

Business Object XI – Launch Pad

Lesson 1: Introduction to
Launch pad

Lesson Objectives

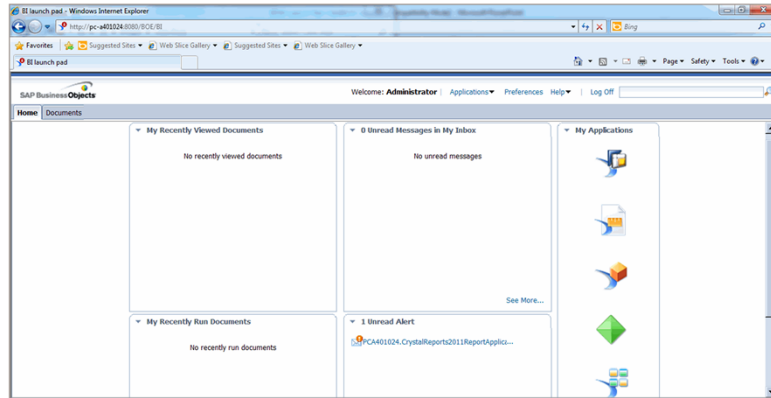
- Navigation through Web Intelligence and Launch pad
- Steps to:
 - Setup general preferences for WebI documents
 - Organise documents
 - Save, copy and move WebI documents
 - Delete WebI document
 - Manage documents



1.0: Introduction to BI launch pad

What is BI launch pad?

- BI launch pad (formerly known as InfoView) is the standard web portal for users of the SAP BusinessObjects Business Intelligence (BI) platform.



Introduction to BI launch pad :

What is BI launch pad ?

BI platform includes BI launch pad, a web application that acts as a window to business information about your company. In BI launch pad, you can perform the following tasks:

- Access Crystal reports, Web Intelligence documents, and other objects and organize them to suit your needs
- View information in a web browser, export it to other business applications (such as Microsoft Excel and SAP StreamWork), and save it to a specified location
- Use analytic tools to explore the business information in detail

The features of BI launch pad vary by content type, and various applications are available in BI launch pad, if you have the appropriate licenses.

1.0: Introduction to InfoView

Login

■ User Identification and Authentication:

The screenshot shows the SAP BusinessObjects login page. At the top right is the SAP BusinessObjects logo. Below it, the text 'Log On to BI launch pad' is displayed, followed by a 'Help' link. A message states: 'Enter your user information and click Log On. (If you are unsure of your account information, contact your system administrator.)'. Below this message is a form with three input fields: 'System:' with the value 'PC-A401024:6400', 'User Name:' with the value 'Administrator', and 'Password:' with masked characters. A 'Log On' button is located at the bottom right of the form.

Introduction to BI launch pad:

BI launch pad Login:

- The System Administrator has the rights to create users to connect to the Corporate Repository. Depending on the privileges set for a user, the available options differ.
- Launch the BI launch pad instance by using the link provided to you by trainer. Use the login credential provided by your trainer.



1.0: Introduction to BI Launch Pad

Web Intelligence

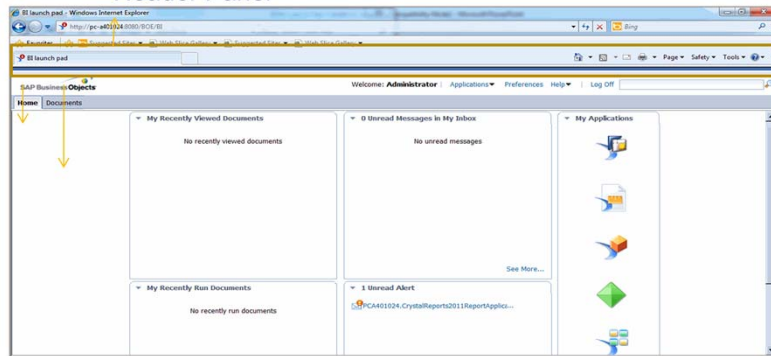
- BI Launch pad has been designed to give you access to the content and Applications in the SAP Business Objects system through an interface that consists of A Header Panel and two main tabs : Home and Documents.
- BI Launch pad displays the Home tab by default when a user logs in.

