

The slide features a header with the CPA Business Intelligence logo on the left and the Office of the Comptroller of Public Accounts, 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  
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 & 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 a Web Intelligence Document

When we open a Web Intelligence document in BI launch pad, it displays in its native viewer, which enables us to take advantage of interactive elements in the Reading view, such as the navigation map and the outline feature.



CPA Business Intelligence

### Page 2 – View a Web Intelligence Document

When we open a Web Intelligence document in BI launch pad, it displays in its native viewer, which enables us to take advantage of interactive elements in the Reading view, such as the navigation map and the outline feature.

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Working with Documents & Reports

Page 3 – Select the Document

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### View a Web Intelligence 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
Tax Shared	Folder		
Simple Tax Example	Web Intelligence		0

My Documents

Folders

- Public Folders
  - Agency
  - BITDev
  - State Wide
  - System Configuration Wizard
  - Tax
    - Tax Shared

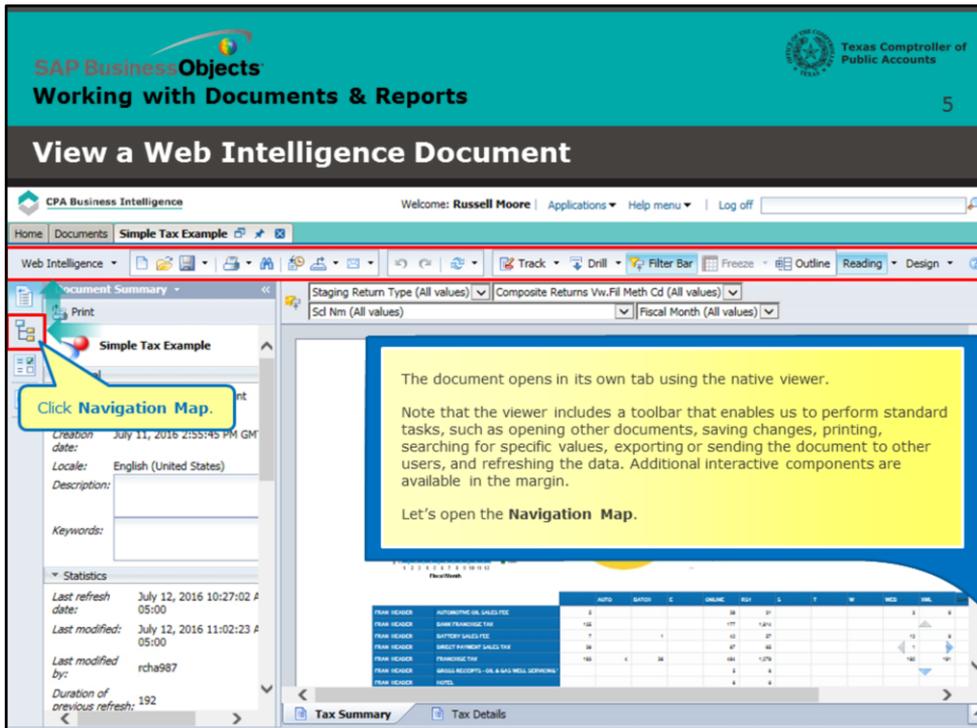
Select and view the document.

Let's view the *Simple Tax Example* report, navigate between sections, modify the prompt for the query, and create a simple report filter.

### Page 3 – Select the Document

Let's view the Simple Tax Example Report, navigate between sections, modify the prompt for the query, and create a simple report filter.

Select and view the document.



## Page 4 – The Document Viewer Toolbar

The document opens in its own tab using the native viewer.

Note that the viewer includes a toolbar that enables us to perform standard tasks, such as opening other documents, saving changes, printing, searching for specific values, exporting or sending the document to other users, and refreshing the data. Additional interactive components are available in the margin.

Let's open the Navigation Map.

Select the Navigation Map icon in the left margin toolbar.

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Working with Documents & Reports

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document

Russell Moore | Applications | Help menu | Log off

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

Staging Return Type (All values) | Composite Returns Vw.Fil Meth Cd (All values)  
Scd Nm (All values) | Fiscal Month (All values)

Navigation Map

- Simple Tax Example
  - Tax Summary
  - Tax Details

Click the User Prompt Input.

