

The slide features a header with the CPA Business Intelligence logo on the left and the Office of the Comptroller of Public Accounts, Texas, seal on the right. The SAP BusinessObjects logo is centered. Below the header is a dark banner with the title 'Working with Documents & Reports' in white. The main content area contains instructional text and a 'View PDF Version' button. The background of the slide shows a stack of papers and a pen.

CPA Business Intelligence

**OFFICE OF THE COMPTROLLER
TEXAS**

SAP BusinessObjects™

Working with Documents & Reports

The following lesson contains screenshots of the actual BusinessObjects 4.1 application, with text and narration explaining how to use BusinessObjects to perform certain functions.

Please ensure that you are currently sitting at a computer that has sound playing capabilities and that the speakers are turned up to an acceptable volume.

When the narration has finished on a page, please press the [spacebar] to continue. If you would like to review a page, press the [backspace] key.

Note: If you prefer a PDF version of this tutorial please follow the link below.

[View PDF Version](#)

Page 1 – Working with Documents and Reports

The following lesson contains screenshots of the actual BusinessObjects 4.1 application, with text and narration explaining how to use BusinessObjects to perform certain functions.

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Texas Comptroller of
Public Accounts

Working with Documents & Reports2

Pin a Document for Future Viewing

If we need to refer to a specific document on a regular basis in BI launch pad, we can put a pin in the tab for that document so it opens automatically and is always easily accessible.

CPA Business Intelligence

Page 2 – Pin a Document for Future Viewing

If we need to refer to a specific document on a regular basis in BI launch pad, we can put a pin in the tab for that document so it opens automatically and is always easily accessible.

Page 2 – Pin a Document for Future Viewing

Working with Documents & Reports

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Pin a Document for Future Viewing

CPA Business Intelligence

Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View | New | Organize | Send | More Actions | Details

My Documents

Folders

Public Folders

Reports

Title

Type

Last Run

Instances

META Dictionary

Operational Semantic Dictionary

Table Sizing Report

Web Intelligence

Web Intelligence

Web Intelligence

3214

0

1

In this example, we'll pin the *META Dictionary* report, log off and log back on to BI launch pad to test the functionality, and then unpin the document.

Select and view the document.

System Configuration Wizard

Tax

Page 3 – Pin a Document for Future Viewing

In this example, we'll pin the *META Dictionary* report, log off and log back on to BI launch pad to test the functionality, and then unpin the document.

Select and view the document.

SAP Business Objects
Working with Documents & Reports

Texas Comptroller of Public Accounts

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Pin a Document for Future Viewing

CPA Business Intelligence

Welcome: ABC3774 | Applications | Help menu | Log off

Home | Documents | META Dictionary

Web Intelligence

Now that the document is open, we can pin the tab to the interface.

Click to pin the tab.

TAXPYR

Object Name (All values)

Y

META Dictionary

Application	Application	Application	Application	Application	Appl Custom	Data Source	Data Source	Data
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2

Author: rcha987

Creation date: May 17, 2016 11:08:03 AM GMT

Locale: English (United States)

Description:

Keywords:

Statistics

Last refresh date: May 17, 2016 11:04:45 AM GMT

Last modified: May 17, 2016 11:08:03 AM GMT

Last modified by: rcha987

Duration of previous refresh: 2

Document Options

Page 4 – Pin the Report

Now that the document is open, we can pin the tab to the interface.

Click to pin the tab.

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Working with Documents & Reports

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Pin a Document for Future Viewing

CPA Business Intelligence

Welcome: ABC3774 | Applications | Help menu | Log off

Home | Documents | META Dictionary

Web Intelligence

Document Summary

META Dictionary

General

Type: Web Intelligence document

Author: rcha987

Creation date: May 17, 2016 11:08:03 AM GMT

Locale: English (United States)

Description:

Keywords:

Statistics

Last refresh date: May 17, 2016 11:04:45 AM

Last modified: May 17, 2016 11:08:03 AM

Last modified by: rcha987

Duration of previous refresh: 2

TAXPYR

Object Name

META Dictionary

Application	Application	Application	Application	Application	Appl Custom	Data Source	Data Source	Data
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2


Now we can test that the tab has been pinned by logging off and then logging back on to BI launch pad.

Click Log Off.


Page 5 – Test the Pin – Log Off

Now we can test that the tab has been pinned by logging off and then logging back on to BI launch pad.

Click Log Off.



Working with Documents & Reports



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Pin a Document for Future Viewing

SAP BusinessObjects

BI launch pad

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

System: caupswap130:6400


User Name: ABC3774

Password: ●●●●●●

Authentication: Enterprise

Log On

Help

 CPA Business Intelligence

Select the
Password text
box to populate it.

Select **Log On**.

Page 6 – Test the Pin - Log On

Select the **Password** text box to populate it.

Select the **Log On** button.



Page 7 – Pinned Tab Appears

Note that the tab for the document automatically displays.

Select the tab to open the report.

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Working with Documents & Reports

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Pin a Document for Future Viewing

CPA Business Intelligence

Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents META Dictionary

Web Intelligence

Track

Drill

Filter Bar

Freeze

Outline

Reading

Design

Object Name (All values)

Y

When we no longer need easy access to the document, we can remove the pin.

Click to unpin the tab.

Author: rcha987

Creation date: May 17, 2016 11:08:03 AM GMT

Locale: English (United States)

Description:

Keywords:

Statistics

Last refresh date: May 17, 2016 11:04:45 AM GMT

Last modified: May 17, 2016 11:08:03 AM GMT

Last modified by: rcha987

Duration of previous refresh: 2

Document Options

META Dictionary

Application	Application	Application	Application	Application	Appl Custom	Data Source	Data Source	Data
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Syst	DBAPP	v1.0			64,002	DSNP	DB2

Page 8 – Unpin the Tab

When we no longer need easy access to the document, we can remove the pin.

Click to unpin the tab.

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Working with Documents & Reports

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Pin a Document for Future Viewing

CPA Business Intelligence

Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents META Dictionary

Web Intelligence | Track | Drill | Filter Bar | Freeze | Outline | Reading | Design

The tab is now unpinned.

General

Type: Web Intelligence document
Author: rcha987
Creation date: May 17, 2016 11:08:03 AM GMT
Locale: English (United States)
Description:
Keywords:

Statistics

Last refresh date: May 17, 2016 11:04:45 AM
Last modified: May 17, 2016 11:08:03 AM
Last modified by: rcha987
Duration of previous refresh: 2

Document Options

TAXPYR

Object Name (All values) Y

META Dictionary

Application	Application	Application	Application	Application	Appl Custom	Data Source	Data Source	Data
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2

Page 9 – The Tab Unpinned

Note: The tab is now unpinned.



Working with Documents & Reports

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Pin a Document for Future Viewing

This concludes this lesson.

Additional Tutorials

CPA Business Intelligence

Page 10 - Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

Additional Tutorials