1.0: Introduction to BI Launch Pad

Header Panel

- The Header Panel at the top of screen displays the current user logged in and gives access to applications, preferences and help
- The Header panel remains visible in the window regardless of the other tabs or applications selected from the BI Launch pad

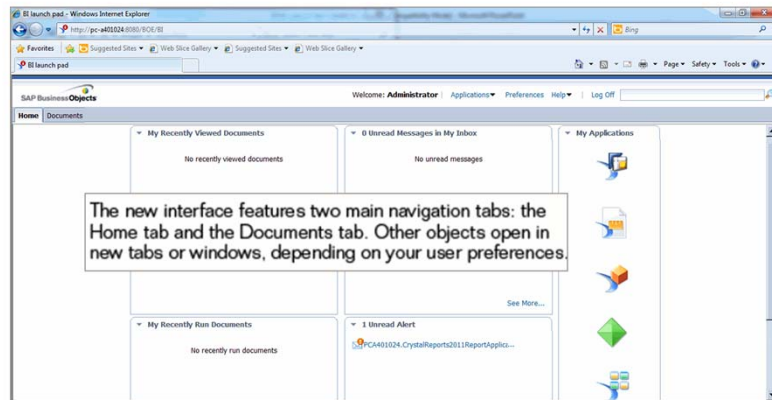
Header Panel



1.0: Introduction to BI Launch pad

Home Page

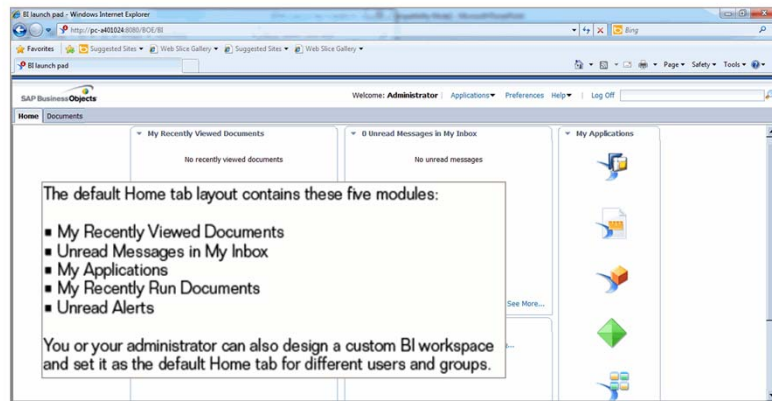
- The Home page for BI launch pad comprises of the following areas:



1.0: Introduction to BI Launch pad

Home Tab

- The default Home tab is designed to display the documents, content, and features of SAP Business Objects that you work with the most

**Introduction to BI launchpad:**

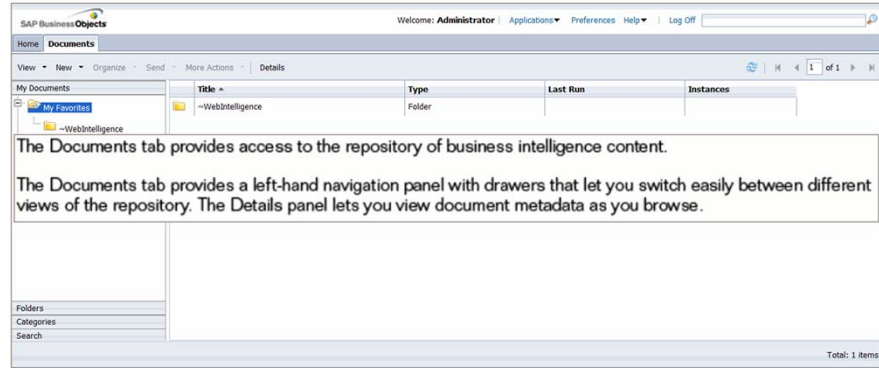
The Home tab contains the following default modules, which you use to manage documents and BI launch pad features:

- "My Recently Viewed Documents": lists the last 10 documents that you viewed, sorted by view date, with the most recently viewed document at the top
- "Unread Messages in My Inbox": lists the 10 most recent unread messages in your BI Inbox
- "My Recently Run Documents": lists the last 10 documents in the repository that you scheduled or ran, with the status of each document instance
- "Unread Alerts": shows the last 10 unread alert notifications
- "My Applications": provides quick access to the applications in BI launch pad

1.0: Introduction to BI Launch pad

Documents Tab

- The documents tab is designed to display, organize, and interact with all of your documents and BI content.