Tax Summary

Bar Chart: Tax Summary (Y-axis: Amount, X-axis: Fiscal Month)

Pie Chart: Composite Rate

TRAX HEADER	AMOUNT	DATE	C	UNAME	REV	S	T	W	REV	THL
TRAX HEADER	152				38	21				
TRAX HEADER	152				177	1474				
TRAX HEADER	7				14	27				
TRAX HEADER	38				47	82				
TRAX HEADER	152				384	1279				
TRAX HEADER	0				2	4				
TRAX HEADER	4				4	4				

Tax Summary | Tax Details

## Page 5 – The Navigation Map

We can use the Navigation Map to navigate to specific elements in the document.

Let's drill down further via the **User Prompt Input**.

Select the **User Prompt Input** tool in the left margin toolbar.

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## View a Web Intelligence Document

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Home Documents Simple Tax Example

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

User Prompt Input

Advanced Run

Enter value(s) for Cal Year (optional)  
2013  
--Show List Of Values--

Enter value(s) for Scl Nm (optional)  
--Show List Of Values--

Enter value(s) for Staging Return Type (optional)  
FRAN\_HEADER  
GWRETURN  
RTRN\_AUDBAS  
--Show List Of Values--

Staging Return Type (All values) | Composite Returns Vw.Fil Meth Cd (All values)  
Scl Nm (All values) | Fiscal Month (All values)

Click to expand lists.

We can now expand the lists of values for each element.

Tax Summary

Flour/Flour

Composite Rate

	J	F	M	A	M	J	J	A	S	O	N	D	Y
FRAN_HEADER AUTOMOTIVE OIL SALES TAX	1												
FRAN_HEADER BANK FRANCHISE TAX	1												
FRAN_HEADER BATTERY SALES TAX	1												
FRAN_HEADER BULKY FURNACE SALES TAX	1												
FRAN_HEADER FRANCHISE TAX	1												
FRAN_HEADER GROSS RECEIPTS - OIL & GAS WELL SERVICES	1												
FRAN_HEADER HOTEL	1												

### Page 6 – User Prompt Input Lists

We can now expand the lists of values for each element.

Select and expand the lists.

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## View a Web Intelligence Document

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Home Documents Simple Tax Example

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

User Prompt Input

Advanced Run

Enter value(s) for Cal Year (optional)

1987  
2005  
2035  
2043  
2044  
1989  
1990  
1998

Enter value(s) for Scl Nm (optional)

911 EMERGENCY SERVICE FEE  
911 EQUALIZATION SURCHARGE  
911 PREPAID WIRELESS SERVICE FEE  
911 WIRELESS EMERGENCY SERVICE  
AGRICULTURAL AND TIMBER, EXEMPT  
ALCOHOLIC BEVERAGE DISTRIBUTION  
ARBITRATION HEARINGS

Enter value(s) for Staging Return Type

SORETURN  
FRAN\_HEADER  
GWRETURN  
IFTA\_RTRN  
OSRETURN  
RETURN

Staging Return Type (All values) Composite Returns Vw.Fil Meth Cd (All values)  
Scl Nm (All values) Fiscal Month (All values)

We'll select only the parameters we wish to include in our report.

Tax Summary

Bar Chart: Tax Summary (Y-axis: Amount, X-axis: Fiscal Month)

Pie Chart: Composite Rate

FRAN_HEADER	AUTOMATIC OIL SALES FEE	AMOUNT	DATE	C	UNAME	REV	S	T	IN	REV	THL
FRAN_HEADER	BANK FRANCHISE TAX	120				177		1474			
FRAN_HEADER	SAFTOY SALES FEE	7				10		27			
FRAN_HEADER	WRECK SERVICE SALES TAX	38				47		82			
FRAN_HEADER	FRANCHISE TAX	100		38		104		1278			
FRAN_HEADER	GRASS RECEIPTS - OIL & GAS WELL SERVICES					2		4			
FRAN_HEADER	NOTES					4		0			

Tax Summary Tax Details

### Page 7 – Select Parameters from the Lists

We'll select only the parameters we wish to include in our report.

