

The slide features a header with the CPA Business Intelligence logo on the left and the Office of the Comptroller of Public Accounts of Texas logo on the right. The SAP BusinessObjects logo is centered in the upper half. Below this is a dark teal banner with the title "Working with Documents & Reports" in white. The main content area contains three paragraphs of text and a "View PDF Version" button. The background of the slide is a blurred image of a desk with a laptop, a pen, and a stack of papers.

CPA Business Intelligence

**OFFICE OF THE COMPTROLLER
PUBLIC ACCOUNTS
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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View History for a Document

Documents that have been scheduled have multiple instances – one for each time the document was generated. We can review the history of a document and open any of the instances to see a snapshot of the data for that particular time.

CONTINUE

Page 2 – View History for a Document

Documents that have been scheduled have multiple instances – one for each time the document was generated. We can review the history of a document and open any of the instances to see a snapshot of the data for that particular time.

SAP Business Objects
Working with Documents in BO 4.1

Texas Comptroller of Public Accounts

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications

Home Documents

View New Organize Send More Actions Details

My Documents

Folders

- Public Folders
 - Agency
 - Financial
 - HR
 - HR Generalist Shared
 - HR Manager
 - Manager Public Share
 - test
 - Public
- BITDev
- State Wide
- System Configuration Wizard
- Tax

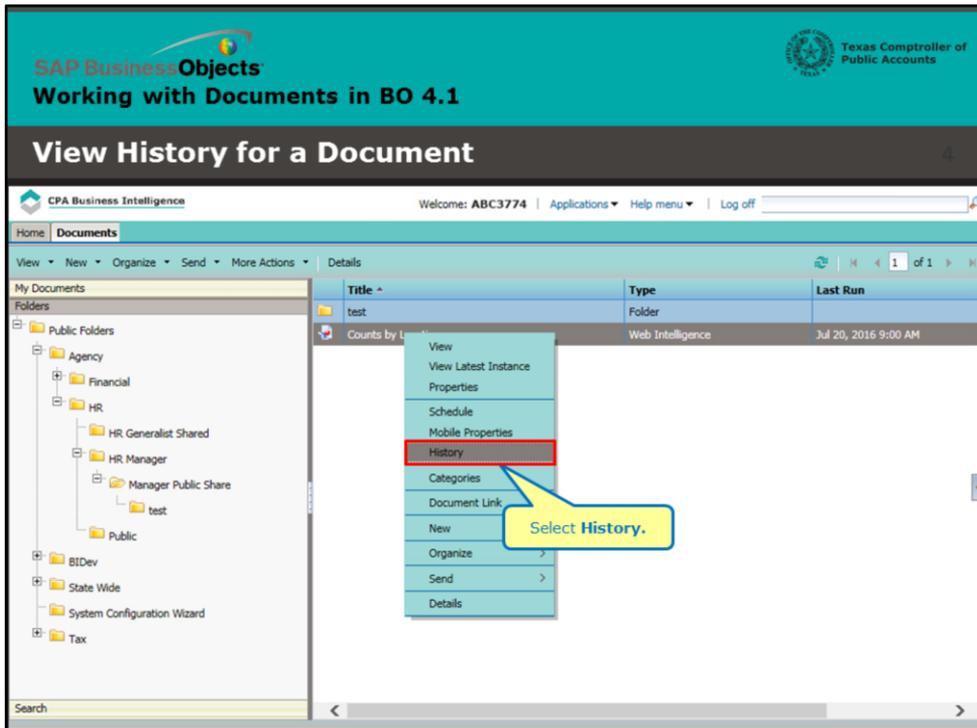
Title	Type	Last Run	Instances
test	Folder		
Counts by Location	Web Intelligence	Jul 20, 2016 10:00 AM	3

In this example, we'll view the history for the *Counts by Location* report. Note there are three instances of this report.

Select the document.

Page 3 – Select the Document

In this example, we'll view the history for the *Counts by Location* report. Note there are three instances of this report.



Page 4 – Select History

Select History from the document menu.