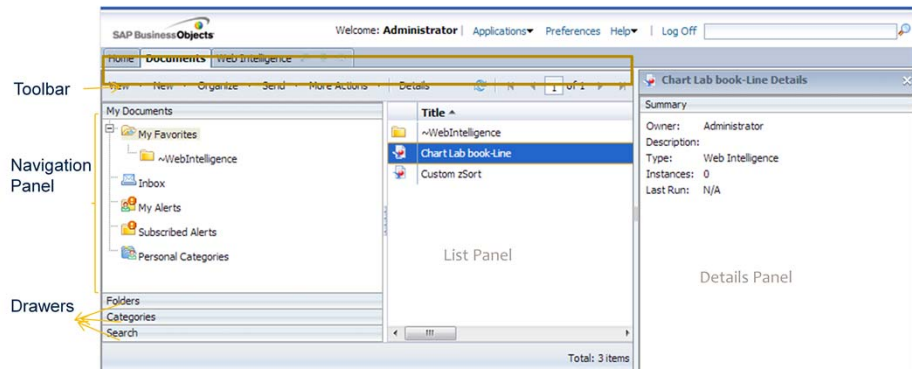


Use the Documents tab to view and manage objects in the repository.

1.0: Introduction to BI Launch pad

Documents Tab

- The documents tab is made of the following component
 - Toolbar
 - Navigation Panel
 - Drawers



• **Toolbar** : The toolbar acts as your main menu within the Documents Tab. The options that are enabled within the toolbar depend on whether a folder, category, document, or object is currently selected.

• **Navigation Panel**: The Navigation panel helps you navigate through a folder or category structure, as well as to search to locate individual documents stored anywhere in the SAP Business Objects system.

• **Drawers**: The drawers allow you to organize document content into MyDocuments, Folders or Categories

• **List Panel**: The List panel displays the document contents of the currently selected folder or category

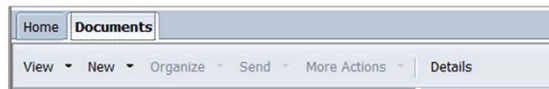
• **Details Panel**: The details panel displays the folder, document or object properties of the currently selected folder, document or Object.

1.0: Introduction to BI Launch pad

ToolBar

- The toolbar contains the following menus that you use to view and manage objects:

- View
- New
- Organize
- Send
- More Actions



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- View—Use to view objects, the latest instances of objects, and object properties
- New—Use to upload documents and create the following types of new objects:
 - Publications
 - Hyperlinks
 - Folders
 - Categories
- Organize—Use to manage object shortcuts and to cut, copy, paste, and delete objects
- Send—Use to send objects to destinations. The destinations vary, depending on your configuration.
- More Actions—Use to perform the following tasks:
 - Schedule objects
 - Add objects to categories
 - View categories that objects belong to
 - Create OpenDocument links to objects
 - View the history of an object

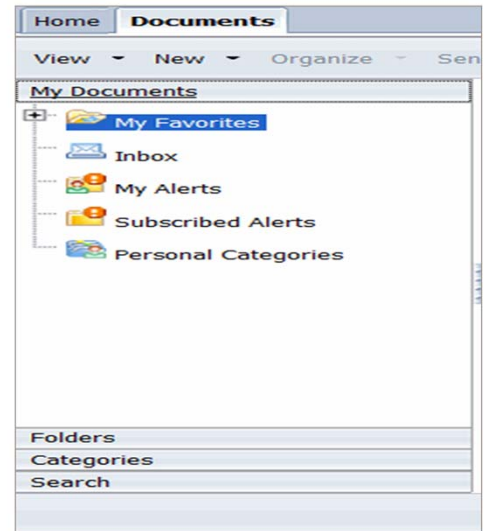
The available actions vary, depending on the object type and on your access rights.

- Details—Click to show or hide the "Details" panel.

