SAP BusinessObjects Set Analysis User Guide

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Set Analysis

In BusinessObjects Set Analysis you work sets and export lists.

Sets
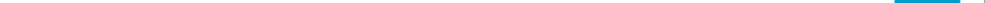
Sets allow you to define complex selections and custom groupings of customers, products or other individual items in a database.

Sets allow you to identify and target groups of clients based on criteria that source data allow you to specify. For instance, you may want to select all clients living in a particular geographic area who own homes, are below a certain age, and have children.

Sets have the following attributes:

- Sets contain items based on a single subject that determines the primary key.
- Sets are uniquely identified by name, folder and author.
- Sets can have a description.
- Sets have a last modified date.
- Sets are allocated to a folder.
- Sets contain a count of the members if the set has been built. Otherwise it just has a definition.
- Sets contain members that can accumulate a score based on the weightings you define.
- Sets can be processed from many steps, each step based on a single table or view.

The subject defines the central theme for the sets which are based on it. A set can contain data for only one subject; for example, customers, accounts and products. In the context of a customer subject, you can define sets that include conditions based on the various tables and views that describe the customer entity.

Customers can be classified, analyzed and treated in different ways using set techniques. You can create broad or specific sets to categorize customers in ways that are relevant. The following is an example of the link between subject area, sets and subsets:

Levels	Example
Subject Area	Customer
Set Group	Single Set
Set	Collector
Subject	Member, Joiners, Leavers

Individual Sets and Set Groups reside in a Set Analyzer repository. Individual Sets can belong to Set Groups, and Set Groups generally contain more than one individual set. Grouping sets can be a useful way of classifying and organizing sets into meaningful categories to facilitate analysis.

Sets can be scheduled. Refer to the Dashboard Builder documentation for more details.

When are sets useful?

Sets help you understand how groups and segments contribute to overall performance by simplifying and accelerating the data segmentation process. Sets can help you address the following types of business questions:

- turnover
- cross-selling
- customer scoring (ranking)
- data sampling
- segment interaction
- list management
- marketing stratification

Viewing sets in Set Analysis

You can perform the following functions from the **Sets** tab of Set Analysis:

- View the list of existing sets
- Delete a set
- Name and describe sets
- Define the current set
- Create a set
- Create a folder
- Define set scope
- Access and create Groups
- Create taxonomic groups and rebuild (processing) groups

Creating a set folder in Set Analysis

A folder contains sets and groups. Folders enable you to manage your sets effectively.

Note:
You cannot delete a folder if it contains sets. To delete a folder, you must first delete the sets it contains.

1. In **Set Analysis** > **Sets**, click **Add**.
2. Select **New Folder.**
3. Enter the following information:
   - Name
   - Description
   - Folder audience (indicates which user groups can access the folder and the sets it contains)
4. Click **Apply**.

The new folder is displayed in the list of available sets, folders and groups.

Creating a group in Set Analysis

1. In **Set Analysis** > **Sets**, click **Add**.
2. Select **New Group.**
3. Designate the following attributes for the group:
   - name
   - the folder to which the group belongs
   - type: distinct, taxonomic or rebuild
4. Click **Apply**.

The new group appears in the list of available sets, folders and groups.

Related Topics
• *Set group types*

Set group types

The set group types are:

- Distinct
- Rebuild
- Taxonomic

Distinct groups in Set Analysis

Distinct Groups allow you to group sets and ensure that there is no overlap between them. Set Analysis creates a list of members that removes any duplication. If you create several mailing campaigns, you want to ensure that no contact is mailed more than once. The distinct model allows you to define a priority for each set and ensure that each member is allocated to only one set.

Once the sets have been added to the group it is ready for processing. The group is processed on creation, after one of the following events:

- a set is added to or subtracted from the group
- the build order is changed
- the display order is changed
- one of the sets within the group is refreshed. In this case, the group is refreshed automatically.

  Note:
  Refreshing a set that is part of a distinct model can be a lengthy process, because the group is refreshed as a part of the refresh process. The system displays a warning dialogue box before the group is reprocessed.

Selecting a distinct group in Set Analysis

1. In **Set Analysis** > **Sets** do one of the following:
   - Click **Add** > **New Group** to create a group . Select the new group and click **Edit**.
   - Select a group and click **Edit**.
2. Add sets to the group.
3. Optionally, reorder the sets according to:

- Build Order: changes the order in which the sets are built. The order in which sets are listed as component items for a group determines the priority order for the calculation of distinct items. The group is made up of all the items from the first set, plus the items from subsequent sets not already been allocated to the group. The first set has the highest priority.
- Display Order: changes the display order for the sets.

Rebuild groups in Set Analysis

This is a group of sets with or without similar content that can be refreshed at a defined time interval. At refresh time, the dependencies are taken into account.

A rebuild group can be scheduled and all sets under it are taken into account. For example, if set A is dependent on Set B before it is refreshed, rebuild type group takes care of that.

Rebuild groups allow you to group sets to be processed and reprocessed together. For example, if you have processed a final set which has been processed from several other sets, you need to reprocess all the other sets first, and ensure that each dependent set has finished processing, before reprocessing the final set.

This can be a lengthy task. Building a processing group allows you to group all the sets together and let Set Analysis decide which sets to process in which order.

Note:
If any sets within the group are rebuilt manually, outside of the context of the group, the system reprocesses the whole group.

Building a rebuild group

1. In **Set Analysis** > **Sets** do one of the following:
   - Click **Add** > **New Group** to create a group . Select the new group and click **Edit**.
   - Select a group and click **Edit**.
2. On the Add Set page, add and remove sets.
3. Click **OK**.

Note:

Child sets are automatically added to the group to which their parent sets are assigned. Parent sets are placed above their child sets in the processing order.

4. Click **Process Group** to process the group.

Taxonomic groups in Set Analysis

This is also a group of set for classification and analysis purpose. Taxonomic groups cannot be scheduled but can be used as a way of classifying sets in all places where sets can be selected in a tree list. These groups are also used in group benchmark analytic. For example, if you want to group all sets related to high income spenders then you can define the group as taxonomic and add the relevant sets to the group.

Creating a set in Set Analysis

Creating a set involves two steps:

- Defining a set
- Building a set

Defining a set

1. In **Set Analysis** > **Sets**, click **Add**.
2. Select **New Set**.
3. Enter the name of the new set.

   Each set must have a name that identifies it for later operations. The name must be unique in the folder. If you want to use the same name for two sets, you must allocate them to different folders.

4. Select a folder.
5. Select a build strategy for the set:
   - **System default**
   - **Stepwise only**
   - **Combination (where possible)**

6. Select the **Scope** of the set.

   Public sets are visible to all users and private sets are available only to the person who created them. When you create a set and allocate it to a public folder, the scope is defined as public. When you create a set and allocate it to a private folder, the scope is defined as private.

7. Add any descriptive notes about the set, and assign one of the following descriptions if appropriate:

   • **Frozen**

     If you select **Frozen**, neither the set owner nor any other user can change or reprocess the set. To change or reprocess the set in the future, deactivate this field. This flag is useful when creating a snapshot set that must not be reprocessed, for example, a specific mailing campaign.

   • **External**

     Selecting **External** indicates that the set was created by an external action. Use the option if set membership is calculated and managed by some other application. The other application can create a set and store it within the repository.

   • **Terminal**

     Select **Terminal** so that the set is not used as the starting point for any other set.

     Note:
     You cannot use a terminal set within the Visual sets view.

8. Specify whether the set is **Dynamic** or **Static**:

   • Static sets are snapshots that store data of a given moment. Static sets are built once, and their membership does not change over time.
   • Choose **Dynamic** from the list to attach a calendar type to the set. Dynamic sets permit the membership to change based on changes in the source data. Dynamic sets are generated between two dates, based on a specific period of time. The history of dynamic set membership can also be preserved and used for time-based analysis.

9. If you are creating a Dynamic set, enter the following details:

   • the time interval for set rebuild
   • the type of dynamic set: **Temporal**, **Limited Temporal**, or **Snapshot**
   • rebuild information

Dynamic sets are typically rebuilt according to the periods associated with refresh time interval or calendar selected for the set. The default is to prevent multiple processing in the current period as you may not normally want to rebuild the set twice in the same period.

- **Allow Auto-fill**

  For new sets, the period associated with the first build is called the base period. For subsequent builds, the most recently ended period is associated with the set. However, if you activate **Allow Auto-fill**, the associated period comes after the period for the most recent build. Thereafter, each build increments the active period for that set. If the set is dynamic and **Allow Auto-fill** is activated, the **AutoFill / Rollback** button in Sets view is enabled.

  Selecting **Stop at current period** causes normal behavior to be adopted once the auto increment rebuild period is equal to the current period.

10. Click **Apply Changes** to save the new set. Once you have created the set definition, you must add data to it.

Related Topics
- *AutoFill in Set Analysis*
- *Building a set*

AutoFill in Set Analysis

The **Allow Auto-fill** option in the set **Attributes** panel is used to process a set from a selected base date contained in predefined calendar to a specific end date, or for n periods from the base date. AutoFill is enabled only if the set is dynamic and if you activate **Allow Auto-fill** in the set's attributes properties. AutoFill can back-fill the dynamic membership of a set.

For new sets, the period associated with the first build is called the base period. For subsequent builds, the most recently ended period is associated with the set. However, if you check Allow AutoFill, the associated period comes after the period for the most recent build. Thereafter, each build increments the active period for that set. If the set is dynamic and **Allow Auto-fill** is activated, the **AutoFill / Rollback** option appears on the set **Content** panel.

Once the AutoFill parameters have been defined, the set can be processed.

Note:

- AutoFill can only be used for dynamic sets.
- The dates you can choose to AutoFill to are determined by the selected base date and whether the **Stop at Current Period** option is activated in the set's properties. AutoFill Summary This provides summary data such as start and end periods and total number of periods.

Building a set

Once you have defined a set, select it in the list of available sets. You can now add data by building the set. Building the set involves:

- adding data
- building the set with the data

Related Topics
- *Visual data views in Set Analysis*
- *Visual sets in Set Analysis*
- *Using Freehand SQL*
- *Defining an event analysis in Set Analysis*
- *Importing keys into sets from a csv file*

Visual data views in Set Analysis

A new set is created empty. An empty set needs to have members added to it before it can be used. You can fill the set in the Visual Data view. You can perform the following functions from the Visual Data view:

- Navigate through the database using the list of universe objects to locate the categories of data required to fill the current set.
- Create your own object lists for data navigation.
- View the contents of the database categories in the detail windows on the right of the view. These detail windows provide information about the content of the categories and how they relate to other categories.
- View the components of a category by moving it to the top detail window. When you move a category to the top window, its sub-categories appear

in the lower window. Move a category to the upper window by
double-clicking it in the lower window.

- View the relationship between the upper and lower window categories
  as indicated in the list of objects.
- View the number of members currently in the set.

Using a Visual Data view

1. In the **Set Building Steps** pane of the **Content** tab click **Add**.
2. Select **Visual Data**.

Creating a visual data view

Once you have created and saved a set, you can add members to it in the
Visual Data view. The Visual Data view contains a hierarchy of segments
for members on which you can drill down.

1. Click **Add** under **Set Building Steps** and select **Visual Data**.

   Once you have created and saved a set, you can add the data field to it.
   When you select the Visual Data option, a list of object is displayed in the
   left-hand pane. The list of objects displays dimensions and measures
   available in the database for creating set content.

2. Select **Visual Data**.
3. Select and add a dimension or measure.

   Note:
   Select a count for each dimension. This step is required before performing
   an operation on your set.

4. To remove the dimension or measure, click the left-facing arrow key.

   When you select a measure, the **Added Field Condition** window opens.
   If you select a dimension, you must check **Yes/No Condition** and click
   OK for the window to appear.

   The **Added Field Condition** window allows you to define the filter and
   specific condition for the dimension. For example, use the field condition
   to create a set of people with Age (dimension) that is greater than 45
   (filter, condition).

   Defining a condition is optional. If you do not want to define a condition,
   check **Yes/No Condition** to deactivate all filters and view all values for
   the selected dimension.

If the dimension is Date type, then the field condition window allows you to enter calendar details.