SAP Business Objects
Working with Documents in BO 4.1

Texas Comptroller of Public Accounts

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View History – Counts by Location

View | Organize | Send | More Actions

Instance Time	Title	Status	Created By	Type	Parameters
Jul 20, 2016 9:00 AM	Counts by Location	Success	mroc393	Web Intelligence	Austin;Dallas;Amarillo;For
Jul 20, 2016 8:44 AM	Counts by Location	Recurring	mroc393	Web Intelligence	Austin;Dallas;Amarillo;For
Jul 11, 2016 8:24 AM	Counts by Location	Success	rmoo150	Web Intelligence	Austin;Dallas;Amarillo;For

There are three instances here – one for the recurring schedule, and two completed instances from that schedule.

Select the most recent instance.

Search

Page 5 – Select a Document

There are three instances here – one for the recurring schedule, and two completed instances from that schedule.

Select the most recent instance.

SAP Business Objects
Working with Documents in BO 4.1

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents **Counts by Location** [Close]

Web Intelligence | [Print] | [Track] | [Drill]

Document Summary
 Counts by Location
 Click icon to add simple report filters

Click Close.

The document opens in its native viewer.
 Let's return to the document history.

General
 Type: Web Intelligence document
 Author: HR Bobby
 Creation date: May 11, 2016 11:02:33 AM
 Locale: English (United States)
 Description:
 Keywords:

Statistics
 Last refresh date: July 20, 2016 9:00:24 AM 05:00
 Last modified: July 20, 2016 9:00:26 AM 05:00
 Last modified by: mroc393
 Duration of previous refresh: 4

Company Count

City	Company Count
Amarillo	0
Austin	21
Christi	0
Dallas	0
Eastland	0
El Paso	0
Fort Worth	0
Antonio	0
Garland	0
Tyler	0
Waco	0

Agency Counts | Employee Counts

Page 6 – View and Close Document

The document opens in its native viewer.

Let's return to the document history.

SAP Business Objects
Working with Documents in BO 4.1

Texas Comptroller of Public Accounts

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View History – Counts by Location

View | Organize | Send | More Actions

When we no longer need an instance, we can delete it from the document history.

Instance Time	Title	Status	Created By	Type	Parameters
Jul 20, 2016 9:00 AM	Counts by Location	Success	mroc393	Web Intelligence	Austin;Dallas;Amarillo;For
Jul 20, 2016 8:44 AM	Counts by Location	Recurring	mroc393	Web Intelligence	Austin;Dallas;Amarillo;For
Jul 11, 2016 8:24 AM	Counts by Location	Success	rmoo150	Web Intelligence	Austin;Dallas;Amarillo;For

Select the report from the list.

