



Introduction to SAP BusinessObjects: Modern Launchpad

Workbook

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If you require this document in an alternative format, such as large print, please contact Catherine Koppe in the Digital Skills and Training team by email is.skills@ed.ac.uk or phone 0131 6513233

1. Introduction to SAP BusinessObjects

SAP BusinessObjects is the University of Edinburgh's main reporting and analysis tool. It is used by business areas across the University to create and share information.

SAP BusinessObjects consists of a Launchpad that gives access to a suite of applications. The main applications currently in use at the University are Web Intelligence and Explorer. This workbook will concentrate on using Web Intelligence documents, as they are the most widely available. The "Help Resources" section at the end of this workbook has links to learning resources for the BusinessObjects Explorer application.

BusinessObjects users only have access to the specific data required for their role at the University. Each University business unit is responsible for their own data in BusinessObjects, so if you need access to a particular area you should contact the relevant content provider to request access. The [Reporting + Analytics Data Access webpage](#) lists the most popular data sources and provides a contact email for the content provider.

BusinessObjects can be accessed using either the 'Modern' or 'Classic' Launchpad. The Modern Launchpad is recommended for finding Web Intelligence (Webi) documents, then viewing and sharing the information they contain. This workbook, which accompanies the "SAP BusinessObjects Introduction" classroom course, will show you how to use the Modern Launchpad.

The Classic Launchpad is recommended if you need to edit existing Webi documents, or create new ones. The "SAP BusinessObjects Advanced" course and workbook show you how to do this. In order to be able to create new Webi documents you need to have an advanced user licence. Attendance on the "SAP BusinessObjects Advanced" course is required to get the advanced licence.

2. Modern Launchpad

Learning objectives:

- Log in to the Modern BusinessObjects Launchpad.
- Switch between the Launchpad tabs.
- Find a public document on the Folders tab.
- Sort and filter the documents in a folder.
- Mark a public document as a favourite, and view the favourites list on the My Home tab.
- Be able to change your user settings.

2.1 Log in

Firefox is the recommended web browser to use with BusinessObjects.

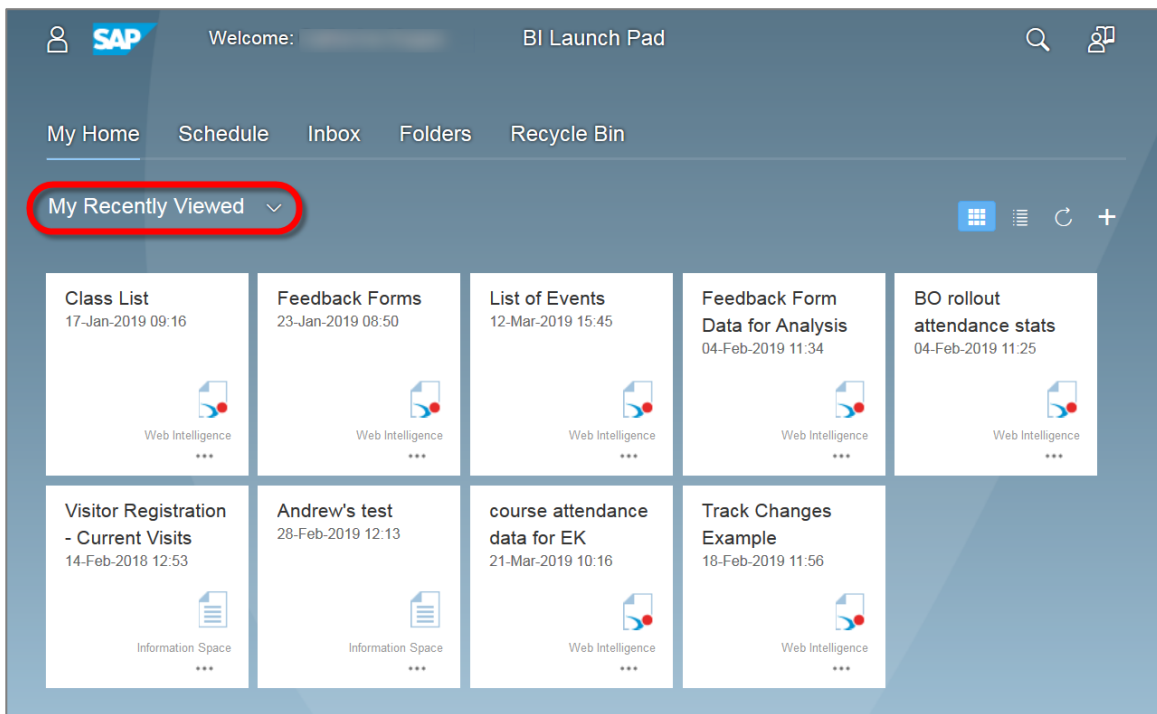
1. Start Firefox and go to MyEd www.myed.ed.ac.uk
2. Log on using your EASE username and password.
3. Locate the **Reporting + Analytics** channel. If the Reporting + Analytics channel is not visible, add it using the **Customize** link (top left). Click on the **Modern Launchpad** button.