5. Select **Relative** or **Floating** date:
   • Select floating to specify the floating period.
   • Select relative to enter a specific date.
6. If you selected dates with a **Between** condition, select an end period which can be either relative or floating.
7. Select a filter option. The description is automatically displayed.
8. Click **OK**.
9. The filter condition is displayed on the selected dimension on the main page.
10. Select estimates only or exact count.
11. To filter a dimension with a numeric value, select the dimension in the set building area of the page. The filter function button appears.
12. Click the filter function button, and enter all details for the set content.
13. Click **Next.**
14. Enter a description of the step to be processed, for reference purposes.
15. Allocate points for scorecarding using the **+** or **-** buttons, or by typing an integer value in the **Additional Score** box.

    You can allocate a score to each step or process operation. For example, select Tennis Players and award 1 point. Select Contacts in New York, and award a score of 2, and select Contacts spending more than $200 and award a score of 4. Each member can exist only once in a set, but if a member is selected for more than one reason, then the scores are accumulated on a member-by-member basis. In this example, someone who matches on all three conditions accumulates a score of 7.

    The score must be an integer and can be positive or negative. Limits for number size vary by database and installation. Typically, the score value is not very large.

16. Optionally, define sampling parameters.

Related Topics
• *Sampling in Set Analysis*

Sampling in Set Analysis

Sampling allows you to refine a set selection by defining the exact characteristics of the output. Selection focuses on defining the criteria that defines the output. Normal selection, however, can produce too many members.

If you select a set of customers of a certain age, gender, and income from a database containing 3,000,000 customers, you may produce a set of 270,320 customers. If you want to target only 10,000 people, you can split them into five cells of 2,000 people to test different treatments and use the sampling module to create random sampling and ranked attributes.

You can stratify each selection into groups to produce skewed samples. For example, base the data on a 60/40 male/female split and then use skewed samples to target 25% male and 75% female.

Set Analysis provides four specific types of sampling scenario:

- **Random sample** creates a different result set each time it is created. For example, use it to select 100 people randomly from the sample frame. If you select **Random**, activate either **Sample Size** to show the numbers used to process the sample, or **Sample % of Total** to count the sample as a percentage of the total.
- **Ranked** takes the top n number of customers from the sample. For example, use it to select the top 100 people from the sample frame. Sort on the columns matching the field to be used for the ranking, then click **OK**. You can sort the column in either ascending or descending order to specify whether you choose the top n or bottom n. Descending order produces the top n.
- **Stratified Random** sampling randomly selects customers from the sample frame. For example, use it to select randomly 50 males and 50 females from the set.
- **Stratified Ranked** sampling selects a ranked selection in each category. You can use this sampling to list the top ten people in each town in the sample frame.

Defining a sample grouping or strata

1. Click **List available objects**.
2. Select the objects by which you want to group the resulting sample.
3. Click **OK**.

   The resulting table includes the following columns:

- • the data corresponding to the objects you selected for the Group Fields option
- • Source Count: the breakdown of the original source, grouped by the objects you selected
- • Source %: grouped source count as a percentage of the total
- • Sample Count: the numbers used to process the sample
- • Sample % of Source: the sample count as a percentage of the source count
- • Sample % of Total: count as a percentage of the sample total

4. To change the Sample Count, click the value in the table and enter a new value. Changing the values of the counts is useful when a sample is irrelevant to the result.

5. If you selected a Ranked sample, select the ranking by clicking the button next to the Ranked by field.

6. Sort on the columns matching the field use for the ranking, then select **OK**. You can sort the column in either ascending or descending order to specify whether you choose the top n or bottom n. Descending order produces the top n.

7. Click **OK**.

   The set built is displayed.

Visual data estimates in Set Analysis

Visual Data estimates allow Set Analysis to use estimates rather than getting counts from source tables. Estimates are not as accurate as counts but can be much quicker.

Visual Data estimates use aggregated objects to calculate subsequent counts for objects at a lower level of an ad-hoc object tree.

Estimates on the aggregated objects differ from standard object trees because you do not need to define them using the Object Tree creator in Set Architect. The counts for the tree are predefined but are not calculated if you add an object to the predefined tree.

Note:
The accuracy on calculations for estimates improves if the object being calculated follows a predefined Object Tree. For example, if a geography hierarchy with fast counts has been defined as Country, State, City and the

Gender object is added to the bottom of the hierarchy, the estimate is more accurate than for an ad-hoc assortment of objects.

Example: An ad-hoc object tree of Country, Bank and Gender all of which have had Fast Counts calculated on an individual basis.

The country, bank and gender objects are not part of the Object Tree.

If England and Bank 1 are selected for the first two levels of the tree, when Gender is expanded, the system finds a fast count for Gender and the objects above it. A smart calculation is used to produce an estimate for Gender. The estimates returned are:

Female= 4,356,808; Male = 4,218,497; Unknown = 69,156.

If the source table is queried to obtained exact counts, the result is:

Female= 4,456,448; Male = 4,128,768; Unknown = 65,536

Setting visual data estimate options

To access visual data estimate options, open the Visual Data view for edit and click **Options** in the top right corner of the screen to change this option.

The following options affect the way in which estimates work:

Option	Description
Always use Source if required	Select the option to query the source table without prompting the user.
Always use Estimates if available	Select the option to use estimates without prompting the user.

Visual sets in Set Analysis

Once you have created a set, you can add or remove members to or from it using the database navigation facilities of the Visual Data view. You can

also add or remove members to and from a current set from a previously created set. You can perform the following functions from the Visual sets:

- construct sets that contain members that several sets have in common
- perform set mathematics on any combination of sets
- manage complex exclusions based on existing sets
- perform visual sets counts

The Collections list shows you the sets that have been selected for inclusion in the Visual sets operation. You can combine sets for inclusion in the universe by dropping them in the same collection. By dropping sets in separate collections, they are displayed individually in the graphical universe area. The color of each collection matches the color of the set in the universe.

Modifying visual sets

1. You add a set to a collection by selecting the set and clicking the arrow keys to move it to a particular collection.
2. Optionally, click a collection to rename it.
3. To select the collections you can either click the diagram or click **Select**.
4. The Count calculates the number of members (and percentage) currently selected from the available sets in the universe. Click **Next** to select the operation you want to perform on the sets
5. Enter the Description for the Visual Set.
6. Select the Set Operation to be performed. The operations are:
   - Add: adds the selected members in the sets in the universe to the current set
   - Subtract: subtracts the selected members in the sets in the universe from the current set
   - Keep: keeps the intersection of the current set and the selected member in the sets in the universe
   - Score: updates the scores for the selected members in the sets in the universe

   Note:
   The first time you create a set, the default choice in the set operation is added automatically.

7. Optionally, enter a score in the Additional Score field.

   With SQL tools and selection tools in general, all matching items are returned as equal. This is not always the case in marketing, for example,

so you can score each selection. The scores for each selection are then accumulated.

8. Click **OK** to execute the operation.

The set is added to the set list, and a graphical diagram of the operation performed is displayed in the Step Detail pane.

Using Freehand SQL

Freehand SQL allows you to write SQL to process sets. For example, you can create a link to a fact table or include information necessary to create the set that is not in the dimension table.

Note:
Use the normal set operations (Start, Add, Subtract) to determine how the results of the free hand SQL are applied to the current set. The SQL statement can return as many columns as necessary, but one column must be named ID. This column is used as the list of IDs with which to create the set. It is not possible to create a set containing IDs that are not listed in the dimension table. When you process a set from freehand SQL, any IDs that are not in the dimension table are discarded.

1. In the Set Analysis Sets view, select an existing set or create a set.
2. Click **Add**, and select **Free Hand SQL**.
3. Type in the SQL to generate a list of keys to form the set.
4. Click **Next**.
5. Enter the description of the SQL process and define any additional points.
6. Click **OK** to process the SQL.

Defining an event analysis in Set Analysis

Event Analysis analyzes the membership of a dynamic set (joiners, leavers, stayers and visitors), specifies analysis periods and uses the activity within the set for analysis. Select defined parameters to specify the event type to analyze.

1. Click **Add** in the Set Building Steps.
2. On the Event Analysis page, select the folder and the set under it. Click the arrow to select the folder.

3. Choose one of the following:

Option	Description
Activity	Select **Activity** to create an action based on activity within the analysis period.
Summary	Select **Summary** to create an action based on the summary of activity within the analysis period.

4. Specify the analysis period.

You can simply specify start and end dates, or you can use the calendar associated with the set to specify the analysis period.

Note:
You cannot proceed until you define the Analysis Period.

The event activity depends upon whether you have selected the Activity or Summary button.

5. Click **Activity**, and choose an Activity type to analyze.

Activity Type	Description
Joiner	Analyzes the selected set for people who joined the set in the analysis period.
Leavers	Analyzes the selected set for people who left the set in the analysis period.
Stayers	Analyzes the selected set for people always present within the set in the analysis period.
Visitors	Analyzes the selected set for people at one time or another in the set in the analysis period.

6. Click **Summary**, and construct a summary action for the analysis.
   • Cycle allows you to select members based on their type of presence with respect to the calendar periods.
   • Condition allows you to set a condition for inclusion.
   • Number allows you to set the number of periods over which to perform the selection.

• Time Interval allows you to select the time periods to use.

7. Click **Next**.
8. Define the Description and Set Operation for the event.
9. Click **OK**.

Importing keys into sets from a csv file

The Import option allows you to import lists of keys from a .csv file. The file must contain a column based on the key. Before you can import keys, they must exist in the primary source table of the current subject.

The import process imports keys that exist in the dimension table for the current subject. If a customer file contains 100 items and only 99 of the customer primary keys exist in the customer table, then 99 items are inserted in the set.

1. In the Set Analysis Sets view, select the set into which you want to import keys.

   The Import view appears.

2. Click **Select Import File**.
3. From the Open dialog box, select the file from which you want to import keys.

If you are not sure of the file format required to import into Set Analysis

1. In Set Analysis create a set with a small number of items.
2. Choose **Export** from the File menu.

   Note:
   Do not change the default options for delimiters.

3. Create a set and import from the same file.
4. Confirm that you have imported the items into the set.
5. Open the comma separated .csv file.

   Notice how the first row contains a column name. This is required for the import to work successfully.

Set-building options in Set Analysis

This section describes set-building actions such as:

- AutoFill
- Build
- Checking for dependencies

Related Topics

• *Dependencies in Set Analysis sets*

Building sets in Set Analysis

The Build option in the set **Content** panel allows you to build the sets that you define. It calculates based on the steps defined.

As you build the steps, the sets displaying -1 can be seen. The -1 signifies that the step has been combined with other steps to form a single SQL statement, which improves the set processing.

Note:
Only one SQL block can be used per set, all Visual Data and Visual Set steps can be combined into a block, all other steps cause individual statements to be run, sampling within a step also causes the block to be broken.

Completing the set build in Set Analysis

Click **Finish** to build individual steps.

This builds the last step defined and keeps the counts from previous steps intact. This method provides a slight improvement in processing time.

AutoFill in Set Analysis

The **Allow Auto-fill** option in the set **Attributes** panel is used to process a set from a selected base date contained in predefined calendar to a specific end date, or for n periods from the base date. AutoFill is enabled only if the

set is dynamic and if you activate **Allow Auto-fill** in the set's attributes properties. AutoFill can back-fill the dynamic membership of a set.

For new sets, the period associated with the first build is called the base period. For subsequent builds, the most recently ended period is associated with the set. However, if you check Allow AutoFill, the associated period comes after the period for the most recent build. Thereafter, each build increments the active period for that set. If the set is dynamic and **Allow Auto-fill** is activated, the **AutoFill / Rollback** option appears on the set **Content** panel.

Once the AutoFill parameters have been defined, the set can be processed.

Note:

- AutoFill can only be used for dynamic sets.
- The dates you can choose to AutoFill to are determined by the selected base date and whether the **Stop at Current Period** option is activated in the set's properties. AutoFill Summary This provides summary data such as start and end periods and total number of periods.

Emptying a set in Set Analysis

In the set **Content** panel, click **Empty** to empty the defined sets to be built again.

Removing a set

1. In Set Analysis, **Sets**, select a set from a folder.
2. Click **Remove**.
3. Click **OK**.

   The selected set is deleted from the folder.

Dependencies in Set Analysis sets

In Set Analysis, to check whether the set has any dependent sets, click **Dependencies** in the set **Content** panel.

