Business Objects-Basic How To:
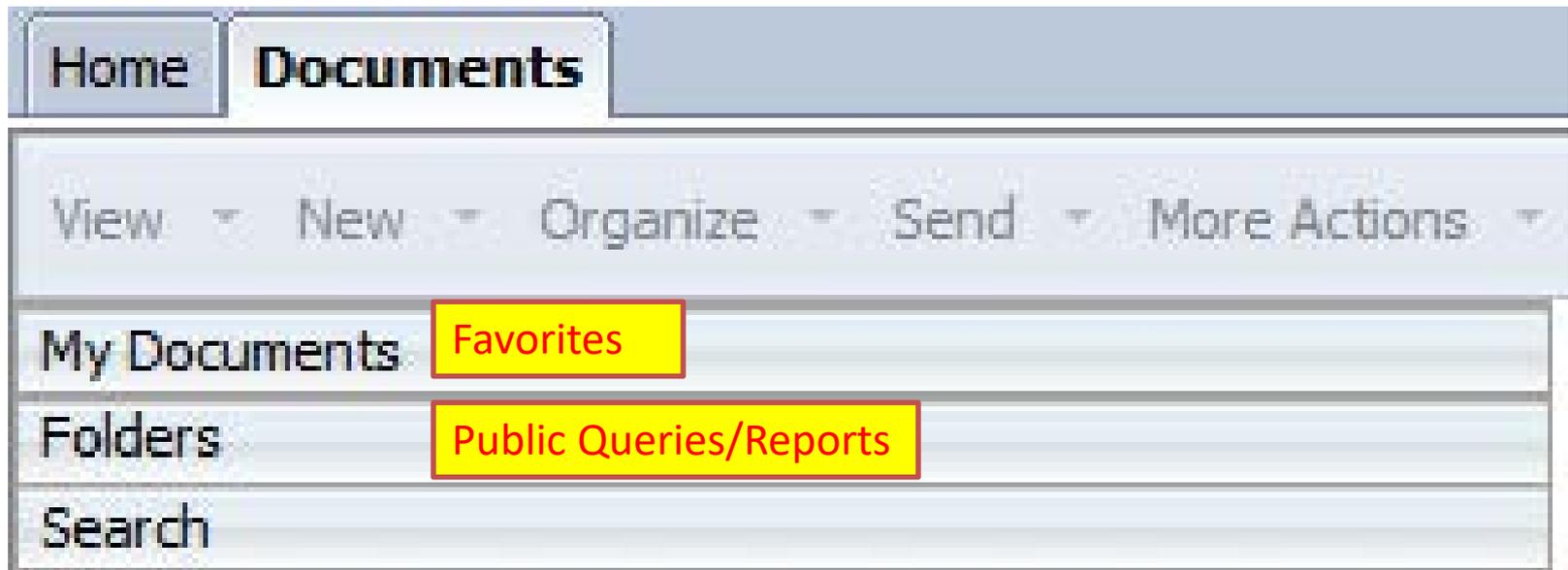
1. Navigation
2. Change Preferences
3. Create Shortcuts
4. Copy Reports
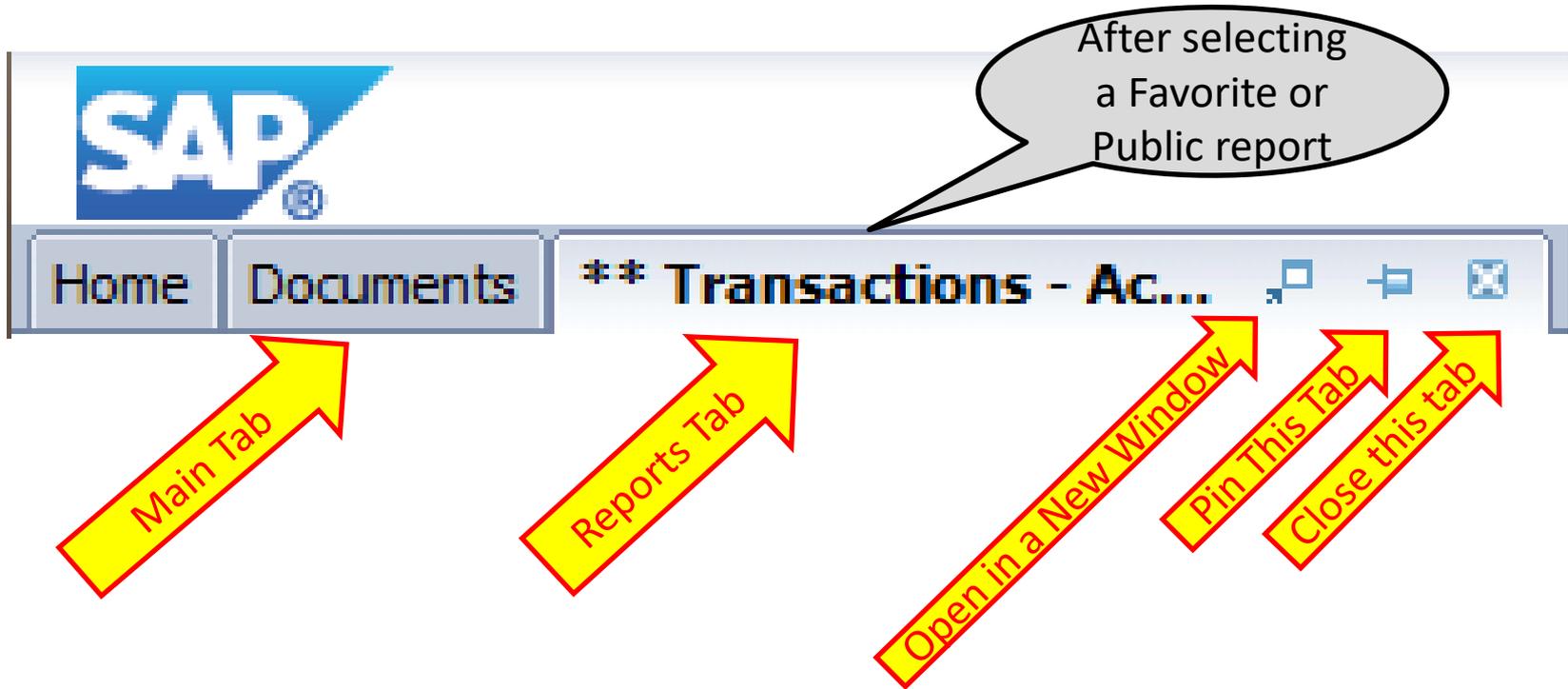
1. Navigation
Documents Tab - Three Bars
Left Ribbon