4. The Modern Launchpad will open in a new browser tab. You may be prompted for letters from your EASE memorable word.

2.2 Launchpad overview

SAP BusinessObjects 4.2 has a new Modern Launchpad with a “fiorified” user experience designed to make the user interface simple and intuitive.

When you log in to SAP BusinessObjects, the Launchpad opens on the **My Home** tab. By default, this displays a list of your recently viewed documents. You can change what is shown here using the menu.



The Launchpad has 4 other tabs:

- **Schedule** – where you can view all the scheduled documents you have access to.
- **Inbox** – for documents sent to you by another SAP BusinessObjects user.
- **Folders** – where you will find your personal documents, as well as any public documents you have been given access to.
- **Recycle Bin** – if you delete a document you can find it on this tab until it is permanently deleted after 30 days.

2.3 Folders tab

1. Select the **Folders** tab in the Launchpad.

The Folders tab allows you to browse public and private documents. The panel on the left displays 2 options:

- **My Folders** is your file space where you can create folders and save copies of documents.
- **Public Folders** contains professionally prepared standard reports for different business areas. Which public folders you have access to will depend on the area you work in.

The screenshot shows the SAP BI Launchpad interface. The top navigation bar includes 'My Home', 'Schedule', 'Inbox', 'Folders', and 'Recycle Bin'. The 'Folders' tab is active. On the left sidebar, 'My Folders' and 'Public Folders' are listed, with 'My Folders' highlighted by a red box. The main content area displays a table of folders and documents under the 'My Folders' breadcrumb.

Title	Type	Last Updated
~WebIntelligence	Folder	17-May-2018 09:20
Andrew's test	Information Space	28-Feb-2019 12:13
course attendance data for	Web Intelligence	21-Mar-2019 10:16
Course examples	Folder	15-Jan-2019 13:23
data for Tracy	Web Intelligence	04-Feb-2019 10:54
Event Booking Courses	Information Space	20-Dec-2018 09:06
Master copies - Do Not De	Folder	20-Dec-2018 09:06
Org Units for Events Booki	Microsoft Excel	28-Jan-2019 13:44

2. Select **Public Folders** to display the list of folders that you have access to.

3. Select the **Training** folder, then the **Introduction Course** folder.

The central area will display the content of the folder as a list.

There is a clickable breadcrumb trail above the list.

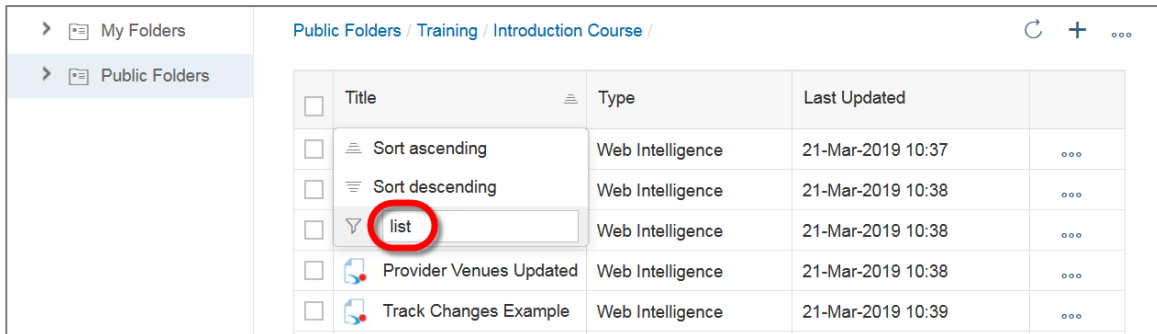
The screenshot shows the SAP BI Launchpad interface with the 'Public Folders' selected in the left sidebar. The breadcrumb trail 'Public Folders / Training / Introduction Course /' is highlighted by a red box. The main content area displays a table of documents under the 'Introduction Course' breadcrumb.