The **Dependencies** panel appears, showing a list of all sets that are dependent on the current set. This shows you whether changes to the current set have any effect on any other sets.

Editing a set in Set Analysis

1. In **Set Analysis** > **Sets** > **Content**, select the set universe.
2. Select a set.
3. Click **Edit**.
4. In the **Content** panel modify as necessary:
   - To add an item selecting it in the left-hand list and click **>**.
   - To remove an item from the list, select it and click **<**.

     When you select an item the fast counts panel appears. Click **Cancel** so that you can remove it from the list.

   - To edit the fast counts properties for an item, select it in the selected sets list.

     The fast counts properties panel appears.

   - Activate or deactivate **Yes/No Condition**.
   - Select or deselect set members.

   Click **Next** or **Attributes**.

5. In the **Attributes** panel modify as necessary:
   - the set description
   - the additional score
   - the sampling type

6. Do one of the following:
   - Click **OK** to save your modifications.
   - Click **Previous** or **Content** to return to the **Content** panel.
   - Click **Cancel** to cancel the modifications made in the edit mode and return to the Sets panel.

Related Topics
- *Configuring the Visual Data Counts analytic*
- *Creating a visual data view*
- *Creating a visual data view*
- *Sampling in Set Analysis*

Set membership in Set Analysis

The **Membership** panel displays members for the selected set. It shows the status of stayers, joiners and leavers.

To view the membership of a set, go to **Set Analysis** > **Sets** > **Membership**.

Export lists

There are three major actions that you can take once you have gone through your analysis.

- Rules: automate some of the analysis or to track exception when data changes
- Lists: generate lists of people according to criteria.
- Schedule: schedule refresh of metrics and rules

Related Topics

• *Set Analysis List feature*

• *Defining a set list in Set Analysis*

Set Analysis List feature

The List feature enables the user to get a subset of individuals and products from a given set. A list is a powerful way to get a clear picture of your analysis. For example, a list of people in high profile subset or list of joiners in the Collectors set.

A list is defined by the administrator through the System Configuration section but once you access the list, you can customize it to your needs. For example, a list of joiners may have their customer id, age marital status and income, which is termed as the content of the list.

There are different ways of sending a list, for example, emails, URL, to allow better integration with operational systems like Campaign Management.

A list can be based on single or two sets. For example, you can get a list of leavers in High Spender set to Low Spender set.

A list can be linked to Individual Profiler. The Profiler Output enables you to profile an individual of the list. Therefore based on your List template, the Individual analytics generates the names corresponding to the content of the list which further allows you to get into deeper analysis for each individual.

Defining a set list in Set Analysis

As the list is generated it is displayed on the screen. This list can also be stored on the server as a Web Intelligence document, downloaded and saved

on the local hard drive, linked or published as a URL or sent through an email.

You can also generate a metadata XML that was defined during the **Dashboard and Analytics** setup.

1. Click **Export List**.

2. On the List Generation page select an output from the List.

   Output is the type of file the information is saved to, and is defined by the administrator in the **Dashboard and Analytics** configuration. Refer to the Dashboard and Analytics Setup documentation for details.

3. If you select exporting to a URL, enter the URL string.

   Note:
   The administrator can set a default subject name or selected objects list, which the user cannot change. Only the administrator sets the email addresses.

4. Select the List Composition.

   Use the setting to indicate whether you want to see a list of one set or a migration which is a movement from one set to another or measures for two sets.

5. Click **Next** to define the Set for the List.

6. Based on the List Composition, the set lists are displayed. The set list is based on the combination of subject area and list composition selected in the previous section. You can view the set list either by group or set.

   If you selected single set as the list composition then you have one set list displayed.

   If you selected migration as the list composition, two set lists appear. These set lists are source and destination sets, and indicate the movement from the source set to the destination set.

   If you select any other list composition, two set lists are displayed for comparison.

7. Click **Next** to define the content of the list.

8. A list of available information is displayed. Select as many and move it to the List content column by clicking the right arrow key. You can move only one content head at a time.

Once you have moved the content heads, you can move them in the order you want them to appear in the list.

To remove any content heading, click the left arrow key.

9. Click **Next** to define the filters.
10. Select at least one filter which is a subset for the list. Use the arrow keys to move the filter name to the Conditions applied column.
11. Optionally, choose size and ranking of the list.

    You can have only the first twenty rows to see only information about twenty customers each time you generate the list. You can also sort the list by the content defined. Select ascending or descending from the **Order By** drop-down list.
12. Click **Generate** to generate the list.

    Note:
    The list can take a while to generate as the system reads the entire database based on the list specifications.

Set analytics

Configuring a Membership, Migration or Multi-set Same Time Events analytic

The Membership, Migration and Multi-set Same Time Events analytics in Set Analysis study trends in set metrics, however they study different facets of these trends. The configuration of these analytics is similar in many ways, with the following differences:

- The Membership analytic works with a set that contains all members in one or more sets.
- The Migration analytic works with one or more sets that show information on cross set migrants, for example, joiners.
- The Multi-set Same Time Events analytic works with one or more sets that track the multiple activities of joiners, leavers, and stayers.

1. In the analytic edit panel, select sets to list in this analytic.

2. In the "Navigation Options" section, to put a hyperlink on the set name to an analytic on the Central Mangement Server, activate **Use set name as hyperlink to go to** and click **Browse** to navigate to the analytic.

   The hyperlink text window is populated with the hyperlink text in an openAnalytic text string. You can edit this text string. For information on openAnalytic, see the *Linking from goal, universe query and metric-based analytics* section in the documentation.

3. To hide the trend chart, activate **Do not display an automatic trend when clicking on a chart component**.

   When this option is deactivated, you can select an item in the chart list, and its metric trend chart appears. This option is useful if you want more space in the list for columns.

4. To set a hyperlink on data points to an analytic on the Central Mangement Server, expand the "DataPoint Navigation options" section, and activate **Use data point as hyperlink to go to** and click **Browse** to navigate to the analytic.

   The hyperlink text window is populated with the hyperlink text in an openAnalytic text string. You can edit this text string. For information on openAnalytic, see the *Linking from goal, universe query and metric-based analytics* section in the documentation.

5. In the "Display Mode" section, select a mode.

6. In the "Time Window" section, select a window from the drop-down list.

Choosing a set metric for the Metrics Overview, Membership, Migration or Multi-Set Same Time Events analytic

Note:

If you are configuring a metrics overview analytic, you can also select metrics without sets.

1. In the analytic edit panel, expand **Choose the sets to list in this analytic**.
2. Select the set you want to include:
   - **All available sets**
   - **All sets in these subject areas**

     If you select this option, choose the subject areas from the pane on the right.

   - **These specific sets**

     If you select this option, choose sets by selecting them in the left pane and adding them to the right pane.

3. If you selected **These specific sets**, add a prompt by clicking **Add** under the "Selected Sets" list box.

Membership

The Membership analytic, available with Set Analysis, finds trends for sets and allows you to view a selected set for a specified period.

Set Members reside in the set as of the most recent set refresh. Set Stayers have resided in the set through more than one refresh.

For example, if the same customer purchases a case of premium wine during the months of March and April, that customer is included in the Stayer and Member counts of the Wine Collector set.

Related Topics

• *What is a stayer?*

Migration

The Migration analytic, available with Set Analysis, shows the movement of members from one set to another in the form of a graph.

Note:
Use set-based metrics containing cross-set migrants for the Migration analytic. See the Set Analyis documentation for more information on sets. For more information on set metrics, see the Performance Manager documentation.

Multi-set Same Time Events

The Multi-set same time events analytic shows concurrent inflows and outflows over time.

Note:
Use set-based metrics containing the cross set joiner or leaver cross sets. For more information on sets, see the Set Analysis documentation. For more information on set metrics, see the Performance Manager documentation.

Set Joiners reside in the set as of, but not prior to, the last refresh.

Related Topics

• *What are multi-set metrics?*

• *What is a joiner?*

What are multi-set metrics?

For a particular set, you can select multiple subsets or measures or transformations to define multiple metrics. For a particular group, you can define metrics for each set that belongs to the group.

For a particular level of the tree list, you can refresh or purge all the metrics under this level. You can use a view by measure, by set, by subset or by group. Multi-set metrics enable you to track relationships between sets over time.

Four types of multi-sets metrics are built into the product:

- "Migrants"

  Migrants are individuals who left a given tier to join another given tier. Migrants in a given period from Set A to Set B are: Set A leavers of the period that joined Set B in that same period.

  Migrant metrics are applicable to temporal sets only. Also they are not commutative which means that Migrants from A to B are different from Migrants from B to A.

- "Overlapping members"

  Overlapping Members of Sets A and B are: Set A Members of the period that are also Members of Set B in that same period.

  Overlapping Members are applicable to temporal sets only. They are commutative which means that Overlapping Members of A and B are identical to Overlapping Members of B and A.

- "Same time Joiners"

  Same time joiners in a given period of Sets A and B are: Set A Joiners of the period that joined Set B in that same period.

  Same time joiners are applicable to temporal sets only. They are commutative which means that Same time joiners of A and B are identical to Same time joiners of B and A.

- "Same time Leavers"

  Same time leavers in a given period of Sets A and B are: Set A leavers of the period that left Set B in that same period.

  Same time leavers is applicable to temporal sets only. They are commutative which means that Same time leavers of A and B are identical to Same time leavers of B and A.

Profiler

The Profiler analytic, available in Set Analysis, analyzes the individual level information at the membership and metric levels. Use Individual Profiler to create sets to profile your customers in ways that answer your business questions.

Individual customers can belong to more than one set, or interest group. For example, individual customers can belong to a specific age group, geographical location, or marital status.

Customers can be classified, analyzed and treated in different ways using set techniques. You can create broad or specific sets to categorize your customers in ways that are relevant to your business.

Configuring the Profiler analytic

Profiler analyzes the individual level information at the membership and metric levels.

1. In the profiler edit panel, select the views that you want displayed in the analytic.

    To select or unselect all of the views under "Membership" or "Metrics", activate or deactivate them at the root level.

2. Select the subjects that you want listed.

    You can choose to view all subjects, or select from the list of available subjects.

3. Enter the ID.

    This ID corresponds to the column name in the set dimension table.

4. Click **OK** to save the configuration.

Related Topics

• *What is a subject?*

Visual Data Counts analytic

The Visual Data Counts analytic, available in Set Analysis, counts dimension objects in a set. You use this analytic to identify the set populations with significant amounts of members on which you can create analysis scenarios.

Visual data counts help you with set sampling.

You can perform the following functions using visual data counts:

- Navigate through the database using the predefined object trees to locate the categories of data required to fill the current set.
- Create your own object trees for data navigation.
- View the:
  - contents of the database categories in the detail windows. These detail windows provide information about the content of the categories and how they relate to other categories.
  - components of a category.
  - relationship between the upper and lower window categories as indicated in the object tree.
  - number of members currently in the set, shown in the application view bar.

Using Set Analyzer fast counts in visual data counts

A fast count is an pre-calculated, aggregate action created in Set Analyzer that summarizes segment counts. Fast counts speed the navigation of object trees which, in turn, speeds the process of selecting items in a set. If fast count is defined,the data retrieval is much faster because the data is already computed and store in set tables.

For more information on creating fast counts and object trees, see the Set Analyzer Administrator's Guide. For information on using object trees, see the Set Analyzer User's Guide.

Related Topics
- *What is an object tree?*
- *What is a fast count?*
- *What is a sampling?*

Configuring the Visual Data Counts analytic

1. In the visual data counts edit mode, expand the "Specify Visual Data Definition" section.

2. Select a set subject from the "Subject" dropdown list.

3. Select the source table from the "Source" dropdown list.

   The object tree appears in a dimension hierarchy list.

4. Select one or more dimensions and add them to the visual data count by clicking **>**.

   You can also select dimensions by double-clicking them.

   When you add an dimension to the list:

   • If you select a measure, the "Added Field Condition" panel appears, where you can assign a "Yes/No Condition".

     Note:
     This condition is optional and only available on dimensions that have a fast count. The condition you set refines the list of counts. If you want to see the counts for all of the dimension's items, deactivate the **Yes/No Condition** and click **OK**.

     When you add a dimension without a fast count, you cannot add a field condition. Choose to view exact counts.

