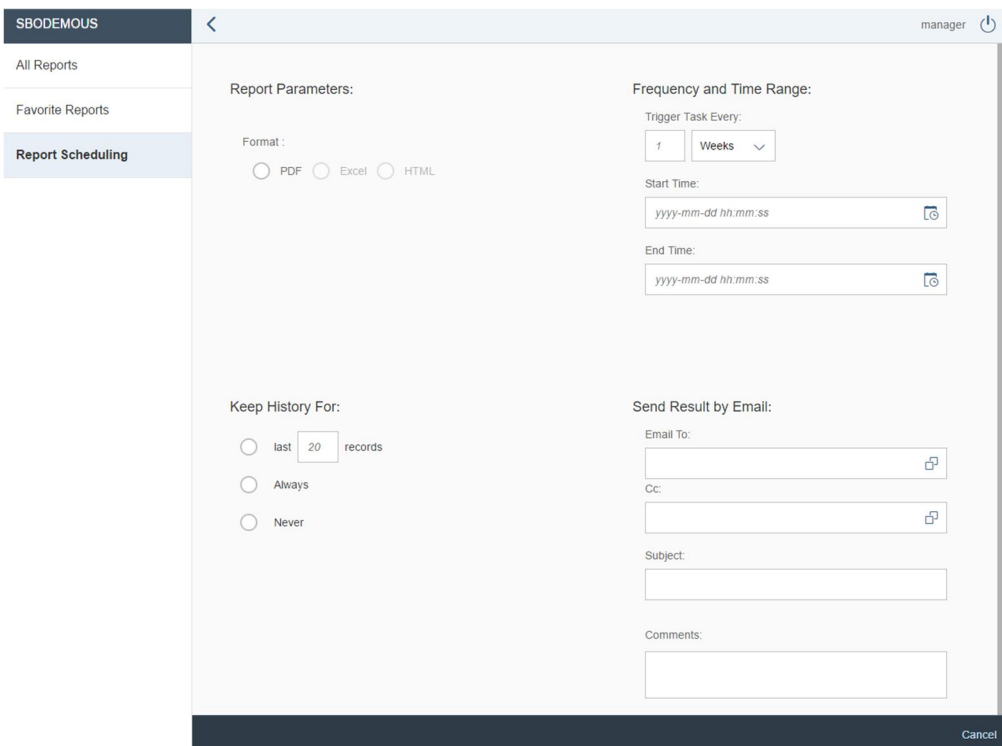
- *Report Parameters*

    Set up report parameter values if there are parameters in this report.

    Decide the format you want to the report running result to be sent by email.

- *Frequency and Time Range*

  Define the frequency that you want the report to be run and its result to be sent, and also effective time range for this schedule.
- *Keep History For*

  Set up how many records you want to keep in the system.
- *Send Result by Email*

  Configure information to send a report running result by email automatically. This is optional.

  > **i** Note
  >
  > Make sure you have configured the email settings described in Email Settings.

After filling in all the information above, choose *Save*. Name the scheduled task, and then you can find it the *Report Scheduling* tab page.

> **i** Note
>
> One report can have multiple schedule tasks, but the names of these tasks cannot be identical to each other.

6.2   Viewing All the Schedules

In the *Report Scheduling* tab, you can find all the ongoing report scheduled tasks you have created.

All the scheduled tasks are listed in chronological order. You can search for a task by the scheduled task name, or by its report name.

If you want to filter out certain tasks, choose the filter icon. You can filter the tasks by *Scheduled Task*, *Report Name*, *Category*, or *Type*.

After selecting the filter conditions, choose *OK*. The filter information will be displayed above the task list as below.

If you want to remove the selected filters, choose the *Remove Filter* button.

In the *Report Scheduling* page, you can delete a scheduled task, but the running history will not be automatically removed.

Report Scheduling					manager
No filters selected					
Scheduled Task	Report Name	Category	Type	Creation Time	Action
Weekly Sales Performance	Sales Performance by Custo...	Sales	Excel	2017-07-07 17:54:12	
Monthly Sales Performance	Sales Performance by Custo...	Sales	Excel	2017-07-07 17:51:34	
Weekly Customer Open Doc...	Customer Open Document L...	Financials	Crystal	2017-07-07 17:50:52	
Monthly Customer Open Do...	Customer Open Document L...	Financials	Crystal	2017-07-07 17:50:21	

6.3   Updating a Schedule

To update the configuration of a scheduled task, go to the *Report Scheduling* tab, choose the task name, and you are in the update page. Fill in the desired information, and then choose *Update*.

7 Viewing Report Running History
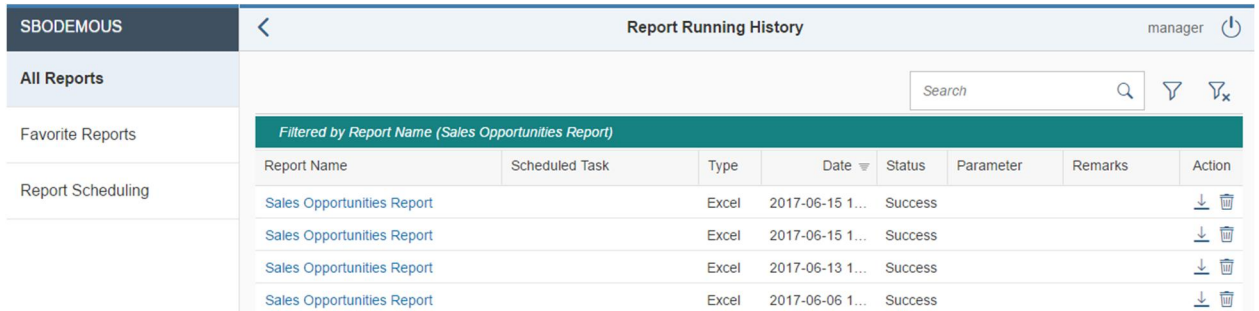
All the manual and automatic report running records (if you have set up to keep the records for scheduled tasks) can be found in the *Report Running History* page.

You have two ways to navigate to the *Report Running History* page:

- In the *All Reports* tab or *Favorite Reports* tab, choose 🖹 beside a report name. The running history of this specific report will be displayed.
- In the *Report Scheduling* page, choose 🖹 beside a scheduled task name. The running history of this scheduled task will be displayed.
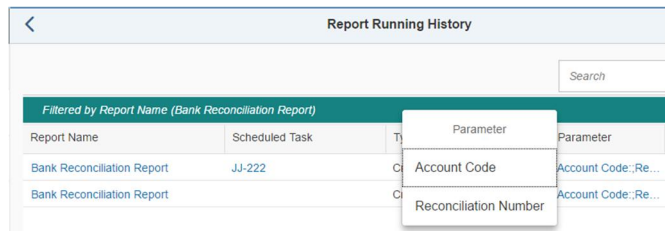
In any of the two cases, if you want to view the running history of another report or another scheduled task, choose the *Filter* button to set up filter conditions you want. If you remove all the filters, then the report running history of all the reports will be displayed.

In each history record, the following information can be found:

- Report name
- Scheduled task name (if applicable)
- Report type
- Time of running the report
- Parameters (if applicable; choose the parameter to view the complete list as below.)

- Run status (there are three statuses: running, success, and failed.)
- Remarks (for example: errors, warnings, etc.)

You can download the report result in each running record, or delete a running history record.

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