Title	Type	Last Updated
Course List	Web Intelligence	21-Mar-2019 10:37
List of Events	Web Intelligence	21-Mar-2019 10:38
Provider Venues	Web Intelligence	21-Mar-2019 10:38
Provider Venues Updated	Web Intelligence	21-Mar-2019 10:38
Track Changes Example	Web Intelligence	21-Mar-2019 10:39

The Type column shows the file type, for example Web Intelligence document or Explorer Information Space.

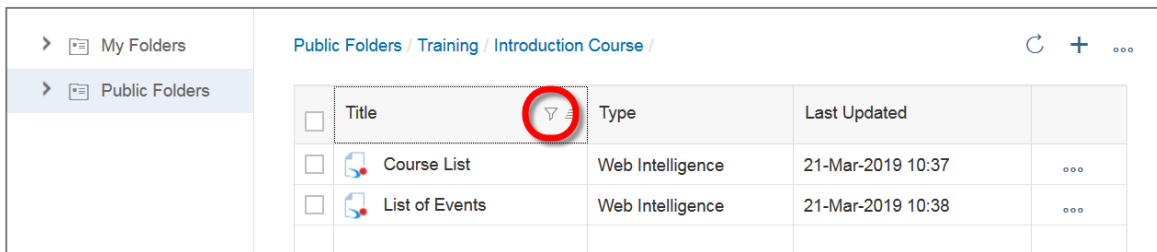
You can sort and filter a list of documents by clicking on any of the column headers.

4. To sort the list of documents, select one of the column headers and choose **Sort ascending** or **Sort descending**.
5. To filter the documents to show only documents with “list” in the title, click on the **Title** column header. Type “list” into the Filter box and press the **Return** key.



	Title	Type	Last Updated	
<input type="checkbox"/>	Sort ascending	Web Intelligence	21-Mar-2019 10:37	...
<input type="checkbox"/>	Sort descending	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	list	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	Provider Venues Updated	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	Track Changes Example	Web Intelligence	21-Mar-2019 10:39	...

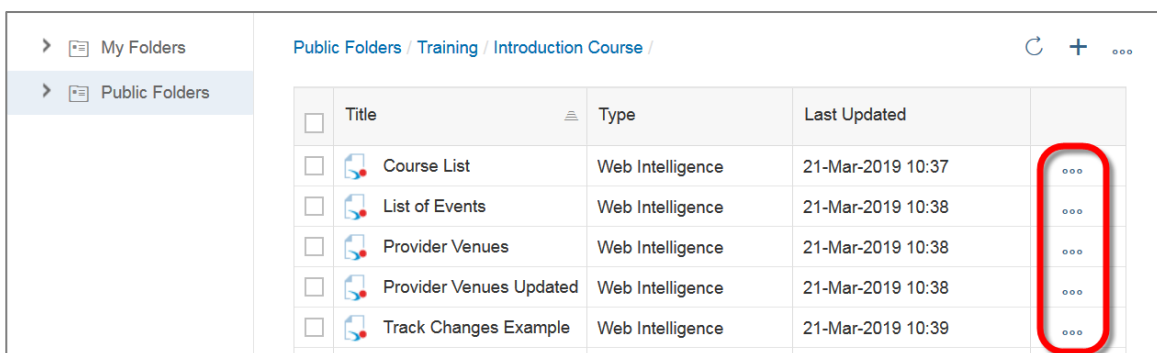
The list of documents will be filtered to show only those with “list” in the title. The Title column header displays a filter icon to remind you that a filter is in place.



	Title	Type	Last Updated	
<input type="checkbox"/>	Course List	Web Intelligence	21-Mar-2019 10:37	...
<input type="checkbox"/>	List of Events	Web Intelligence	21-Mar-2019 10:38	...

6. To remove the filter, click on the **Title** column header again, delete the word “list” from the filter box and press the **Return** key.

Each document in the list has its own **More** button (three dots), which provides quick links to various tasks such as Schedule, Copy and Send To.