     If the yes/no condition is the same for the measure, click **Default** to avoid the necessity of creating the condition more than once.

   • If you select a metric, a panel appears in which you select the type of count to place on the dimension. If there is a fast count assigned to the metric, choose **Estimates only**. If you, however prefer an exact count or do not have a fast count assigned to the metric, choose **Exact Counts**.

5. Click **Options** to configure the following analytic options:

   • Activate **Always use Source if required** if you do not want estimates and prefer the source fact tables always queried.

   • Activate **Always use Estimates if available** if you always want available fast counts used.

   • Activate **Default Yes/No conditions to Yes**.

When you select a dimension for a data count, the dimension defaults to no, and you select the members of the dimension that you want to use in the visual data count. Activating the option saves you time if you want to use all members for all visual data counts, or have the assumption of yes, and select the members that should not appear.

6. In the "Display Mode" section, select a mode.

Analytic display modes

The display formats are:

- SVG – Scalable Vector Graphics format. This format is less interactive than the applet.
- Applet – The Java Applet allows interactive editing of the analytic.
- Flash – Macromedia Flash provides a more interactive interface, and a zero footprint.
- HTML – The HTML display allows you to provide accessibility for 508-compliant analytics.

The display modes for the analytics are shown in the following table.

Analytic	SVG	Applet	Flash	HTML	DHTML
Alerts					X
Bubble chart			X		
Control chart	X				
Curve fitting			X		
Frequency histogram			X		
Gauge	X		X	X	
Goal			X		
Goal subscriptions					X
Goal-based influencer detail	X				

Analytic	SVG	Applet	Flash	HTML	DHTML
Individual list					X
Influencer detail	X				
Influencer gains chart	X				
Interactive metric trend	X		X	X	
Key influencers	X				
Lag plot			X		
Map	X		X		
Membership	X	X			
Metric forecaster	X				
Metric list					X
Metric tree	X				
Metrics overview	X	X			
Migration	X	X			
Model gains chart	X				
Multi-set same time events	X	X			
Navigation list					X
Normal probability			X		
Pareto			X		
Pie chart			X		
Profiler		X			
Radar chart			X		

Analytic	SVG	Applet	Flash	HTML	DHTML
Scorecard					X
Smoothing			X		
Strategy Map	X				
Text				X	
Variable profile box plot	X				
Visual data counts	X	X			
Web page				X	

Set analytics in the Analytic Catalog

The **Set Analytics** samples are based on Web Intelligence queries are organized in the following categories:

- Membership Analysis analytics:
  - Membership breakdown
  - Membership change
  - Membership status
- Set Metrics analytics:
  - Multi set scatter
  - Percent of group total
  - Percent of enterprise
  - Set compare
  - Set vs enterprise
  - Set vs group average
  - Set vs group total growth
  - Set vs group turnover
- Migration analytics:
  - Migrants compare
  - Migration by tier

Membership breakdown

Membership Breakdown is a sample Set Analysis analytic in the Dashboard Builder Analytic Catalog that shows how the number of members is decomposed into joiners and stayers rates (positive bars) over time. They can be compared to the leavers rate represented as negative bars.

Migrants compare

Migrants compare is a sample Set Analytic in the Dashboard Builder Analytic Catalog that compares metrics based on migrants. The standard net flow enables the comparison of metrics that are measured in different units. For this analysis to run, migrants metrics must be defined.

Migration by tier

Migration by Tier is a sample Set Analyic in the Dashboard Builder Analytic Catalog that is useful for seeing general migration trends toward high-tier or low-tier sets. Migration by Tier is a tabular analysis which shows the number of migrants between sets representing different tiers as well as the amount of overall up-migration and down-migration.

For this analysis to run, the names of the sets must have an alpha-numeric ordering that represents their relative positions (for example, Tier 1, Tier 2, Tier) and migrants metrics must be defined.

Multi set scatter

Multi-set scatter is a sample Set Analytic scatter plot in the Dashboard Builder Analytic Catalog that compares joiners, leavers and stayers rates with respect to the current values of the metrics simultaneously, for example, cost and revenue.

Multi-set scatter shows a snapshot of two or more subsets of a set. Two metrics define the scatter-plot X-Y axes.

Tip: You can easily page through different periods.

Use this analysis to compare simultaneously current values for differing subsets with respect to two measures. For example, if you want to know whether a trend in revenue/cost ratios has emerged among Joiners and Leavers, you can plot Revenue vs. Cost for Joiners and Leavers and compare their relative positions.

Percent of group total

Percent of total group is a sample Set analytic in the Dashboard Builder Analytic Catalog that shows how much a set contributes to the total of a group. It is appropriate for use with mutually exclusive sets.

Percent of total group compares two metrics that are measured in different units. Applied to a set of mutually exclusive tiers that covers all the individuals, with a Count metric (for example, Number of individuals) and a Revenue metric, this analysis is a 80:20 rule chart over time.

Percent of enterprise

Percent of Enterprise is a sample Set analytic in the Dashboard Builder Analytic Catalog that shows how much a set contributes to the enterprise total. The formula for Percent of Enterprise is:

```
Set Metric / Enterprise Metric
```

Set compare

Set compare is a sample Set analytic in the Dashboard Builder Analytic Catalog that is useful for comparing sets at a point in time. Set compare distinguishes the sets that are above the average (blue flat line) from those that are below.

Set vs enterprise

Set vs Enterprise is a sample Set analytic in the Dashboard Builder Analytic Catalog that is useful for benchmarking a set metric against the enterprise. Percent of origin makes the two lines start at the same value (100%) in order to facilitate the comparison.

Set vs group average

Set vs Group average is a sample Set analytic in the Dashboard Builder Analytic Catalog that is useful for benchmarking a set raw value against the average value of a group.

Group average is calculated by averaging the values of the sets within the group.

Set vs group total growth

Set vs total growth is a sample Set analytic in the Dashboard Builder Analytic Catalog that is useful for benchmarking a set raw value against the group total growth.

Total Growth solves the scale issue of set raw value versus group total. It makes the group total trend relative to the starting value of the set trend, so that the group total growth always starts with the same value as the set trend.

Set vs group turnover

Set vs Group turnover is a sample Set analytic in the Dashboard Builder Analytic Catalog that is useful for benchmarking the turnover of a set against the turnover of a group.

Set vs Group turnover reveals the amount of change, or churn, that has occurred in a membership. The period of analysis here corresponds to the set refresh period.

No metrics are required for this analysis to run.

Linking from goal, universe query and metric-based analytics

Linking to multiple documents from an analytic based on a goal, metric or universe query

You can create links to multiple documents from a goal or metric-based analytic. This is particularly useful for analytic drill down.

1. How you access the options for linking analytics to other documents, depends on whether you are creating a new analytic or editing an existing analytic.
   - If you are creating an analytic, do one of the following in InfoView:
     - Go to **Open** > **Dashboard Builder** > **Create New Analytic**.
     - Go to **Document List** > **New** > **Analytic**.
   - If you are editing an analytic, select the analytic, then click **Edit**.

2. Expand **Navigation**.

3. The next step depends on whether you want:
   - If you want to link the title of the analytic to multiple documents, click **Multiple Links** below "Use Legend/Title as hyperlink to go to".
   - If you want to provide data point navigation, so that users can click a metric result and then view a filtered document that shows other results for that specific time period, click **Multiple Links** below "Use data point as hyperlink to go to".

   The Edit Navigation Link dialog box appears.

4. Click **Add**, then click **Browse** to select the document or, if you want to link to a web page, type the URL into the text box.

5. You can add several links to documents here.

6. Click **Update**, then click **OK**.

   The link to the multiple documents appears.

For example:

```
Drill Down Group Level||openAnalytic.jsp?Document
Name=Drill+Down+Group+Level&RepositoryType=C&Reposito
ryName=Feature Examples&DocumentExt=rpt&DocumentId=AW
bJOJEYvvVMnbtXEQ2An0s&sContentType=OnDe
mand&mode=full||TotalSales.rpt||openAnalytic.jsp?Docu
mentName=TotalSales.rpt&RepositoryType=C&Repository
Name=Feature Samples&DocumentExt=rpt&DocumentId=AdLEd
dSQNTlDhMiLiHoD7II&sContentType=OnDe
mand&mode=full||Business Objects||http://www.busines
sobjects.com
```

In this example the multiple link is created to:

- Drill Down Group Level
- TotalSales report
- www.businessobjects.com

The syntax of the links is as follows:

```
name1||URL||name2||URL||name3||URL
```

7. To check the links, click **OK**.

The analytic appears.

8. Place your cursor on a data point or the title.

If the links are defined correctly, a popup menu appears with list of destination documents.

9. Click the destination document of your choice.

Note:
When linking from goal and predictive analytics you must enter the link manually.

Related Topics
- *OpenAnalytic variables used in goal, metric and universe query analytics*
- *Using variables for dynamic links to documents*

Linking from a goal, metric or universe query-based analytic to a document or analytic

Adding links to analytics allows end users navigate from an analytic to other analytics or documents that provide information for further analysis.

You can include prompt parameters in links. Adding prompt parameters means that the data displayed on the target analytic or document is dynamically generated according to the values displayed on the first analytic.

1. How you access the options for linking analytics to other documents depends on whether you are creating an analytic or editing an existing analytic:

   • If you are creating an analytic, do one of the following in InfoView:

      • Go to **Open** > **Dashboard Builder** > **Create New Analytic**.
      • Go to **New** > **Analytic**.

   • If you are editing an analytic, select the analytic, then click **Edit**.

2. Expand **Navigation**.

3. The next step depends on whether you want to link the title or data points to a destination document:

   • If you want to link the title of the analytic to multiple documents, click **Browse** below "Use Legend/Title as hyperlink to go to".

   • If you want to provide data point navigation, so that users can click a metric result to view a filtered document that shows other results for that specific time period, click the **Browse** below "Use data point as hyperlink to go to".

   The "Edit Navigation Link Menu" dialog box appears.

4. Click **Add**, then **Browse** to select the document or, if you want to link to a web page, type the URL into the text box.

   Note:
   When linking from goal and predictive analytics you must enter the link manually.

5. Click **Update**, then click **OK**.

The URL to the document appears in the URL box. The URL reads as follows:

```
openAnalytic.jsp?DocumentName=<FILE_NAME>
&RepositoryType= C&RepositoryName=<REPOSITORY_NAME>
&DocumentExt=<EXTN>& DocumentId=<DOCID>
&sContentType=OnDemand&mode=full
```

6. To check the links, click **OK**.

   The analytic appears.

7. Place your cursor on a data point or the title.

8. When your cursor turns into a hand sign, click the data point or title.

   The destination document appears.

Related Topics
- *OpenAnalytic variables used in goal, metric and universe query analytics*
- *Linking to multiple documents from an analytic based on a goal, metric or universe query*
- *Using variables for dynamic links to documents*
- *Using variables for dynamic links to documents*

Using variables for dynamic links to documents

You can include variables in the links to documents so that the destination document is filtered by the values for a specific metric, dimension, goal or set.

Related Topics
- *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables used in goal, metric and universe query analytics

The following table gives a description of each variable you can use when used in creating links between analytics.

Note:
A universe query analytic where a prompt is defined can use all of the
OpenAnalytic variables.

Variable	Description
$METRIC_ID$	Metric ID
$METRIC_NAME$	Metric Name
$SUBJECT_ID$	Subject ID
$SUBJECT_NAME$	Subject name
SET_ID	Set ID
SET_NAME	Set Name
$SET2_ID$	2nd Set ID (when metric based on two sets)
$SET2_NAME$	2nd Set Name (when metric based on two sets)
$POPULATION_ID$	Population ID
$POPULATION_NAME$	Population Name
DIM_ID	Dimension ID
DIM_NAME	Dimension Name
$DIM2_ID$	2nd Dimension ID
$DIM2_NAME$	2nd Dimension Name
$GOAL_NAME$	Name of goal associated with analytics
$GOAL_ID$	ID of goal associated with analytics
$SLICE_CODE$	Value of the slice (code)
$SLICE_NAME$	Value of the slice (name)
$CONDITION_ID$	Class Id from the source universe

Variable	Description
$MEASURE_NAME$	Measure Name
MIN_SLICE	First slice of the dimension used for x-axis (QOU)
MAX_SLICE	Last slice of the dimension used for x-axis (QOU)
$CURRENT_SLICE$	Current slice of the dimension used for x-axis (QOU)
$BEGIN_DATE$	Begin Date of the displayed period
END_DATE	End Date of the displayed period
$CURRENT_DATE$	Current period (corresponds to a data point in a trend)
MAP_CODE	Code for the current region displayed
MAP_NAME	Name of current region displayed
$MAP_LONGNAME$	Long name of current region displayed
$MODEL_ID$	Model ID
$INFLUENCER_ID$	Influencer ID
$INFLUENCER_NAME$	Influencer Name

OpenAnalytic variables for Goal variance and Pareto analytics

Pareto analytic

You can only use the $METRIC_ID$ variable to link from a Pareto analytic.