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## View a Web Intelligence Document

Then we'll execute the query with the new parameters.

ABC3774 | Applications | Help menu | Log off

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

Staging Return Type (All values) | Composite Returns Vw.Fil Meth Cd (All values)  
ScI Nm (All values) | Fiscal Month (All values)

User Prompt Input -> Advanced Run

Enter value(s) for Calendar Year (optional)  
1987  
2005  
2035  
2043  
2044  
1989  
1990  
1998

Enter value(s) for ScI Nm (optional)  
911 EMERGENCY SERVICE FEE  
911 EQUALIZATION SURCHARGE  
911 PREPAID WIRELESS SERVICE FEE  
911 WIRELESS EMERGENCY SERVICE  
AGRICULTURAL AND TIMBER, EXEMPT  
ALCOHOLIC BEVERAGE DISTRIBUTION  
ARBITRATION HEARINGS

Enter value(s) for Staging Return Type  
BORETURN  
FRAN\_HEADER  
GWRETURN  
IFTA\_RTRN  
OSRETURN  
RETURN

Click Run.

### Tax Summary

	JUN15	JUL15	AUG15	SEP15	OCT15	NOV15	DEC15	JAN16	FEB16	MAR16	APR16	MAY16	JUN16	JUL16	AUG16	SEP16	OCT16	NOV16	DEC16	
FRAN_HEADER AUTOMOTIVE OIL SALES FEE	1																			
FRAN_HEADER BANK FINANCIAL TAX	152																			
FRAN_HEADER BATTERY SALES FEE	1																			
FRAN_HEADER BULKY FURNACE SALES TAX	38																			
FRAN_HEADER FURNACE TAX	150	1	38																	
FRAN_HEADER GROSS RECEIPTS - OIL & GAS WELL SERVICES																				
FRAN_HEADER HOTEL																				

Tax Summary | Tax Details

## Page 8 – Execute the Query

Then we'll execute the query with the new parameters.

Select the Run icon in the User Prompt Input window.

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## View a Web Intelligence Document

A new Tax Summary is generated accordingly.

We can also take advantage of additional features in the toolbar such as tracking changes, drilling down into additional layers of data, adding simple report filters, and folding and unfolding sections of the document, depending on how the document has been set up.

Let's add a simple report filter to show only the 3<sup>rd</sup> Fiscal Month's data.

Click Filter Bar.

The screenshot displays the SAP Business Objects Web Intelligence interface. On the left, there is a navigation pane with a tree view showing various report components like '911 EMERGENCY SERVICE FEE' and '911 WIRELESS EMERGENCY SERVICE'. The main area shows a 'Tax Summary' report with a bar chart of 'Return Count' by 'Fiscal Month' and a pie chart of 'Composite Rtn...'. A callout box points to the 'Filter Bar' button in the top toolbar.

## Page 9 – View New Tax Summary Report

A new Tax Summary is generated accordingly.

We can also take advantage of additional features in the toolbar such as tracking changes, drilling down into additional layers of data, adding simple report filters, and folding and unfolding sections of the document, depending on how the document has been set up.

Let's add a simple report filter to show only the 3<sup>rd</sup> Fiscal Month's data.

Select **Filter Bar** from the top menu.

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## View a Web Intelligence Document

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

Home Documents Simple Tax Example

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

User Prompt Input

Advanced Run

Enter value(s) for Cal Year (optional)

1987  
2005  
2035  
2043  
2044  
1989  
1990  
1998

Enter value(s) for Scl Nm (optional)

911 EMERGENCY SERVICE FEE  
911 EQUALIZATION SURCHARGE  
911 PREPAID WIRELESS SERVICE FEE  
911 WIRELESS EMERGENCY SERVICE  
AGRICULTURAL AND TIMBER, EXEMPT  
ALCOHOLIC BEVERAGE DISTRIBUTION  
ARBITRATION HEARINGS

Enter value(s) for Staging Return Type

BORETURN  
FRAN\_HEADER  
GWRETURN  
IPTA\_RTRN  
OSRETURN

Staging Return Type (All values) | Composite Returns Vw.Fil Meth Cd (All values)

Scl Nm (All values) | Fiscal Month (All values)

Click Fiscal Month.