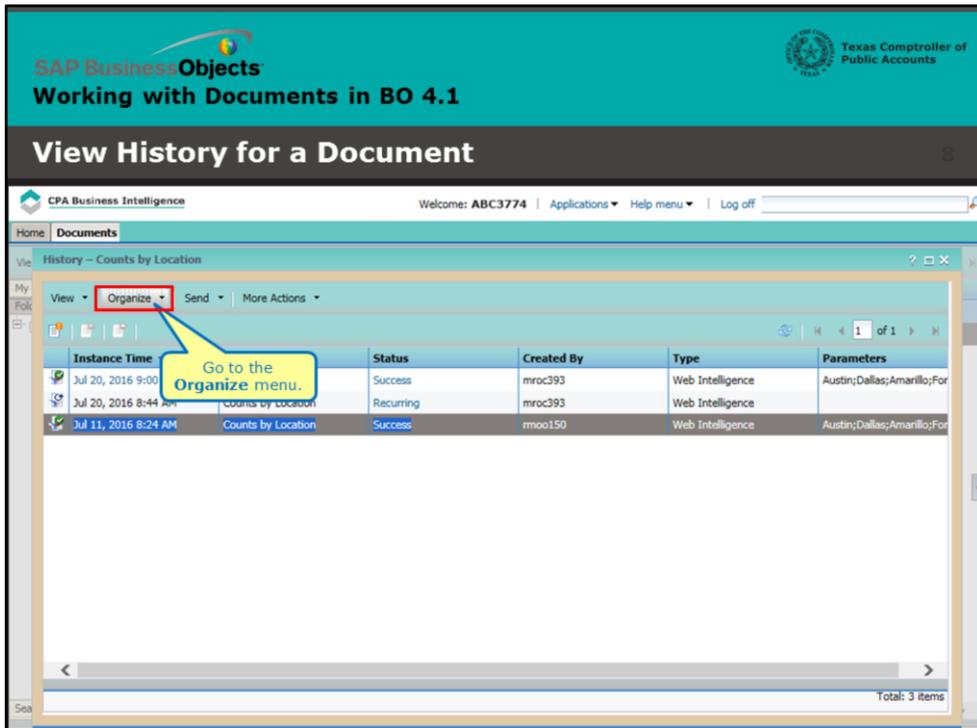
Duration of previous refresh: 4

Agency Counts | Employee Counts

Page 7– Delete an Instance of the Report

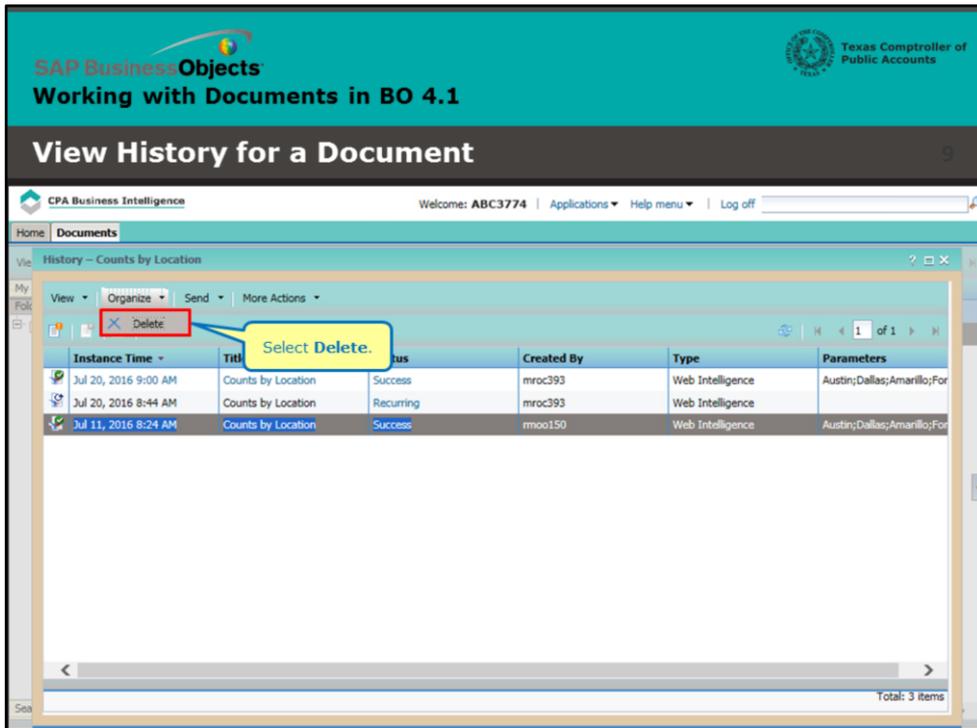
When we no longer need an instance, we can delete it from the document history.

Select the report from the list.



Page 8 – Delete an Instance of the Report (continued)

Go to the Organize menu.



Page 9 – Delete an Instance of the Report (continued)

Choose Delete from the menu.