Goal variance analytics

You can use the following variables to link from Goal Variance analytics:

- $CONDITION_ ID$
- $CONDITION_ NAME$

- DIM_ID
- $DIM_ NAME$
- $GOAL_ ID$
- $MEASURE_ NAME$
- $METRIC_ ID$
- $METRIC_ NAME$
- $POPULATION_ ID$
- $POPULATION_ NAME$
- $SET_ ID$
- $SET_ NAME$
- $SET2_ ID$
- $SET2_ NAME$
- $SLICE_ CODE$
- $SLICE_ NAME$
- $SUBJECT_ ID$
- $SUBJECT_ NAME$
- $USER$

Note:
A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics
• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Map analytics

This table shows which variables can be used to link from Map analytics that use metrics or a universe query.

Note:
A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Variable	Map analytic using metrics		Map analytic using a universe query	
	Title link	Map item link	Title link	Map item link
$METRIC_ ID$	X	X	X	X
$METRIC_ NAME$	X	X	X	X
$SUBJECT_ ID$	X	X	X	X
$SUBJECT_ NAME$	X	X	X	X
SET_ID	X	X	X	X
$SET_ NAME$	X	X	X	X
$SET2_ID$	X	X	X	X
$SET2_ NAME$	X	X	X	X
$POPULATION_ ID$	X	X	X	X
$POPULATION_ NAME$	X	X	X	X
DIM_ID	X	X	X	X
DIM_NAME	X	X	X	X
$GOAL_NAME$				X
$GOAL_ID$			X	X
$SLICE_CODE$	X		X	X
$SLICE_NAME$	X		X	X
$CONDITION_ ID$	X	X	X	X

Variable	Map analytic using metrics		Map analytic using a universe query	
	Title link	Map item link	Title link	Map item link
$CONDITION_ NAME$	X	X	X	X
$MEASURE_ NAME$	X	X	X	X
$BEGIN_DATE$			X	X
END_DATE			X	X
MAP_CODE		X	X	X
MAP_NAME	X	X	X	X
$MAP_ LONG- NAME$		X		X
$USER$	X	X	X	X

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Metric List and Strategy Map analytics

This table shows which variables can be used to link from Metric Lists and Strategy Maps analytics (only when based on goals, metrics or universe queries).

Variable	Metric List	Strategy Map
	Title link	Attached analytic
$METRIC_NAME$	X	X

Variable	Metric List	Strategy Map
	Title link	Attached analytic
$SUBJECT_ID$	X	X
$SUBJECT_ NAME$	X	X
SET_ID	X	X
SET_NAME	X	X
$SET2_ID$	X	X
$SET2_NAME$	X	X
$POPULATION_ ID$	X	X
$POPULATION_ NAME$	X	X
DIM_ID	X	X
DIM_NAME	X	X
$GOAL_NAME$	X	X
$SLICE_CODE$	X	X
$SLICE_NAME$	X	X
$CONDITION_ID$	X	X
$CONDITION_ NAME$	X	X
$MEASURE_ NAME$	X	X
$USER$	X	X

Note:
A universe query analytic where a prompt is defined can use all of the
OpenAnalytic variables.

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Metric Tree and Metrics Overview analytics

This table shows which variables can be used to link from Metric Trees and Metrics Overview analytics.

Note:
A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Variable	Metric Tree	Metrics Overview	
	Attached Analytic	Set Name Link	Datapoint Link
$METRIC_ID$	X		
$METRIC_NAME$	X		X
$SUBJECT_ ID$	X		X
$SUBJECT_ NAME$	X	X	X
SET_ID	X	X	X
SET_NAME	X	X	X
$POPULATION _ID$	X		X
$POPULATION _NAME$	X		X
DIM_ID	X		X
DIM_NAME	X		X
$GOAL_NAME$	X		
$GOAL_ID$	X		
$SLICE_ CODE$	X		X

Variable	Metric Tree	Metrics Overview	
	Attached Analytic	Set Name Link	Datapoint Link
$SLICE_ NAME$	X		X
$CONDITION _ID$	X		X
$CONDITION _NAME$	X		X
$MEASURE _NAME$	X		X
$BEGIN_DATE$			X
END_DATE			X
$CURRENT _DATE$			X
$USER$	X	X	X

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for most volatile metrics and Set Membership analytics

This table shows which variables can be used to link from most volatile metrics and set membership analytics.

Variable	Most Volatile Metrics		Set Membership
	Analytic Link	Datapoint	Datapoint
$METRIC_ID$	X	X	
$METRIC_NAME$	X	X	
$SUBJECT_ID$	X	X	X
$SUBJECT_NAME$	X	X	X

| Variable | Most Volatile Metrics | | Set Membership |
	Analytic Link	Datapoint	Datapoint
SET_ID	X	X	X
SET_NAME	X	X	X
$SET2_ID$	X	X	
$SET2_NAME$	X	X	
$POPULATION_ID$	X	X	
$POPULATION_NAME$	X	X	
DIM_ID	X	X	
DIM_NAME	X	X	
$SLICE_CODE$	X	X	
$SLICE_NAME$	X	X	
$CONDITION_ID$	X	X	
$CONDITION_NAME$	X	X	
$MEASURE_NAME$	X	X	
$BEGIN_DATE$	X	X	
END_DATE	X	X	
$CURRENT_DATE$	X	X	
$USER$	X	X	X

Note:
A universe query analytic where a prompt is defined can use all of the
OpenAnalytic variables.

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Key Influencers analytics

The following variables can be used to link from Key Influencers analytics:

• $MODEL_ID$
• $INFLUENCER_ID$
• $INFLUENCER_NAME$

Note:

A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for the Metric Forecaster analytic

The following variables can be used to link to Metric Forecaster analytic:

• $METRIC_ ID$
• $BEGIN_ DATE$
• $END_ DATE$

OpenAnalytic variables for the Interactive Metric Trend analytic

This table shows the variables can be used to link from Interactive Metric Trends based on goals, metrics or universe queries.

Variable	Legend	Datapoint
$METRIC_ID$	X	X
$METRIC_NAME$	X	X
$SUBJECT_ ID$	X	X
$SUBJECT_ NAME$	X	X
SET_ID	X	X

Variable	Legend	Datapoint
SET_NAME	X	X
$SET2_ID$	X	X
$SET2_NAME$	X	X
$POPULATION_ ID$	X	X
$POPULATION_ NAME$	X	X
DIM_ID	X	X
$DIM_ NAME$	X	X
$SLICE_ CODE$	X	X
$SLICE_ NAME$	X	X
$CONDITION_ ID$	X	X
$CONDITION_ NAME$	X	X
$MEASURE_ NAME$	X	X
$MIN_ SLICE$	X	X
$MAX_ SLICE$	X	X
$CURRENT_ SLICE$		X
$USER$	X	X
$BEGIN_DATE$	X	X
$CURRENT_DATE$		X
END_DATE	X	X

Note:

A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for a Migration analytic

The following variables can be used to link from a datapoint in the Migration analytic for set analysis:

• $SUBJECT_ID$
• $SUBJECT_ NAME$
• SET_ID
• SET_NAME
• $USER$

Note:

A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics

• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Gauge analytics

This table shows which variables can be used to link from Gauges.

Variable	Metric	Universe query
$METRIC_ ID$	X	
$METRIC_ NAME$	X	
$SUBJECT_ ID$	X	
$SUBJECT_ NAME$	X	
SET_ID	X	
SET_NAME	X	

Variable	Metric	Universe query
$SET2_ID$	X	
$SET2_NAME$	X	
$POPULATION _ID$	X	
$POPULATION _NAME$	X	
DIM_ID	X	X
DIM_NAME	X	X
$DIM2_ID$		X
$DIM2_NAME$		X
$GOAL_NAME$	X	
$GOAL_ID$	X	
$SLICE_ CODE$	X	
$SLICE_ NAME$	X	X
$CONDITION _ID$	X	
$CONDITION _NAME$	X	
$MEASURE _NAME$	X	X
MIN_SLICE		X
MAX_SLICE		X
$CURRENT _SLICE$		X
$BEGIN_DATE$	X	
END_DATE	X	
$CURRENT _DATE$	X	

Variable	Metric	Universe query
$USER$	X	

OpenAnalytic variables for the Pie, Bubble and Radar Charts

The following table shows which variables can be used to link from the Pie, Bubble and Radar charts:

Variable	Pie Chart	Bubble Chart	Radar Chart
$METRIC_ ID$	X	X	
$METRIC_ NAME$	X	X	
$GOAL_ ID$	X		
$GOAL_ NAME$	X		
$BEGIN_ DATE$	X	X	X
$END_ DATE$	X	X	X
$CURRENT_ DATE$	X	X	X

Note:
A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics
• *OpenAnalytic variables used in goal, metric and universe query analytics*

OpenAnalytic variables for Data Exploration analytics

The following variables can be used to link from the Data Exploration analytics, which include Lag Plot, Frequency Histogram, Normal Probability Plot, Smoothing and Curve Fitting :

• $METRIC_ID$

- $METRIC_NAME$
- $BEGIN_DATE$
- END_DATE
- $CURRENT_DATE$

Note:
A universe query analytic where a prompt is defined can use all of the OpenAnalytic variables.

Related Topics
• *OpenAnalytic variables used in goal, metric and universe query analytics*

nbPrompts

nbPrompts is a parameter used in customized links between analytics and documents stored on the Central Management Server in which prompts are allowed, including analytics, Crystal Reports, Desktop Intelligence and Web Intelligence documents. Using nbPrompts, you can fill the prompt(s) in the target document with openAnalytic variables.

nbPrompts syntax in links from goal and metric-based analytics

The following are examples of nbPrompts syntax:

```
openanalytic.jsp?...&mode=full&nbPrompts=1
&[analytic_prompt_name]=$METRIC_NAME$
```

```
openanalytic.jsp?...&mode=full&nbPrompts=3
&[analytic_prompt1]=$METRIC_NAME$&[analytic_prompt2]=
$BEGIN_DATE$&[analytic_prompt3]=$END_DATE$
```

where `openanalytic.jsp?...&mode=full` is automatically included in the address when you select the target document, and you add the remaining text using the following syntax:

```
&nbPrompts=[#]&[analytic_prompt_name]=
$METRIC_NAME$
```

where you replace [#] with the number of prompts, and for each prompt you add the string &[analytic_prompt_name]=$METRIC_NAME$, where [analytic_prompt_name] is replaced with the name of the prompt in the analytic or document.

Using openDocument in dashboards and analytics

The openDocument.jsp uses the "opendoc" context to open objects from a document or dashboard in InfoView.

Use the following syntax:

```
/OpenDocument/opendoc/
openDocument.jsp?iDocID=vscmMCXk
&sIDType=CUID&sType=null&sInstance=Last
```

where `vscmMCXk` is the ID of the dashboard.

Note:
Use relative instead of absolute links to documents in InfoView, in the case where you plan to migrate servers.

To use openDocument to open a dashboard from a document or dashboard:

```
/OpenDocument/opendoc/openDocument.jsp?
iDocID=vscmMCXk&sIDType=CUID&sType=null
```

To use openDocument to open an analytic from a document or dashboard:

```
/OpenDocument/opendoc/openDocument.jsp?
iDocID=vscmMCXk&sIDType=CUID&sType=null
```

Example: sInstance in openDocument syntax

Use the parameter `sInstance=Last` with the OpenDocument function to retrieve the last instance of a Web Intelligence or Desktop Intelligence report. You must specify the fully-qualified URL of the target document for the parameter to take effect.