1.0: Introduction to BI Launch pad

Navigating in the Documents Tab

- The navigation panel provides a top-level view of the folders and the categories in BI platform
- The Navigation panel of the Documents tab helps you locate individual components in your favorite folders, personal categories, inboxes, public folders, and corporate categories
- To enable a user to locate the content he is seeking, the Navigation panel is organized in to four drawers
 - My Documents
 - Folders
 - Categories
 - Search

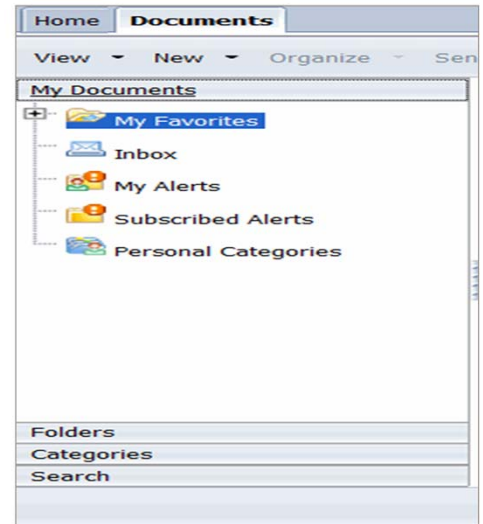


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1.0: Introduction to InfoView

Drawers

- Drawers are expandable panes on the navigation panel.
- The following drawers are available:
 - My Documents—Displays the user's My Favorites folder, BI Inbox, alert notifications, and personal categories
 - Folders—Displays a folder view of the repository
 - Categories—Displays a category view of the repository
 - Search—Displays search options and results



1.1: Functionalities Available in BI Launch pad

Setting Preferences

- Preferences determine how you log on to BI launch pad, which views appear, and which settings apply to viewed objects.
- The access rights assigned by your system administrator determine whether you can set your own preferences.
- If your administrator configured preference settings for you, you cannot change them.

1.1: Functionalities Available in BI Launch pad

Setting Preferences-General

- The General Preferences allow you to customize your starting page, the window behavior when you open or close a document, how the list panel appears in the Documents tab and the number of documents that appear in the List panel

The screenshot shows the 'Preferences - Administrator' dialog box with the 'General' tab selected. The left sidebar lists various preference categories: General, Change Password, Locales and Time Zone, Analysis edition for OLAP, Web Intelligence, BI workspaces, and Crystal Reports. The main area is titled 'General' and includes a checkbox for 'Use Default Settings (Administrator defined)'. Below this, the 'Set BI launch pad start page:' section has two radio buttons: 'Home tab' (selected) and 'Documents tab'. Under 'Home tab', there is a 'Default Home tab' option and a 'Select Home tab:' field with a 'Browse Home tab...' button. Under 'Documents tab', there are three sub-sections: 'My Documents' with radio buttons for 'My Documents' (selected), 'My Favorites', 'Personal Categories', and 'My Inbox'; 'Folders' with radio buttons for 'Public Folders' (selected) and 'Select Public Folder:' with a 'Browse Folder...' button; and 'Categories' with radio buttons for 'Corporate Categories' (selected) and 'Select Corporate Category:' with a 'Browse Category...' button.

1.1: Functionalities Available in BI Launch pad

Setting Preferences-General

- **Start Page:** Your BI Launch pad start page is the tab that will be displayed when the user first logs in:
- The following options can be selected
 - **Home Tab:** The Start page can be the Home Tab. You can set it as either the default Home Tab and customized object
 - **Documents Tab:** The Start page can be the Documents Tab. You can specify which Drawer and folder/node are open by default

1.1: Functionalities Available in BI Launch pad

Setting Preferences-General

- Columns displayed in Documents tab: You can choose which columns will display for each Object in the List Panel of the Documents

Preferences

General

Change Password

Locales and Time Zone

Analysis edition for OLAP

Web Intelligence

BI workspaces

Crystal Reports

Categories

Corporate Categories

Select Corporate Category: [Browse Category...](#)

Choose columns displayed in Documents tab:

☒ Type

☒ Last Run

☒ Instances

☐ Description

☐ Created By

☐ Created On

☐ Location (Categories)

☒ Received On (Inbox)

☒ From (Inbox)

Set document viewing location:

☒ In the BI launch pad portal as tabs

☐ In multiple full screen browser windows, one window for each document

Set the maximum number of items per page: 50

Choose columns displayed in Documents tab: This is used select the column headings to display in the summary information, for each object in the list panel:

- **Type** : The object type such as WEBI, Crystal reports, Microsoft Excel and Microsoft Word
- **Last Run** : The date and time the last scheduled instance was run.
- **Instances** : The number of instances in History
- **Description** : The description of the object from properties
- **Created By** : The username that created the object
- **Created On** : The date that the object was created
- **Location (Categories)** : The folder in which object is located
- **Received On (Inbox)** : The date object was received in BI Inbox
- **From (Inbox)** : The username that sent the object to the BI Inbox

1.1: Functionalities Available in BI Launch pad

Setting Preferences-General

- Default viewing location : You can set how a document is displayed when it is opened or created
Columns displayed in Documents tab: You can choose from the two options

Preferences

General

Change Password

Locales and Time Zone

Analysis edition for OLAP

Web Intelligence

BI workspaces

Crystal Reports

Categories

Corporate Categories

Select Corporate Category:

Choose columns displayed in Documents tab:

☒ Type

☒ Last Run

☒ Instances

☐ Description

☐ Created By

☐ Created On

☐ Location (Categories)

☒ Received On (Inbox)

☒ From (Inbox)

Set document viewing location:

☒ In the BI launch pad portal as tabs

☐ In multiple full screen browser windows, one window for each document

Set the maximum number of items per page:

- **In the BI launch pad portal as tabs:** The document will appear in the same browser window as BI Launch Pad as a tab(next to Home and Documents tabs).
- **In multiple full screen browser windows , one window for each document:** The document will open in a separate browser window

1.1: Functionalities Available in BI Launch pad

Setting Preferences-General

- Set the Maximum Number of Items Per Page:

The screenshot shows the 'Preferences-General' window. On the left is a sidebar with a tree view containing: Preferences, General (selected), Change Password, Locales and Time Zone, Analysis edition for OLAP, Web Intelligence, BI workspaces, and Crystal Reports. The main area is divided into sections: 'Categories' with radio buttons for 'Corporate Categories' (selected) and 'Select Corporate Category: Browse Category...', a 'Choose columns displayed in Documents tab:' section with checkboxes for Type, Last Run, Instances, Description, Created By, Created On, Location (Categories), Received On (Inbox), and From (Inbox) (all checked), a 'Set document viewing location:' section with radio buttons for 'In the BI launch pad portal as tabs' (selected) and 'In multiple full screen browser windows, one window for each document', and a 'Set the maximum number of items per page:' field with the value '50' entered and highlighted by a yellow box.

You can set the number of items to appear in a given List Panel document list before you need to navigate to the next page. The default is 50.

1.1: Functionalities Available in BI Launch Pad

Setting Preferences-Change Password

- This option is used to change the password:

The screenshot shows a web application window titled "Preferences - Administrator". On the left, there is a sidebar with a tree view under the "Preferences" heading. The options listed are "General", "Change Password" (which is highlighted with a blue background), "Locales and Time Zone", "Analysis edition for OLAP", "Web Intelligence", "BI workspaces", and "Crystal Reports". The main content area on the right is titled "Change Password" and contains four input fields: "User Name:" with the text "Administrator" entered, "Old Password:", "New Password:", and "Confirm New Password:".

1.1: Functionalities Available in BI Launch Pad

Setting Preferences-Locales and Time Zone

- The Locales and Time Zone preferences allow you to set how dates, times and numbers are formatted in reports
- These settings also determine the language used to display the screens and help in BI Launch pad

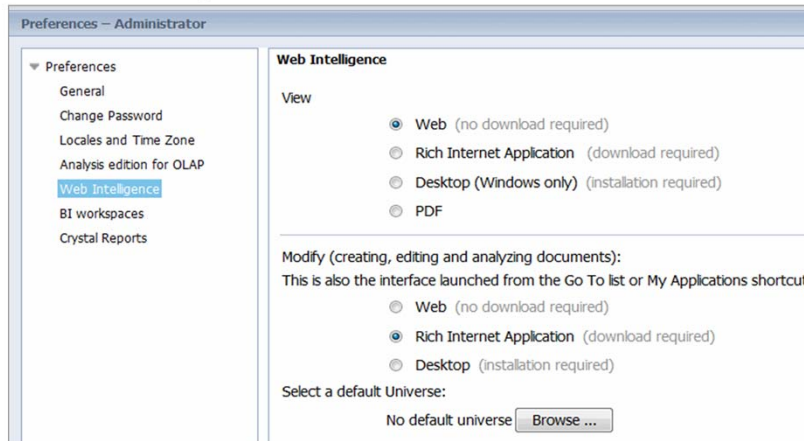
The screenshot shows the 'Preferences' menu on the left with 'Locales and Time Zone' selected. The main panel displays the following settings:

Locales and Time Zone	
Product Locale:	Use browser locale ▼
Preferred Viewing Locale:	Use browser locale ▼
Current Time Zone:	Local to web server ▼

1.1: Functionalities Available in BI Launch Pad

Setting Preferences-WEBI preferences

- WEBI preferences allow you to set options for viewing, modifying and interacting with WEBI documents



Reading Interface: The reading interface is used to View a WEBI document.