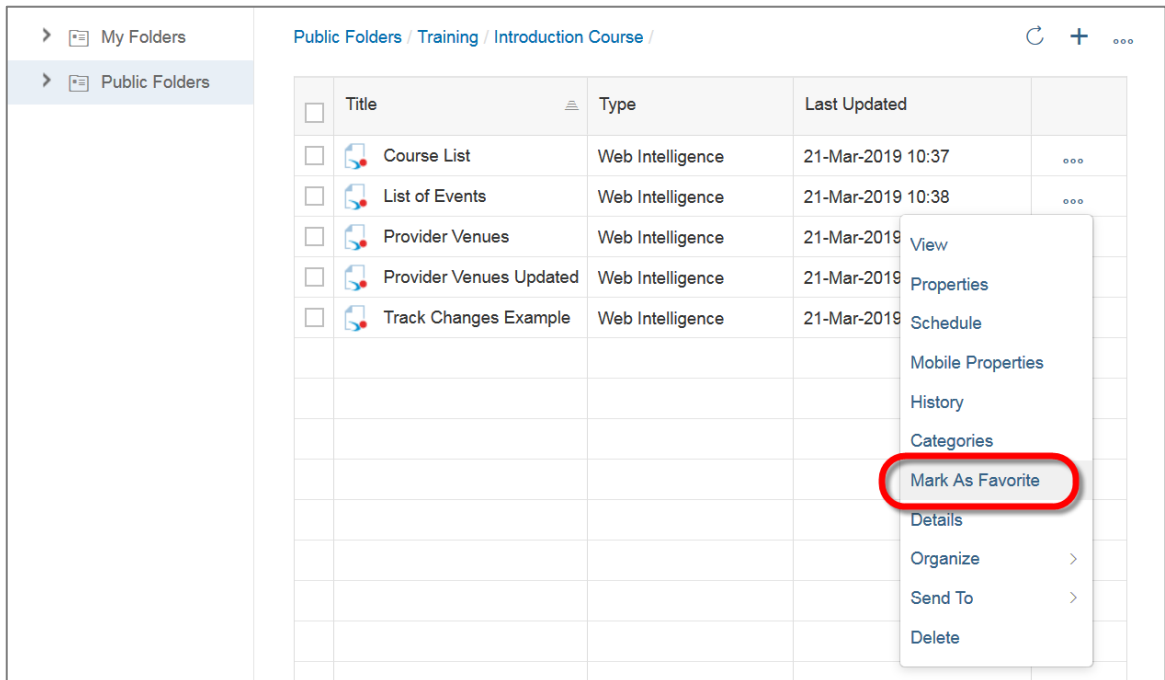


	Title	Type	Last Updated	
<input type="checkbox"/>	Course List	Web Intelligence	21-Mar-2019 10:37	...
<input type="checkbox"/>	List of Events	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	Provider Venues	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	Provider Venues Updated	Web Intelligence	21-Mar-2019 10:38	...
<input type="checkbox"/>	Track Changes Example	Web Intelligence	21-Mar-2019 10:39	...

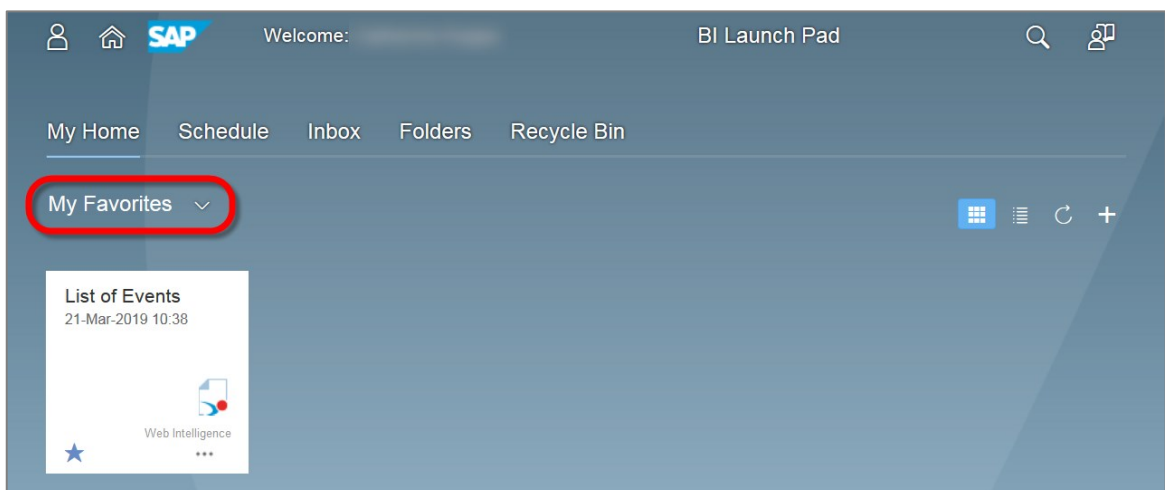
2.4 Favourite documents

Documents can be marked as a favourite. This allows you to find public documents again more easily by adding them to your favourites list, which can be viewed using the menu on the My Home tab.

1. Check you are on the **Folders** tab, in **Public Folders > Training > Introduction Course**.
2. Select the **More** button (three dots) to the right of the **List of Events** document and choose **Mark As Favorite**.