### Tax Summary

Return Count

Composite Retu...

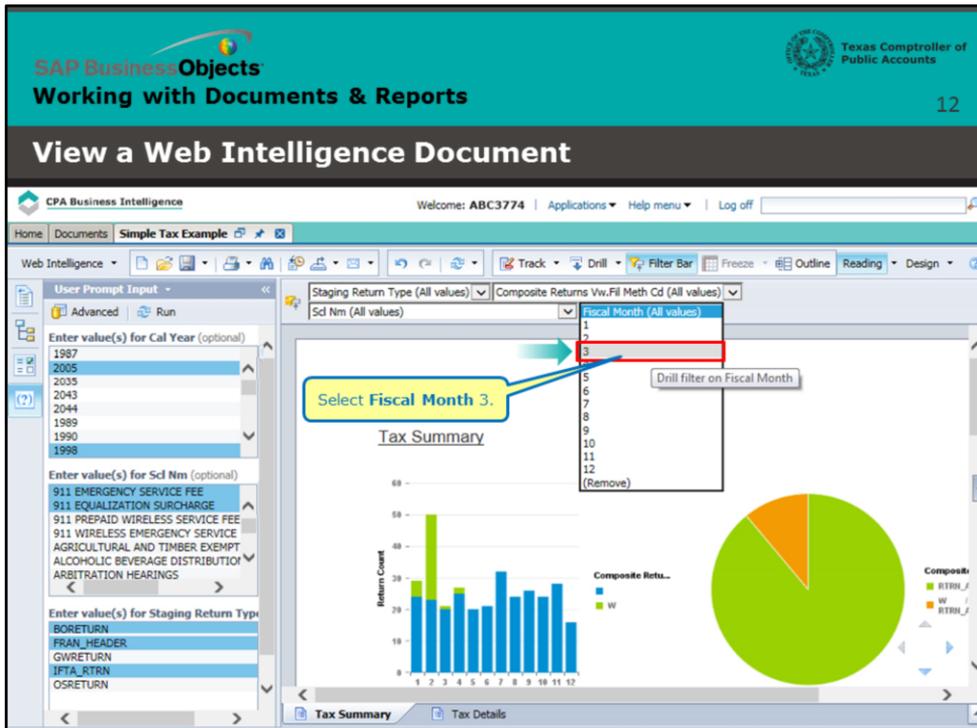
RTRN\_/  
W

RTRN\_/  
W

Tax Summary | Tax Details

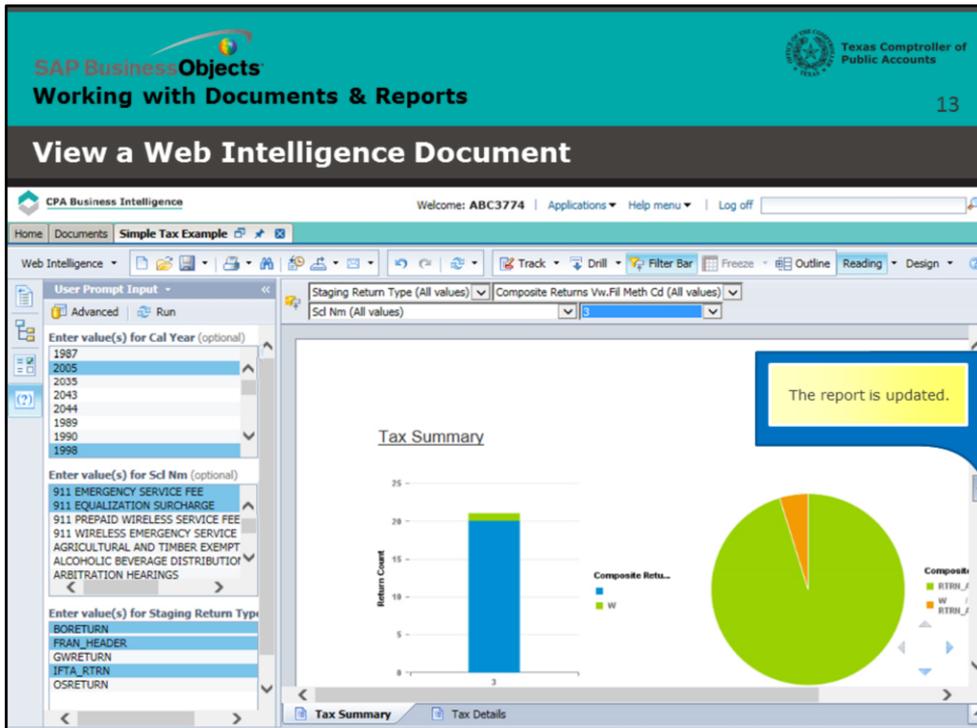
