

The slide features a white background with a teal and grey logo for 'CPA Business Intelligence' in the top left. In the top right is the official seal of the 'OFFICE OF THE COMPTROLLER TEXAS'. The center of the slide is dominated by the 'SAP BusinessObjects' logo, which includes a colorful globe icon. Below this, a dark grey horizontal band contains the title 'Working with Documents & Reports' in white, bold text. The main content area below the band contains three paragraphs of text and a 'View PDF Version' button. The bottom of the slide features a background image of a stack of books and a pen on a desk.

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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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

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SAP Business Objects Page 2 – Pin a Document for Future Viewing
 Working with Documents & Reports

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

Title	Type	Last Run	Instances
META Dictionary	Web Intelligence		3214
Operational Symantic Dictionary	Web Intelligence		0
Table Sizes Report	Web Intelligence		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.

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

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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

TAXPYR | Object Name (All values) | Y

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

Click to pin the tab.

META Dictionary

Application	Application	Application	Application	Application	Appl Custor	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 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 | TAXPYR | Object Name

Document Summary

Print

META Dictionary

General

Type: Web Intelligence document
Author: rcha987
Creation date: May 17, 2016 11:08:03 AM
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

META Dictionary

Application	Application	Application	Application	Application	Appl Custor	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

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.

Pin a Document for Future Viewing

The screenshot shows the SAP Business Objects BI launch pad login interface. The page title is "SAP BusinessObjects BI launch pad". Below the title, there is a prompt: "Enter your user information, and click 'Log On'. If you are unsure of your account information, contact your system administrator." The login form contains the following fields: "System:" with the value "ca:upswap130:6400", "User Name:" with the value "ABC3774", "Password:" with masked characters, and "Authentication:" with a dropdown menu set to "Enterprise". A "Log On" button is located below the form. At the bottom left, there is a logo for "CPA Business Intelligence" and a "Help" link at the bottom right. Two yellow callout boxes with blue arrows point to the "Password" field and the "Log On" button, with the text "Select the Password text box to populate it." and "Select Log On." respectively.

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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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.

META Dictionary

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64,002	CPA TAX Sys	DBAPP	v1.0			64,002	DSNP	DB2
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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

Page 8 – Unpin the Tab

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

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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

TAXPYR | Object Name (All values) | Y

The tab is now unpinned.

General

Type: Web Intelligence document
Author: rcha987
Creation date: May 17, 2016 11:08:03 AM
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
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Document Options

META Dictionary

Application	Application	Application	Application	Application	AppI Custor	Data Source	Data Source	Data
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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.

Pin a Document for Future Viewing

This concludes this lesson.

[Additional Tutorials](#)

Page 10 - Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

[Additional Tutorials](#)