Note:
`sInstance=Last` has no effect in the OpenAnalytic function.

URL reporting using openDocument

URL reporting using openDocument provides URL access to multiple document types by passing a URL string to a BusinessObjects Enterprise server. openDocument provides commands to control how reports are generated and displayed.

You can use openDocument in BusinessObjects Enterprise to create cross-system links to and from the following document types:

- .wid: Web Intelligence documents

- .rep: Desktop Intelligence documents

- .rpt: Crystal reports

- .car: OLAP Intelligence reports

Structuring an openDocument URL

The next sections explain how to use the openDocument function, and how to construct the URL.

An openDocument URL is generally structured as follows:

```
http://<servername>:<port>/OpenDocument/opendoc/<platform
Specific>?<parameter1>&<parameter2>&...&<parameterN>
```

The exact syntax of the `<platformSpecific>` parameter depends on your implementation:

- For Java implementations, use `openDocument.jsp` in place of the `<platformSpecific>` parameter.

- For .NET implementations, use `opendocument.aspx` in place of the `<platformSpecific>` parameter.

The URL is constructed using the parameters listed in *openDocument parameter overview*

Joining parameters

Join parameters with the ampersand (&). Do not place spaces around the ampersand. For example: `sType=wid&sDocName=Sales2003`

The ampersand is always required between parameters.

Spaces and special characters in parameter values

Because some browsers cannot interpret spaces, the parameters of the link cannot contain spaces or other special characters that require URL encoding. To avoid the misinterpretation of special characters, you can define a URLEncoded string in the source database to replace the special character

with an escape sequence. This will allow the database to ignore the special character and correctly interpret the parameter value. Note that certain RDBMS have functions that allow you to replace one special character with another.

By creating an escape sequence for the plus sign (+), you can instruct the database to interpret the plus sign as a space. In this case, a document title Sales Report for 2003 would be specified in the DocName parameter as:

```
&sDocName=Sales+Report+for+2003&
```

This syntax prevents the database from misinterpreting the spaces in the title.

Trailing spaces in parameter values

Trim trailing spaces at the end of parameter values and prompt names. Do not replace them with a plus sign (+). The viewer may not know whether to interpret the plus sign (+) as part of the prompt name or as a space. For example, if the prompt name displays:

```
Select a City:_
```

(where _ represents a space), enter the following text in the link:

```
lsSSelect+a+City:=Paris
```

where the spaces within the prompt name are replaced with the plus sign, and the trailing space is trimmed off.

For details on prompt parameters of the link, refer to *openDocument parameter overview* .

Capitalization

All of the openDocument parameters are case sensitive.

Link length limit

The encoded URL cannot exceed 2083 total characters.

Parameter values in links to sub-reports

You cannot pass parameter values to a sub-report of a target Crystal report.

Using the IsS parameter with OLAP Intelligence reports

If the target document is an OLAP Intelligence report (.car) you can use the IsS parameter to specify prompts. The parameters are passed in as a URL-encoded string using the unique name of the parameter set up in the OLAP Intelligence report.

Example: Opening a report to a specific page

If `23CAA3C1-8DBB-4CF3-BA%2CB8%2CD7%2CF0%2C68%2CEF%2C9C%2C6F` is the URL-encoded unique name for the page parameter in the OLAP Intelligence report, you would use the following URL to open the OLAP Intelligence report to page 2:

```
http://<servername>:<port>/OpenDocument/<platformSpecif
ic>?sType=car&sIDType=InfoObject&iDocID=440&lsS23CAA3C1-
8DBB-4CF3-BA%2CB8%2CD7%2CF0%2C68%2CEF%2C9C%2C6F=2
```

Example: Opening a cube parameter

If `8401682C-9B1D-4850-8B%2C5E%2CD9%2C1F%2C20%2CF8%2C1%2C62` is the URL-encoded unique name for the cube parameter opening the warehouse cube in the catalogue FoodMart 2000 on MSAS, you would use the following URL to open this cube parameter:

```
http://<servername>:<port>/OpenDocument/<platformSpecif
ic>?sType=car&sIDType=InfoObject&lsS8401682C-9B1D-4850-
8B%2C5E%2CD9%2C1F%2C20%2CF8%2C1%2C62=CATALOG%3DFood
Mart%202000,CUBE%3Dwarehouse&iDocID=616
```

Using the IsM parameter with OLAP Intelligence reports

If the target document is an OLAP Intelligence report (.car) you can use the IsM parameter to specify prompts. The parameters are passed in as a URL-encoded string using the unique name of the parameter set up in the OLAP Intelligence report.

As was the case for the IsS parameter, IsM parameters are also passed in as a URL-encoded string using the unique name of the parameter set up in the OLAP Intelligence report.

Example: Opening a report

```
http://<servername>:<port>/OpenDocument/<platformSpecif
ic>?sType=car&sIDType=InfoObject&lsMADC216EA-D9A5-42B5-
AE%2C21%2C84%2CA9%2CF9%2C6E%2C31%2C7=[%5BCus
tomers%5D.%5BCountry%5D.%26%5BMexico%5D],[%5BCus
tomers%5D.%5BCountry%5D.%26%5BCanada%5D]&iDocID=544
```

This is a memberset parameter opening up a report with Customers >
Country > Mexico and Customers > Country > Canada in the view.

openDocument parameter overview

This section provides a brief overview of openDocument and includes a list
of available parameters. Details about the available parameters, their specific
uses, and relevant examples are also provided.

Note:
The document containing the openDocument link is called the parent
document, and it resides on the parent system. The document to which the
link points is called the target document, and it resides on the target system.

Table 4-10: Platform Parameters

Parameter	Description
iDocID	Document identifier.
sDocName	Document name.
sIDType	Crystal object type.
sKind	The file type of target Desktop Intelligence document.

Parameter	Description
sPath	The name of the folder and subfolder containing the target document.
sType	The file type of target document or report.
token	A valid logon token for the current CMS session.

Table 4-11: Input Parameters

Parameter	Description
lsC	Specifies a contextual prompt if there is an ambiguity during SQL generation (Business Objects and Web Intelligence documents only).
lsM[NAME]	Specifies multiple values for a prompt, `[NAME]` is the text of the prompt
lsR[NAME]	Specifies a range of values for a prompt, `[NAME]` is the text of the prompt.
lsS[NAME]	Specifies a value for a single prompt. `[NAME]` is the text of the prompt.
sInstance	Indicates which specific instance of the target report to open.

Parameter	Description
sPartContext	In Crystal Reports, a report part is associated to a data context.
sRefresh	Indicates whether a refresh should be forced when the target document or report is opened.
sReportMode	For Crystal targets only, indicates whether the link should open the full target report or just the report part specified in `sReportPart`.
sReportName	Indicates which report to open if target document is multi-report.
sReportPart	Indicates which specific part of the target report to open.

Table 4-12: Output Parameters

Parameter	Description
NAII	Forces the display of the prompt selection page.
sOutputFormat	Indicates the format in which the target document is opened.
sViewer	Indicates the selected report viewer (CR & CA only).

Parameter	Description
sWindow	Indicates whether the target report will open in the current browser window or whether a new window will be launched.

openDocument platform parameters

This section details the openDocument platform parameters that are available and gives examples on how to use the commands.

An openDocument URL is generally structured as follows:

```
http://<servername>:<port>/OpenDocument/opendoc/<platform
Specific>?<parameter1>&<parameter2>&...&<parameterN>
```

The exact syntax of the `<platformSpecific>` parameter depends on your implementation:

- For Java implementations, use `openDocument.jsp` in place of the `<platformSpecific>` parameter.
- For .NET implementations, use `opendocument.aspx` in place of the `<platformSpecific>` parameter.

Note:
Variables are denoted with angle brackets. You must substitute the proper value for these variables. For example, you must use the name of your server in place of `<servername>` where it is contained in the code samples below, and you must use your port number in place of `<port>`.

iDocID

Syntax	Description	Mandatory?	Values
iDocID	Document identifier.	Yes*	Document identifier (In-foObjectID).

Note:

*One of `sDocName` or `iDocID` is mandatory.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDocID=2010
```

Note:

To obtain the document ID, navigate to the document within the Central Management Console (CMC). The properties page for the document contains the document ID and the CUID. Use this value for the `iDocID` parameter.

sDocName

Syntax	Description	Mandatory?	Values
sDocName	Document name without extension If multiple documents have the same name, specify the correct document with `iDocID`.	Yes*	Document name.

Note:

*One of `sDocName` or `iDocID` is mandatory.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+200
```

sIDType

Syntax	Description	Mandatory?	Values
sIDType	Central Management Server (CMS) object identifier type.	Yes*	• CUID • GUID • RUID • ParentID • InfoObjectID (default)

Note:
*Only mandatory if the target is a Crystal report or OLAP Intelligence report (sType=rpt or sType=car) in an Object Package. Otherwise, use sPath and sDocName.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?iDocID=2010&sIDType=CUID
```

sKind

Syntax	Description	Mandatory?	Values
sKind	The file type of target Desktop Intelligence document.	Yes*	• FullClient

Note:
*Only mandatory if the target is a Desktop Intelligence document. Otherwise, use sType.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sKind=FullClient
```

sPath

Syntax	Description	Mandatory?	Values
sPath	The name of the folder and subfolder containing the target document.	Yes*	Folder and/or subfolder: `[folder],[subfold er]`

Note:

*Only mandatory if a value is specified for `sDocName` and is not unique.

`sPath` is used only with subfolders of the `Public Folders` folder. If your document is outside of the `Public Folders` folder, for example in the `My Favorites` folder, use the `iDocID` parameter instead of `sPath` and `sDocName`.

Do not add `[Public+Folders]` to the path; start with the name of the first subfolder within `Public Folders`.

```
Public Folders
    folder 1
      folder 1.1
         folder 1.1.1
```

If your document were in folder 1.1.1, you would set `sPath` to: `[fold er+1],[folder+1.1],[folder+1.1.1]`.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2005
```

sType

Syntax	Description	Mandatory?	Values
`sType`	The file type of target document or report.	Yes	• `wid` • `rpt` • `car`

Note:
This parameter is ignored for agnostic documents.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid
```

token

Syntax	Description	Mandatory?	Values
`token`	A valid logon token for the current CMS session.	No	The logon token for the current CMS session.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=Sales+in+2003&token=<lo
gonToken>
```

openDocument input parameters

This section details the openDocument input parameters that are available and gives examples on how to use the commands.

An openDocument URL is generally structured as follows:

```
http://<servername>:<port>/OpenDocument/opendoc/<platform
Specific>?<parameter1>&<parameter2>&...&<parameterN>
```

The exact syntax of the `<platformSpecific>` parameter depends on your implementation:

- For Java implementations, use `openDocument.jsp` in place of the `<platformSpecific>` parameter.

- For .NET implementations, use `opendocument.aspx` in place of the `<platformSpecific>` parameter.

Note:
Variables are denoted with angle brackets. You must substitute the proper value for these variables. For example, you must use the name of your server in place of `<servername>` where it is contained in the code samples below, and you must use your port number in place of `<port>`.

lsC

Syntax	Description	Mandatory?	Values
`lsC`	Specifies a contextual prompt if there is an ambiguity during SQL generation (Business Objects and Web Intelligence documents only). **Note:** Not supported by OLAP Intelligence	No	A prompt value that resolves the ambiguity in the SQL generation.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDo
cID=2010&lsC=Sales
```

lsM[NAME]

Syntax	Description	Mandatory?	Values
`lsM[NAME]`	Specifies multiple values for a prompt. `[NAME]` is the text of the prompt.	No	• Multiple prompt values, separated by a comma. If the target is a Crystal report, each value must be enclosed in square brackets. If the target is a OLAP Intelligence report, use the MDX WITH clause. • `no_value` (only for optional parameters)

Note:

- You can remove an optional parameter from the prompt by setting it to `no_value` in the openDocument query string. If you leave an optional parameter out of the openDocument query string, a default parameter value will be applied.
- The character `?` is a reserved prompt value for Web Intelligence documents in an openDocument URL. Setting the prompt value to `lsM[NAME]=?` in the URL forces the "Prompts" dialog box to appear for that particular prompt.
- For information on using this parameter with OLAP reports, see *Using the lsM parameter with OLAP Intelligence reports* .