## Page 10 – Narrow the Results

Select **Fiscal Month**.



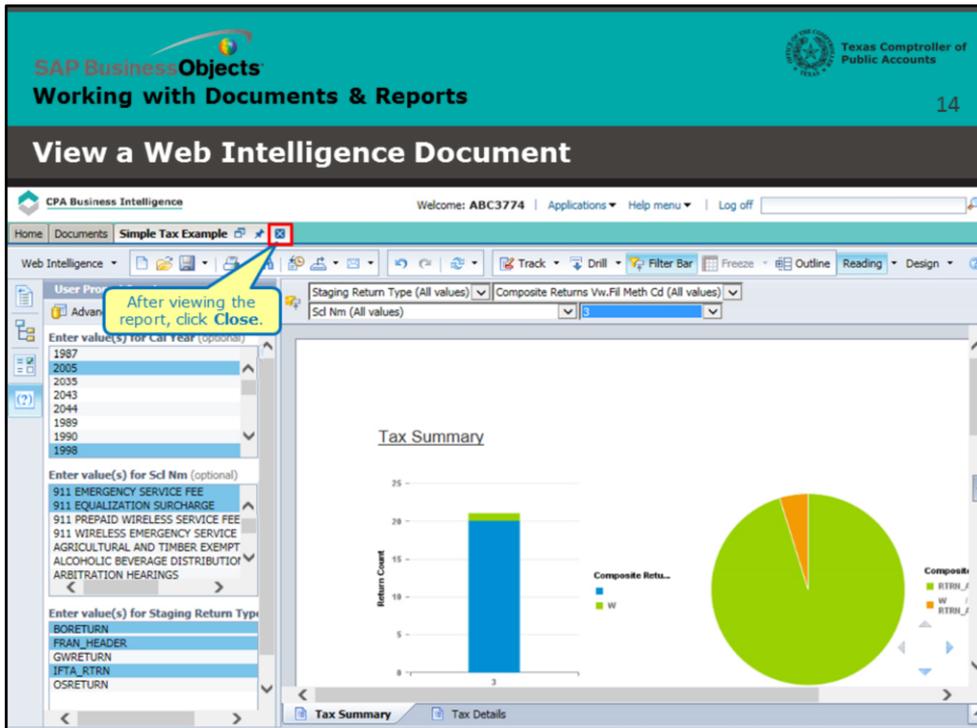
## Page 11 – Select Fiscal Month

Select Fiscal Month 3.