- **Web (no download required):** Enables you to view documents online, without downloading components
- **Rich Internet Application:** Installs and runs a Java applet that lets you view documents (download required)
- **Desktop (Windows only) (installation required):** Installs and runs a desktop application that lets you view documents
- **PDF:** Enables you to view documents as a PDF file

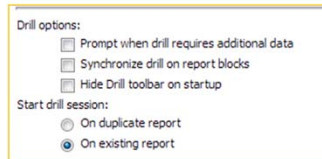
Modification Interface: This is used to create and/or edit Web Intelligence documents

- **Web (no download required) :** Enables you to create and modify documents online, without downloading components
- **Rich Internet Application** Installs and runs a Java applet that lets you view documents (download required)
- **Installs and runs a full desktop application** that lets you view documents
This option is used if you plan to work offline occasionally.

1.1: Functionalities Available in BI Launch Pad

Setting Preferences-WEBI preferences

- This option is used to set the drill options.



Drill options:

- ☐ Prompt when drill requires additional data
- ☐ Synchronize drill on report blocks
- ☐ Hide Drill toolbar on startup

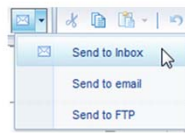
Start drill session:

- ☐ On duplicate report
- ☒ On existing report

1.1: Functionalities Available in InfoView

Sending Documents

- The Sending Documents option can be used to send a particular document to another user.
- When the document is sent to another user, it goes to the user's Inbox/Mailbox or FTP server
- This option can be used to send WebI documents as these documents are not accessible to all BI Launch pad users.



1.1: Functionalities Available in InfoView >>1.2.1: Saving and Sharing Document

Demo

- Demo Topic



1.1: Functionalities Available in BI Launch Pad


Accessing your Inbox


- Your Inbox contains the list of documents sent to you by other users.


Home Documents


View ▾ New ▾ Organize ▾ Send ▾ More Actions ▾ Details


My Documents



 My Favorites

 **Inbox**

 My Alerts

 Subscribed Alerts

 Personal Categories



Title	Received On ^	From	Type
Chart Lab book-Line : 17821	Jul 29, 2013 3:58 PM	Administrator	Web Intelligence

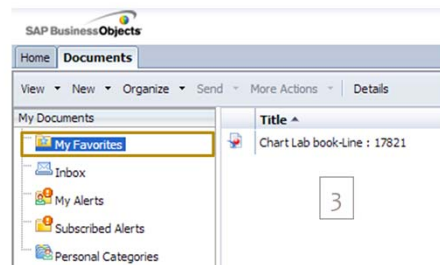
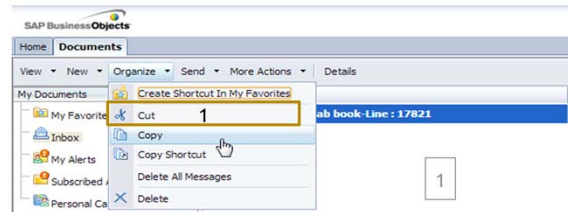
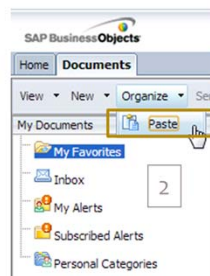
Functionalities Available with BI Launch Pad:**Accessing your Inbox:**

- The Inbox contains the list of documents sent by other users to you. This area is specific to every user.
- The Inbox is a personal storage space in BI Launch pad like your mail box. Only the user who has logged in can access their documents.

1.1: Functionalities Available in BI Launch Pad

Copy/Cut Document

- The Copy command creates a copy of an existing document in a different location.