SAP Business Objects
Working with Documents in BO 4.1

Texas Comptroller of Public Accounts

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View History – Counts by Location

View | Organize | Send | More Actions

Instance Time	Title	Status	Created By	Type	Parameters
Jul 20, 2016 9:00 AM	Counts by Location	Success	mroc393	Web Intelligence	Austin;Dallas;Amarillo;
Jul 20, 2016 8:44 AM	Counts by Location	Recurring	mroc393	Web Intelligence	Austin;Dallas;Amarillo;
Jul 11, 2016 8:24 AM	Counts by Location	Success	rmoo150	Web Intelligence	Austin;Dallas;Amarillo;

Delete
Are you sure you want to delete the selected items: Counts by Location

Select OK.

Page 10 – Delete an Instance of the Report (continued)

Select **OK**.

SAP Business Objects
Working with Documents in BO 4.1

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View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View History - Counts by Location

View | Organize | Send | More Actions

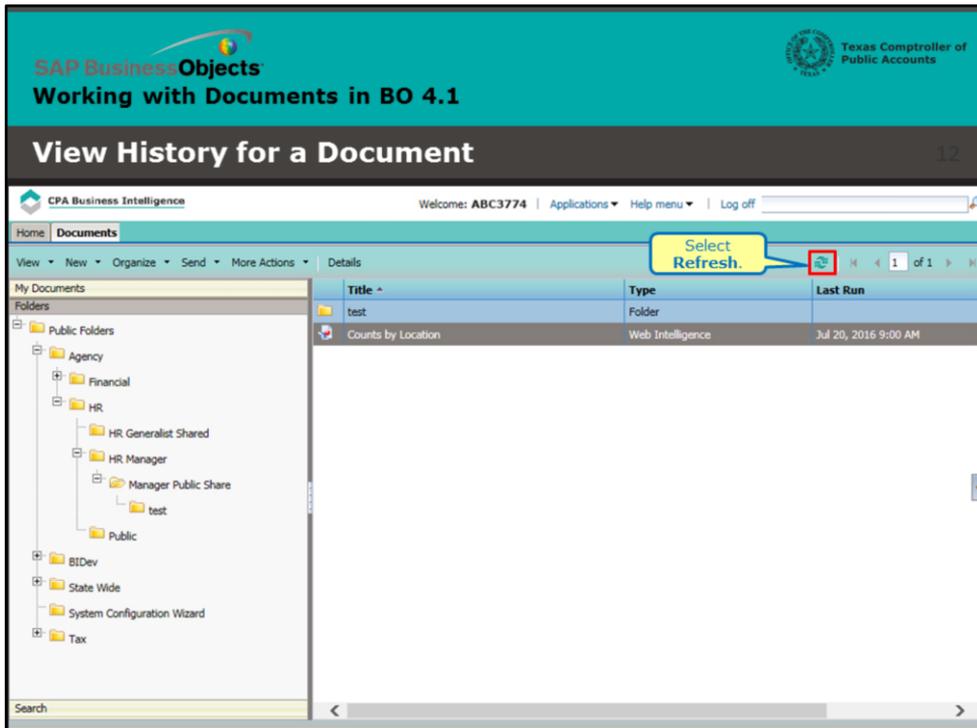
Instance Time	Title	Status	Created By	Type	Parameters
Jul 20, 2016 9:00 AM	Counts by Location	Success	mroc393	Web Intelligence	Austin;Dallas;Amarillo;For
Jul 20, 2016 8:44 AM	Counts by Location	Recurring	mroc393	Web Intelligence	

Total: 3 items

Click Close.

Page 11 – Delete an Instance of the Report (continued)

Close the History window.



Page 12 – Refresh the Window

Now select Refresh.

SAP Business Objects
Working with Documents in BO 4.1

Texas Comptroller of Public Accounts

View History for a Document

CPA Business Intelligence | Welcome: ABC3774 | Applications | Help menu | Log off

Home Documents

View | New | Organize | Send | More Actions | Details | 1 of 1

Title	Type	Last Run	Instances
test	Folder		
Counts by Location	Web Intelligence	Jul 20, 2016 9:00 AM	2

Note there are now only two instances of the report.

Page 13 – Fewer Instances

Note there are now only two instances of the report.

View History for a Document

This concludes this lesson.

[Additional Tutorials](#)

Page 14- Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

[Additional Tutorials](#)