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=rpt&sDocName=SalesReport&lsMSe
lect+Cities=[Paris],[London]
```

lsR[NAME]

Syntax	Description	Mandatory?	Values
`lsR[NAME]`	Specifies a range of values for a prompt. `[NAME]` is the text of the prompt. **Note:** Not supported by OLAP Intelligence	No	• A range of values for the prompt, separated by a double period (..). If the target is a Crystal report, the range must be enclosed in square brackets and/or parentheses (use a square bracket next to a value to include it in the range, and parentheses to exclude it). • `no_value` (only for optional parameters)

Note:
You can remove an optional parameter from the prompt by setting it to `no_value` in the openDocument query string. If you leave an optional parameter out of the openDocument query string, a default parameter value will be applied.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=rpt&sDocName=SalesReport&lsRTime+Pe
riod:=[2000..2004)
```

lsS[NAME]

Syntax	Description	Mandatory?	Values
lsS[NAME]	Specifies a value for a single prompt. [NAME] is the text of the prompt.	No	• A single prompt value. • no_value (only for optional parameters)

Note:

- You can remove an optional parameter from the prompt by setting it to no_value in the openDocument query string. If you leave an optional parameter out of the openDocument query string, a default parameter value will be applied.
- The character ? is a reserved prompt value for Web Intelligence documents in an openDocument URL. Setting the prompt value to lsS[NAME]=? in the URL forces the "Prompts" dialog box to appear for that particular prompt.
- For information on using this parameter with OLAP reports, see *Using the lsS parameter with OLAP Intelligence reports*.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDo
cID=2010&lsSSelect+a+City=Paris
```

sInstance

Syntax	Description	Mandatory?	Values
sInstance	Indicates which specific instance of the target report to open.	No	• `User` (Link to latest instance owned by current user) • `Last` (Link to latest instance for report) • `Param` (Link to latest instance of report with matching parameter values)

Note:
Use this parameter in combination with `sDocName`.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sReportPart=Part1&sInstance=User
```

sPartContext

Syntax	Description	Mandatory?	Values
sPartContext	In Crystal Reports, a report part is associated to a data context.	Yes*	Data context of the report part.

Note:
*Only mandatory if a value is specified for `sReportPart`.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2005&sReportPart=Part1&sPartContext=0-4-
0
```

Note:

The `sReportPart` and `sPartContext` parameters are supported with the regular DHML viewer (`sViewer=html`). Instead of the first page of the report, the DHTML viewer displays the page and context containing the part with the part highlighted.

sRefresh

Syntax	Description	Mandatory?	Values
sRefresh	Indicates whether a refresh should be forced when the target document or report is opened.	No	• `Y` (forces the document's refresh) • `N` (note that the refresh on open feature overrides this value)

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDo
cID=2010&sRefresh=Y
```

sReportMode

Syntax	Description	Mandatory?	Values
sReportMode	For Crystal targets only, indicates whether the link should open the full target report or just the report part specified in sReportPart.	No	• Full • Part

Note:
Defaults to Full if this parameter is not specified. Only applies if a value is specified for sReportPart.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sReportPart=Part1&sReportMode=Part
```

sReportName

Syntax	Description	Mandatory?	Values
sReportName	Indicates which report to open if target document is multi-report.	No	Report name for Web Intelligence documents, sub-report for Crystal Reports, pages for OLAP Intelligence reports.

Note:
Defaults to the first report if this parameter is not specified.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=Sales+in+2003&sReport
Name=First+Report+Tab
```

sReportPart

Syntax	Description	Mandatory?	Values
sReportPart	Indicates which specific part of the target report to open.	No	Name of the report part.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sReportPart=Part1
```

Note:

The `sReportPart` and `sPartContext` parameters are supported with the regular DHML viewer (`sViewer=html`). Instead of the first page of the report, the DHTML viewer displays the page and context containing the part with the part highlighted.

openDocument output parameters

This section details the openDocument output parameters that are available and gives examples on how to use the commands.

An openDocument URL is generally structured as follows:

```
http://<servername>:<port>/OpenDocument/opendoc/<platform
Specific>?<parameter1>&<parameter2>&...&<parameterN>
```

The exact syntax of the `<platformSpecific>` parameter depends on your implementation:

- For Java implementations, use `openDocument.jsp` in place of the `<platformSpecific>` parameter.

- For .NET implementations, use `opendocument.aspx` in place of the `<platformSpecific>` parameter.

Note:
Variables are denoted with angle brackets. You must substitute the proper value for these variables. For example, you must use the name of your server in place of `<servername>` where it is contained in the code samples below, and you must use your port number in place of `<port>`.

NAII

Syntax	Description	Mandatory?	Values
NAII	Forces the display of the prompt selection page. **Note:** Only supported by Web Intelligence documents.	No	• Y (prompt values that are passed with `lsS`, `lsM`, or `lsR` in the URL are applied and not displayed in the "Prompts" dialog box)

Note:
- `NAII=Y` raises the "Prompts" dialog box for any values not specified in the URL. Prompts created with default values are still displayed in the "Prompts" dialog box.
- If all prompt values are specified in the URL, the prompt window does not appear even if `NAII=Y` is specified.

Example:

This example assumes there are two prompts in the Web Intelligence document: `Year` and `Country`. `NAII=Y` forces the "Prompts" dialog box to appear and allows the user to specify a value for the `Country` prompt.

The `Year` prompt is already set to a value of `FY1999` in the URL using the `lsS` parameter and therefore is not prompted for.

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDo
cID=2010&lsSYear=FY1999&NAII=Y&sRefresh=Y
```

sOutputFormat

Syntax	Description	Mandatory?	Values
sOutputFormat	Indicates the format in which the target document is opened.	No	• H (HTML) • P (PDF) • E (Excel) • W (Word)

Note:
Defaults to HTML if this parameter is not specified.

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sOutputFormat=E
```

sViewer

Syntax	Description	Mandatory?	Values
sViewer	Indicates the viewer that is used to view the document.	No	• `html` • `part` (Crystal reports only) • `actx` (Crystal reports only) • `java` (Crystal reports only)

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sViewer=html
```

Example:

Note:
In order to use parameters in the URL with the ActiveX viewer, `:connect` must be appended to the URL, followed by the parameters.

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sPath=[Sales+Reports]&sDoc
Name=Sales+in+2003&sViewer=actx:connect&IsMCountry=[Thai
land],[Norway]
```

sWindow

Syntax	Description	Mandatory?	Values
sWindow	Indicates whether the target report will open in the current browser window or whether a new window will be launched.	No	• `Same` (current browser window) • `New` (new browser window is launched)

Example:

```
http://<servername>:<port>/OpenDocument/opendoc/<plat
formSpecific>?sType=wid&sDocName=SalesReport&iDo
cID=2010&sWindow=New
```

Contextual report linking

The openDocument feature allows you to create contextual links between Crystal reports, OLAP Intelligence reports and Web Intelligence documents. To do this, you construct a URL using the openDocument syntax and then insert the URL into a Crystal report, OLAP Intelligence report or Web Intelligence document.

Contextual report linking allows report designers to specify associations for documents residing in either a Crystal Reports environment (unmanaged) or a BusinessObjects Enterprise environment (managed). Once these associations are created, users follow the resulting navigational paths embedded in the linked documents.

This feature enables you to invoke Business Objects and Web Intelligence documents from Crystal Reports and vice versa. This feature relies on functionality that allows the user to do the following:

• Link Web Intelligence or Business Objects documents within the document domain.

• Link report objects in Crystal Reports.

To insert a link into a Crystal report

You can use openDocument to create hyperlinks in Crystal Reports. To create a link to another report or document, use the Hyperlink Tab of the field Format Editor.

1. Open the source report in Crystal Reports.
2. Right-click the field in which you want to insert the openDocument link and select **Format** from the shortcut menu.
3. In the Format Editor, select the **Hyperlink** tab.
4. Select **A website on the Internet**.
5. In the "Hyperlink information☐? area, leave the **Website Address** field empty and click the **Format Formula Editor** button.
6. Enter the openDocument link in the following format:

```
"http://[openDocument parameters]"+{Article_lookup.Fam
ily_name}
```

Where [openDocument parameters] are described in *openDocument parameter overview* , and the {Article_lookup.Family_name} enables the report to pass context-dependent data.

Note:
Test your link in a browser window before inserting it into a report or document.

7. Click **Save and Close** to leave the Formula Workshop.
8. Click **OK** in the Formula Editor to save the link.

To create a link to another report or document from an OLAP Intelligence report

You can use openDocument to create hyperlinks in OLAP Intelligence reports.

1. Open the source report in the OLAP Intelligence designer.
2. On the **Tools** menu, select **Action Manager** .
3. Click **New** to create a new action.
4. Enter an action name.
5. Select the area to which the action (the link) will apply.
6. Enter the openDocument link using the parameters and syntax described in this document.

Tip:
Test your link in a browser window before inserting it into a report or document.

7. Click **OK** to save the link.
8. Close the Action Manager dialog box.
9. Create an Analysis Button on the source report.
10. Right-click the Analysis Button.
11. In the drop-down menu, select **Properties** and then **Edit** .
12. Select **Launch an action** .
13. Select the action that corresponds to the openDocument link created in steps 3 through 6.
14. Click **OK** .

Creating links in Web Intelligence documents

You can define objects in a universe that allow Web Intelligence and BusinessObjects users to create reports whose returned values include links to other reports and documents.

When these reports are exported to the repository, users can click returned values displayed as hyperlinks to open another related document stored in the document domain of the repository.You create these links using the openDocument function in the definition of an object in Designer.

More information

For full information on creating links in Web Intelligence reports, see the *Building Reports Using the WebIntelligence Java Report Panel* guide.

You enable report linking in a universe by creating an object (the link object) whose returned values are the same as the values used as input to a prompt in an existing report (the target report).

The openDocument function allows the values for the link object to be returned as hyperlinks. When the user clicks the hyperlink, its value is used as the prompt input for the target report.

You can create documents using the link object as you would with any other object. Users can then click the hyperlinks to access more detailed documents related to the link object.

To create a link object, use the openDocument function in the object's Select statement. The Select statement for a link object follows this order:

```
'<a href="http://<servername>:<port>/OpenDocument/<plat
formSpecific>?sDocName=<document name>&sType=<document
type>&iDocID=<document id>&lsS<prompt message>='+object
 SELECT+'">'+object SELECT+'</a>'
```

The concatenation operator (+) applies for Microsoft Access databases. Use the operator appropriate to your target RDBMS.

For more details on the Select statement, creating link objects, and using link objects in InfoView, refer to the *Designer's Guide*.

Sending information to the Viewer analytic in a dashboard using openAnalytic

Using the openAnalytic syntax, you can send information from the following documents saved on the Central Management Server (CMS) to a Viewer analytic on a dashboard:

- Web Intelligence reports
- Crystal Reports
- Text analytic
- Desktop Intelligence reports
- Web page analytic

Sample syntax:

```
<a href='http://[WEB APPLICATION LOCATION]
aa-open-inlist.jsp?url=openAnalytic.jsp?
DocumentName=text+analytic&RepositoryType=C
&RepositoryName=PM&DocumentExt=afd
&DocumentId=AQ74dXHxW59HlHvZivNsypI&mode=full
' target='hiddenFrame'>[LINK NAME IN DASHBOARD]</a>
```

The key items in the sample are `aa-open-inlist.jsp` and `target='hid denframe'`.

1. In a text editor, copy and paste the sample syntax.
2. Replace [WEB APPLICATION LOCATION] with the web application location after http://.

For example: `http://<server>:<port>/PerformanceManage`
`ment/jsp`

3. Enter the correct information after the variables.

4. Replace [LINK NAME IN DASHBOARD] with the name of the link as you want it to appear.

5. Copy and paste the text in the following location:
   - For a Web Intelligence, Crystal Report or Desktop Intelligence report, copy the text in the cell of the query and then run a report.
   - For a Text analytic, go to the edit mode and paste the text in the "Enter text or HTML to display" text box and select **html**. Save the analytic in the public folders.
   - For a Web page analytic, go to the edit mode and in the "Content" tab paste the text in the "Enter the web page URL" text box and click **OK**. In the "Layout" tab, select from the "Display as" section **A link, so only the name is visible**.

6. In InfoView, go to **Dashboards** > **Create Corporate Dashboard**.

7. Enter the title, select a public folder, and click **OK**.

8. Click **Dashboards** > **Organize Corporate Dashboards**, and select your dashboard.

9. Click **Edit Dashboard**.

10. From the "Analytic Toolbox", expand the "Corporate Analytics" list to find your report, and drag it to the dashboard layout.

11. From the "Analytic Toolbox", expand the "New Analytic" list, and drag the "Viewer" analytic from the list to the dashboard layout.

12. Click **Save**, then **Exit Edit Mode**.

   Click on any linked item in the report and the destination appears in the viewer.

Individual Set Analysis analytics

Individual analysis delivers detailed historical information describing the evolution of an individual's relationship to the business. It can be used to profile customers, products and partners. Individual analysis supports discovery of pattern that occurs over a period of time, which can lead to new ideas for segmentation. It delivers not only individual-level attribute data, but also the information needed to understand relationship history.

For example, high value customer profiling can uncover patterns that foretell high value behavior within a set. An individual behavior can be a benchmark to a wider population within the set.

The "Individual" tab in Set Analysis shows samples of analytics that analyze the behavior of the selected individual in relation with one or more sets:

- Profiler
- Individual portrait
- Membership
  - Current membership
  - Membership history
  - Membership summary
- Sample metrics analytics for set analysis
  - Metric trends
  - Metrics summary
  - Set vs individual

Profiler

The Profiler analytic, available in Set Analysis, analyzes the individual level information at the membership and metric levels. Use Individual Profiler to create sets to profile your customers in ways that answer your business questions.

Individual customers can belong to more than one set, or interest group. For example, individual customers can belong to a specific age group, geographical location, or marital status.

Customers can be classified, analyzed and treated in different ways using set techniques. You can create broad or specific sets to categorize your customers in ways that are relevant to your business.

Individual portrait

Individual portrait is an Individual Set Analysis analytic that displays descriptive information on a selected individual. Reports and documents that provide additional details such as transaction history can be linked if they have been set up during configuration.

This analytic provides an interface to two kinds of information:

- Standard Dimension or Attribute Information
- Detail information, such as transaction histories or other contact

Note:
The fields displayed are dependent on the access granted to your profile by the system administrator.

Current membership

Current membership is a Individual Set Analysis analytic that displays the summary information of an individual set membership at a point in time. The point in time defaults to Today, or to the End Date for the selected time window if the Point Summary is visited after you visit a Period view (Summary or History).

Current membership helps you better interpret the information in the Summary View (for example, determining whether the Period information is consistent with historical behavior or indicative of a change).

Membership history

Membership history is an Individual Set Analysis analytic that displays the details of a membership history for a selected individual. Each row displays the episodes of membership for the selected individual within the selected time interval. Each line set represents a single episode of membership. The minimum length of any episode displayed for a given set is determined by its refresh frequency.

The time window ruler enables selection of a time window within which the history is displayed. The grain of the ruler determines whether the time ruler cursors work in days, weeks, months, quarters or years. Zoom buttons widen and reduce the date range displayed in the ruler. Varying the width of the time window can change the episode display; wider intervals widen the grain of the display.

If the interval between adjacent episodes is too short to display adequately due to the scale of the window width, then the character used to display the line is changed to signify the missing detail.

Sets are selectable via the standard tree list operation.

Membership history provides information about individual membership history over a period of time. Broken lines indicate that the individual has moved within a set.

Membership summary

Membership summary is an Individual Set Analysis analytic that displays the membership summary for an individual across time windows. This analytic similar to the Current Membership analytic, except that the time ruler is used to select an interval instead of a single date. The columns are also similarly defined but are restricted to the selected time window on the ruler.

Select the set to see membership episodes dates within the selected time window.

The following information is displayed:

- Presence: the total number of days present in the set since the first day of joining
- # Occurrence: total number of times the individual left and came back into the set in the selected time period
- Avg Duration: the average duration for which the individual was part of the set
- Presence %: percentage value of the present days in the set

Related Topics

• *Current membership*

Sample metrics analytics for set analysis

You can use the following "Individual Set" analytics to provide a powerful facility for observing the evolution of an individual with respect to one or more metrics over time:

- Metric trends
- Metrics summary
- Set vs individual

To facilitate meaningful interpretation of individual data, the "Summary" and "Trend" sub tabs support comparison of individual data with one or more metrics.

Grain selection in the "Metric" tab is based on the metric selected first.

Metrics summary

Metrics Summary analytic on the **Set AnalysisIndividual** tab displays the summary view of an individual's metric values. This analytic presents measure values for the individual based on a selected period as well as the closest-in-time metric values.

In Metric Summary, the calculation interval for the individual is the same as the Observation Time Interval.

The most recent refresh date for the metric value is displayed, as well as the metric value. The format of the date reveals the metric grain. To ensure that the individual's values are directly comparable to the metric values, select a grain and double click the Time Ruler to select a single period of that grain. Values of the selected metric of that grain are displayed in normal font. Otherwise, the values are shown in gray and the following criteria are used to select the best matching metric value:

• Which is the most recent, entirely contained sub-interval of the selected period?
• Which has the larger period (with data) that includes the greatest portion of the selected period?
• Which has the smaller period among the one or more smaller periods touching the selected interval that is the most recent (with data)?

A metric value is displayed in regular font if the selected time interval corresponds to the period for the metric and a value exists for it. Metric periods are single day, week, month, quarter or year.

Metric trends

Metric Trends analytic on the **Set AnalysisIndividual** tab is a sample of a Metric Trends analytic that displays the time series trend of metrics for a selected individual for a set time period. This analytic displays trends for Business Objects measures calculated for a selected individual over the selected time interval. These trends are for the selected individual metrics.

You can also select sets and see the trend of the individual with one or more sets.

When configuring Metric Trends, choose the metrics to display by selecting the set from the set tree list and the metric/transformation combinations from those that are available.

You can first choose which metrics to display and then, in a subsequent step, set the calculation, and display of the individual's values for the selected metric.

Set vs individual

Set vs. Individual is a sample Individual Set Analysis analytic that compares a metric trend line for an individual to that of one or more sets. This analytic allows you to compare a metric trend line for an individual to that of one or more sets. Values can be compared directly or trends can be compared using percentage change from origin.

Set vs. Individual helps you benchmark an individual to set averages over time, or alternatively, as might be useful in a B2B scenario, how much of set totals are accounted for by the selected individual.

Note:
Use % change from origin when comparing trends lines for sums or counts, when an average by individual metric is not available. Alternatively, view the raw values to analyze trends with respect to proportion of total metric value accounted for by the selected individual.

Set Analysis Terms

What is a broken stayer?

In the analysis of sets, a broken stayer is an individual who was present in a set at the end of the period of analysis and was present just before this period but who left within the period of analysis.

What is a continuous stayer?

In the analysis of sets, a continuous stayer is an individual who was present in a set at the end of the period of analysis and was present just before this period and who did not leave within the period of analysis.

What is a fast count?

A Set Analyzer Administrator creates fast counts in Set Architect. A fast count is an precalculated, aggregate action created in Set Analyzer that summarizes segment counts. Fast counts speed the navigation of object trees which, in turn, speeds the process of selecting items in a set.

The Set Analyzer Administrator can also schedule fast counts in Set Architect to occur at specified periods for better network performance. For more information on creating fast counts and object trees, see the Set Analyzer Administrator's Guide. For information on using object trees, see the Set Analyzer User's Guide.

Related Topics
• *What is an object tree?*

What is a joiner?

In the analysis of sets, a joiner is an individual who was present in a set in a given period but was not present in the prior period. The period of analysis here corresponds to the set refresh period. No metrics are required for this analysis to run.

What is a leaver?

A leaver is an individual who was not present in a set in a given period but was present in the prior period.

What is migration?

In Set Analysis, migration is movement of individual customers from one set to another.

What is an object tree?

In set analysis, object trees visualize data in the source database that users can use to drill down through to locate items to include in a set.

A Set Analyzer Administrator creates object trees in Set Analyzer after configuring the set repository with the appropriate metadata. It is normal to create at least one object tree. Set Analyzer users can then use these object trees to define the contents of their sets in the Set Analyzer VisualData view.

Set Analyzer users can also create their own custom object trees. The rows in the source tables have relationships, inherent in the data, that point to values that can be used for categorization. These values are seldom unique and are common to many records or rows in the table. These values can be used to group data together and are often related to other values in other columns in a hierarchical way.

A table can have many inherent hierarchies that indicate how these columns are related. Defining these hierarchies as object trees is a useful method of providing access to the table items to the Set Analyzer user who is not familiar with the structure of the data. In Set Analyzer, the object trees do not have to relate to a logical hierarchy, but can be constructed from any combination of suitable objects in the set repository.

What is retention?

In the analysis of sets, retention is the number of stayers as a percentage of the members at the end of the prior period.

Related Topics
• *What is a stayer?*

What is a sampling?

A sampling is a group of the population with specified information. Ideally you want to analyze a large sample frequently to get the most accurate estimates and the most up-to-date information.

In Process Analysis, larger samples make it easier to detect small shifts and make the control chart more sensitive in detecting changes without increasing the rate of false alarms.

Note:
Start the sampling when data is available. If no data exists, the sampling can take longer than necessary to generate.

What is segmentation?

In Set Analysis, segmentation is a way of partitioning a group of individuals, for example customers, prospects, or suppliers, into categories referred to as sets. Usually the groups are mutually exclusive, but they can overlap.

What is a stayer?

In the analysis of sets, a stayer is an individual who is present in a set in a given period as well as the prior period.

What is a subject?

In Set Analysis, the subject defines the central theme for the sets which are based on it. A set can contain data for only one subject; for example, customers, accounts, products, etc. In the context of a customer subject, you can define sets that include conditions based on the various tables and views that describe the customer entity.

What is turnover?

In the analysis of sets, turnover is the number of leavers as a percentage of the members at the end of the prior period.

Related Topics

• *What is a leaver?*

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Related Topics

• *What is a leaver?*

More Information

A

Information Resource	Location
SAP BusinessObjects product information	*http://www.sap.com*
SAP Help Portal	Select *http://help.sap.com* > SAP BusinessObjects. You can access the most up-to-date documentation covering all SAP BusinessObjects products and their deployment at the SAP Help Portal. You can download PDF versions or installable HTML libraries. Certain guides are stored on the SAP Service Marketplace and are not available from the SAP Help Portal. These guides are listed on the Help Portal accompanied by a link to the SAP Service Marketplace. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
SAP Service Marketplace	*http://service.sap.com/bosap-support* > Documentation • Installation guides: *https://service.sap.com/bosap-inst guides* • Release notes: *http://service.sap.com/releasenotes* The SAP Service Marketplace stores certain installation guides, upgrade and migration guides, deployment guides, release notes and Supported Platforms documents. Customers with a maintenance agreement have an authorized user ID to access this site. Contact your customer support representative to obtain an ID. If you are redirected to the SAP Service Marketplace from the SAP Help Portal, use the menu in the navigation pane on the left to locate the category containing the documentation you want to access.
Developer resources	*https://boc.sdn.sap.com/* *https://www.sdn.sap.com/irj/sdn/businessobjects-sdklibrary*

Information Resource	Location
SAP BusinessObjects articles on the SAP Community Network	*https://www.sdn.sap.com/irj/boc/businessobjects-articles* These articles were formerly known as technical papers.
Notes	*https://service.sap.com/notes* These notes were formerly known as Knowledge Base articles.
Forums on the SAP Community Network	*https://www.sdn.sap.com/irj/scn/forums*
Training	*http://www.sap.com/services/education* From traditional classroom learning to targeted e-learning seminars, we can offer a training package to suit your learning needs and preferred learning style.
Online customer support	*http://service.sap.com/bosap-support* The SAP Support Portal contains information about Customer Support programs and services. It also has links to a wide range of technical information and downloads. Customers with a maintenance agreement have an authorized user ID to access this site. To obtain an ID, contact your customer support representative.
Consulting	*http://www.sap.com/services/bysubject/businessobjectsconsulting* Consultants can accompany you from the initial analysis stage to the delivery of your deployment project. Expertise is available in topics such as relational and multidimensional databases, connectivity, database design tools, and customized embedding technology.

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