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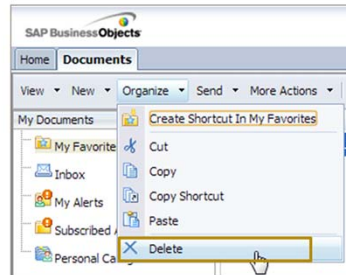
Functionalities Available with InfoView:**Copying Document:**

1. Select the document that you will be copying or moving from the list of documents in the workspace panel.
2. Select **Organize → Copy** or **Organize → Cut**.
3. You can select the folder to which you want to paste the document. You can also create a new folder where you can copy or move the document.

1.1: Functionalities Available in BI Launch Pad

Deleting Document

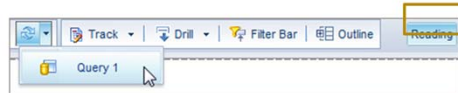
- User can remove the document from the Web Intelligence portal permanently by deleting it.
- User must have a delete document permission to delete the document.



1.1: Functionalities Available in BI Launch Pad

Refreshing a Document

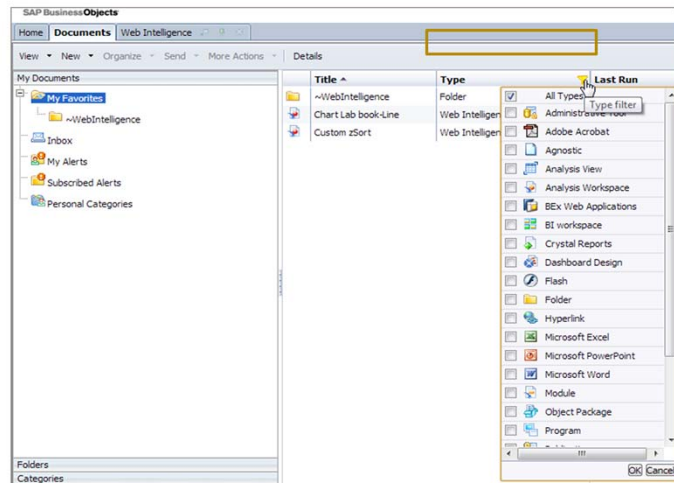
- The basic purpose of refreshing reports is to display the latest or updated data.
- Web Intelligence retrieves the data (defined in the document) from the database and returns the updated values to the reports in the document.



1.1: Functionalities Available in BI Launch Pad

Filtering Document

- A document list can be filtered on the basis of document type.



Functionalities Available with BI Launch Pad: **Filtering Document:**

Filtering the document list enables the user to display the selected type of files in the workspace window.

1.1: Functionalities Available in BI Launch Pad

Displaying User Prompts

- A prompt is a dynamic filter that displays a question every time you refresh the data in a document.
 - The prompt allows you to either type or select the value(s) to view before refreshing the data.
 - Web Intelligence retrieves only the values specified from the database and returns those values to the document.

1.1: Functionalities Available in BI Launch Pad

Finding a String in the current page

- You can search for string in the current page.
- This is possible in Reading and Design mode both

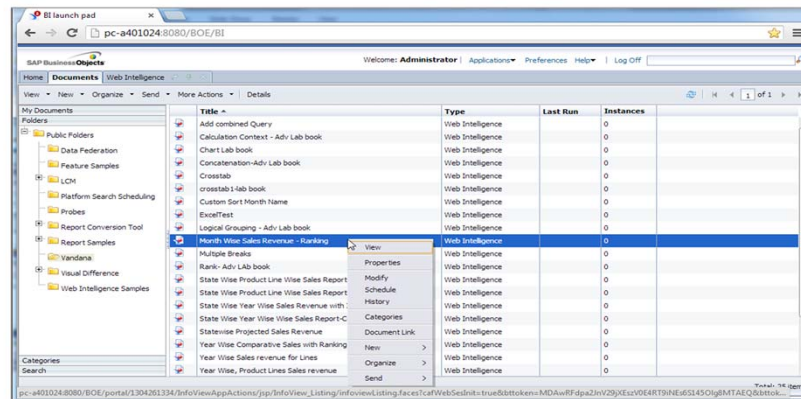
The screenshot displays the BI Launch Pad interface. On the left, a 'Document Summary' pane shows the report title 'Year Wise, Sales revenue for City Trousers - Prom' and its type 'Web Intelligence document'. The main area shows a report titled 'Report 1' with a table of sales revenue data. A search bar at the bottom left contains the text 'City', and a status bar at the bottom right indicates 'Found 3 match(es) on current page'.