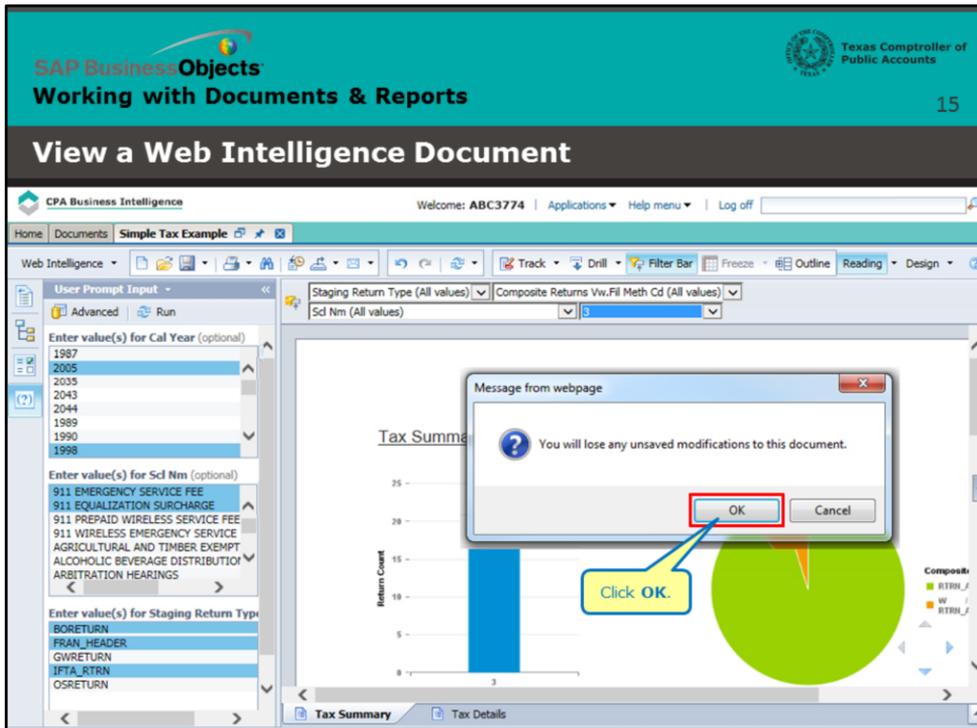
## Page 12 – View Updated Report

The report is updated.



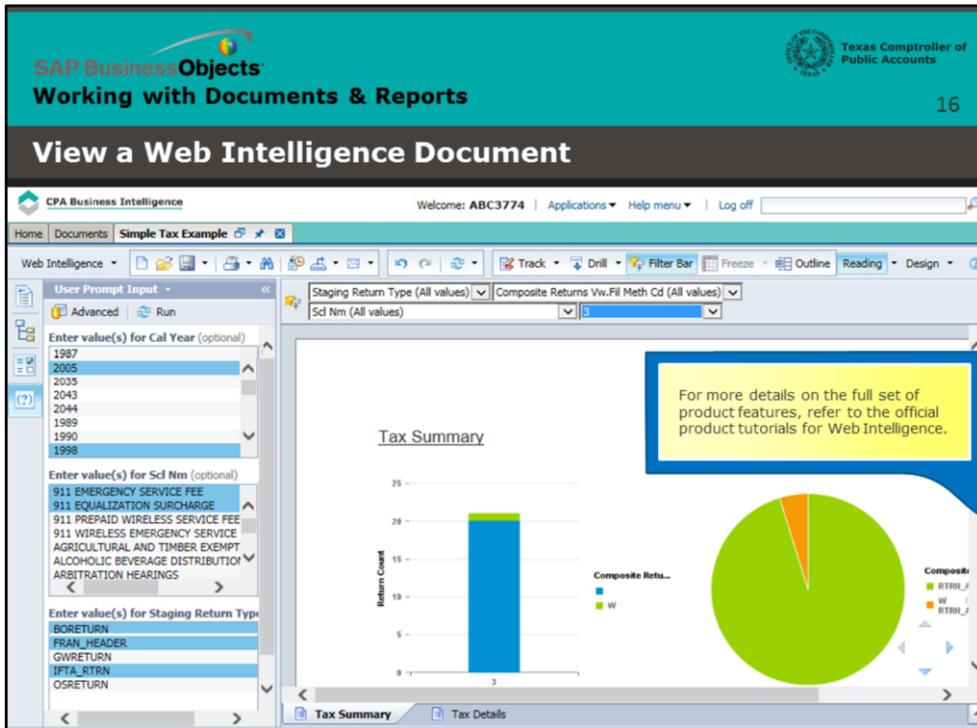
## Page 13 – Close the Report

Once we're done viewing the document, we can close the Report tab.



## Page 14 – Close Report without Saving

Select OK.



## Page 15 – Refer to Other Web Intelligence Tutorials

For more details on the full set of product features, refer to the official product tutorials for Web Intelligence.

## View a Web Intelligence Document

This concludes this lesson.

[Additional Tutorials](#)



### Page 16- Conclusion

This concludes this lesson.

For more BusinessObjects 4.1 tutorials, select the link below.

[Additional Tutorials](#)