Navigation Tabs

Navigation of Report Toolbar

Task	Icon	Description
Create documents		Depending on rights given by the BI administrator, a user can create a document based on a universe or that does not require access to a data source.
Open documents		A user can open documents in the personal folder or from corporate folders to which access has been granted by the BI administrator.
Save documents		A user can save a document to the personal folder or to a corporate folder to which access has been granted by the BI administrator.
Print documents		A user can print a document.
Search for a document		A user can search for a document in the personal folder or in corporate folders to which access has been granted by the BI administrator.
View the document history		A user can view the history of the document.
Export documents or one of its reports		A user can export a document or one of its reports in a variety of formats.
Send a document		A user can send a document or one of its reports in a variety of formats.
Undo or redo an action		A user has control over an action performed on a report in a document.
Refresh a document		A user can refresh a document so that the latest data appears.
Access help		A user can access the documentation help for Web Intelligence.
Track changes in a document	Track	A user can activate the change tracking for a document.
Drill on data	Drill	A user can activate drilling in the document on any objects with more than one level.
Filter document data	Filter Bar	A user can use a simple filter to limit the data shown based on types of data shown in the report.
Freeze table headers, rows and columns	Freeze	A user can freeze headers, rows and columns in tables to keep them displayed while scrolling data.
Show document outline	Outline	A user can show the outline of a document and its reports, if one exists.

Icons Bottom of Page

Task	Icon	Description
Toggle between pages	Page 1 of 1+	A user can move forward or backwards one page, enter a specific page number, or toggle to the beginning or end of a report in a document.
Toggle between page displays		A user can toggle easily and quickly between Quick Display and Page mode.
Zoom in a report	100%	A user can zoom in and out on a displayed report.

Navigation: Reading and Design Buttons (top right)
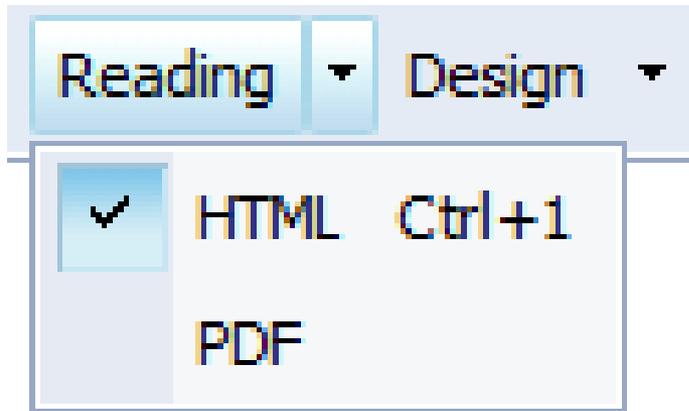
Reading - Report output viewed in HTML (default) or PDF
Design – Allows users to modify a report

2. Change Preferences

Preferences – Craig Larson

Preferences
- General
- Change Enterprise Password
- Locales and Time Zone
- Analysis edition for OLAP
- Web Intelligence
- BI workspaces
- Crystal Reports

General

☐ **Use Default Settings (Administrator defined)**

Set BI launch pad start page:

○ **Home tab**
  ◉ Default Home tab
  ○ Select Home tab: [Browse Home Tab]

  [_____]

◉ **Documents tab**
  ○ **My Documents**
    ◉ My Favorites
    ○ Personal Categories
    ○ My Inbox

OR

  ◉ **Folders**
    ○ Public Folders
    ◉ Select Public Folder: [Browse Folder]
    [Transactions_____]

1. Click box to uncheck Default Settings

2. Choose Your Start Page

3. Save changes you make!

3. Create Shortcuts

- The Advantage of Shortcuts is updates to public reports will be updated in report shortcuts

- Users can save shortcuts to public reports in their Favorites Folder in two ways:
  - Right click on the report
    - Select Organize > Create Shortcut in My Favorites or
    - Select Organize > Copy Shortcut
      - Then Right click on your "My Favorites" folder
      - Select Organize > Paste

4. Copy Reports

- The Advantage of Copied Reports is users can modify the copied report in their Favorites folder

- Users can copy reports to their Favorites Folder in two ways:

  1. Open the report and select "Save As" from the report menu bar

      -Or-

  2. Right click on the report
     - Select Organize > Copy
     - Then right click on your "My Favorites" folder
     - Select Organize > Paste

If you have questions contact your university accountant.