Year	Lines	Sales revenue
2004	City Trousers	\$73,823
2005	City Trousers	\$144,380
2006	City Trousers	\$66,531

1.1: Functionalities Available in BI Launch Pad

Working with Documents

- Working with documents enables the user to open an existing document, navigate through the document, and perform drilling.



1.1: Functionalities Available in BI Launch Pad

Viewing Documents

- You can view Web Intelligence documents in BI Launch Pad in the following formats:
 - PDF
 - HTML
 - Interactive

1.1: Functionalities Available in BI Launch Pad

Printing Documents

- The Print Option enables the user to print the documents.
- Export to PDF for printing :
 - Web Intelligence generates a temporary PDF file from the selected report before printing.
 - You can then print out the PDF file using the Print menu in the Adobe Acrobat PDF menu.



Functionalities Available with BI Launch Pad

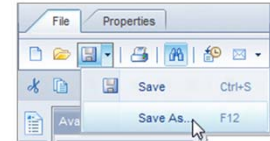
Printing Documents:

1. To use the **Print** option, ensure that you are in **Report View**.
2. Click the **Export to PDF for Printing** button on the Report toolbar.
3. The **Make Printable Version** dialog box is displayed (seen in figure in the above slide).
4. Select **Current Report** option to print entire report. Optionally, you may also specify the number of pages.
5. Click **OK**, to view the report in Acrobat Reader.
6. You can now save the report, Print the document, or e-mail the document.

1.1: Functionalities Available in BI Launch Pad

Saving a Document

- Documents can be saved in three locations:
 - Save as a Favorites Document
 - Save as a Public Document
 - Save to my computer as (.xls, .pdf or .csv).



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Functionalities Available with BI Launch Pad

Saving a Document:

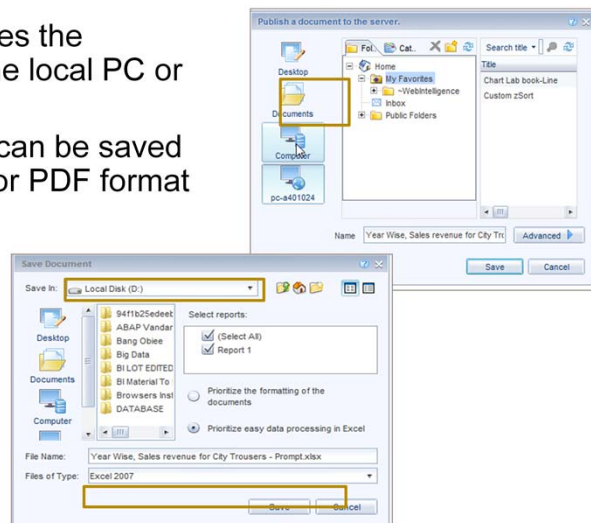
Whenever a user saves a document it is saved on the server. There are three options to save a document:

- **Save as a Favorite document:** The document is saved in a personal area allocated to every user on the server. This is specific to the users login.
- **Save as Public document:** The document is saved in a Public folder and is accessible to everyone.
- **Save to my computer:** This option saves the report as a .xls, .pdf, or .csv on the local PC or server.

1.1: Functionalities Available in BI Launch Pad

Saving a Document

- This option saves the document on the local PC or server.
- On local PC it can be saved in either Excel or PDF format

**Functionalities Available in BI Launch Pad :****Saving a Document on a Local PC:****Step 1:**

Select the document to be saved.

Step 2:

- Click the **Save As..** on the top of the page.
- From the list, select the third option **Computer** and choose the file type that you want the document to be saved as:
 - Select the folder on your computer, and click the **Save** option.
 - You can save using **Excel or PDF**.

Summary

- In this lesson, you have learnt:
 - Navigation through Web Intelligence and BI LaunchPad
 - Setup of general preferences for WebI documents, such as:
 - Organize documents
 - Save, copy and move WebI documents
 - Delete WebI documents
 - Manage documents



Review Questions

- Question 1: BI Launch Pad is used to create a Report.
 - True / False
- Question 2: Data available in Favorites is accessible to everyone.
 - True / False
- Question 3: Every Web Intelligence document resides in a _____.