3. Click on the **My Home** tab and choose **My Favorites** from the menu. The **List of Events** document will be shown.



When you mark a document as a favourite, you are not making a copy of the document. Each entry on your favourites list is a shortcut to the source document in the Public Folder.

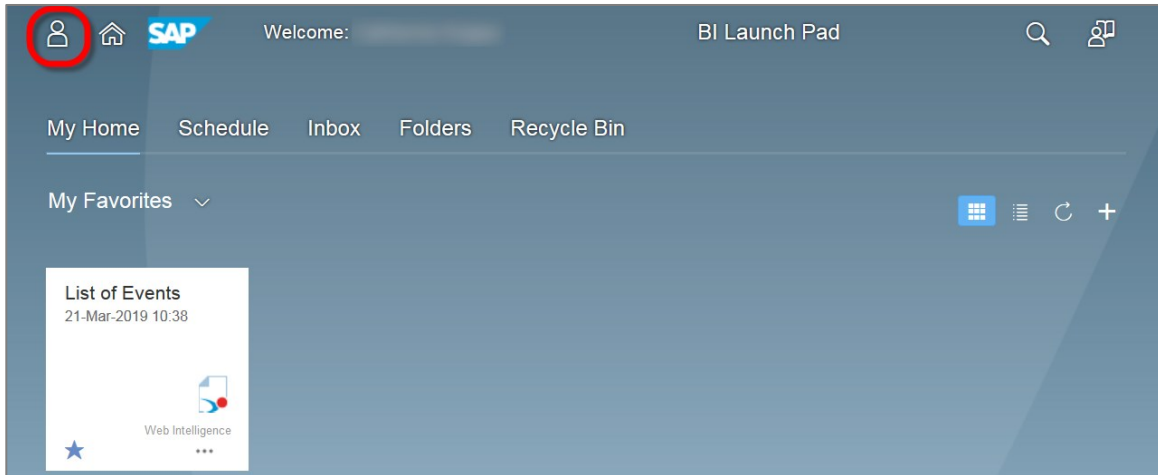
The advantage of marking documents as favourites is that it guarantees you are always working with the most up to date version of the source document.

If you want to remove a document from your favourites list, you can do so by clicking on its **More** button and choosing **Remove from Favorite**.

2.5 User settings

Your user settings allow you to change the appearance of some parts of BusinessObjects.

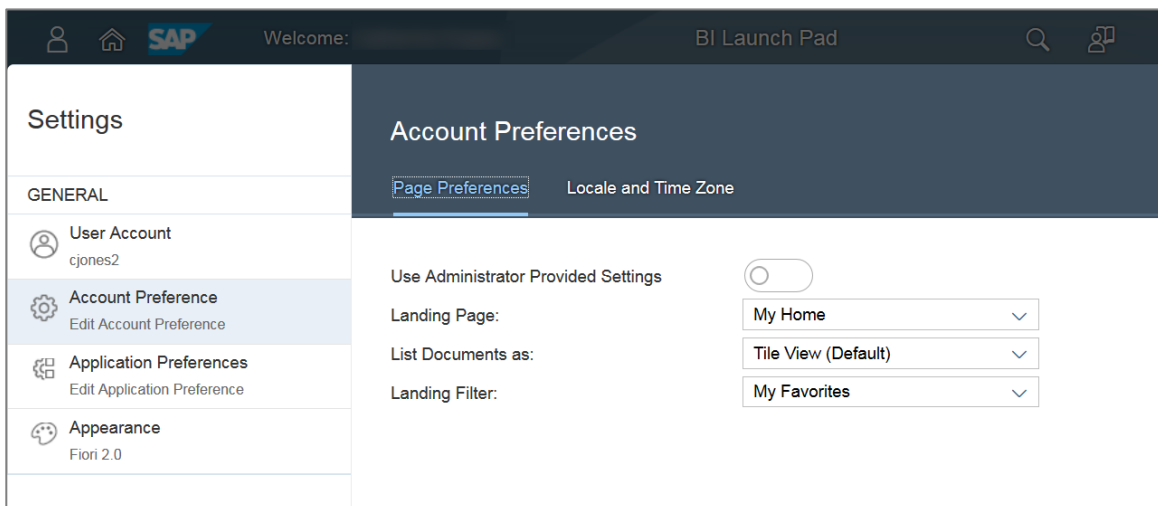
1. Click on the **Settings** button at the top left of the Launchpad.



2. Choose **Settings**, then **Account Preference**.

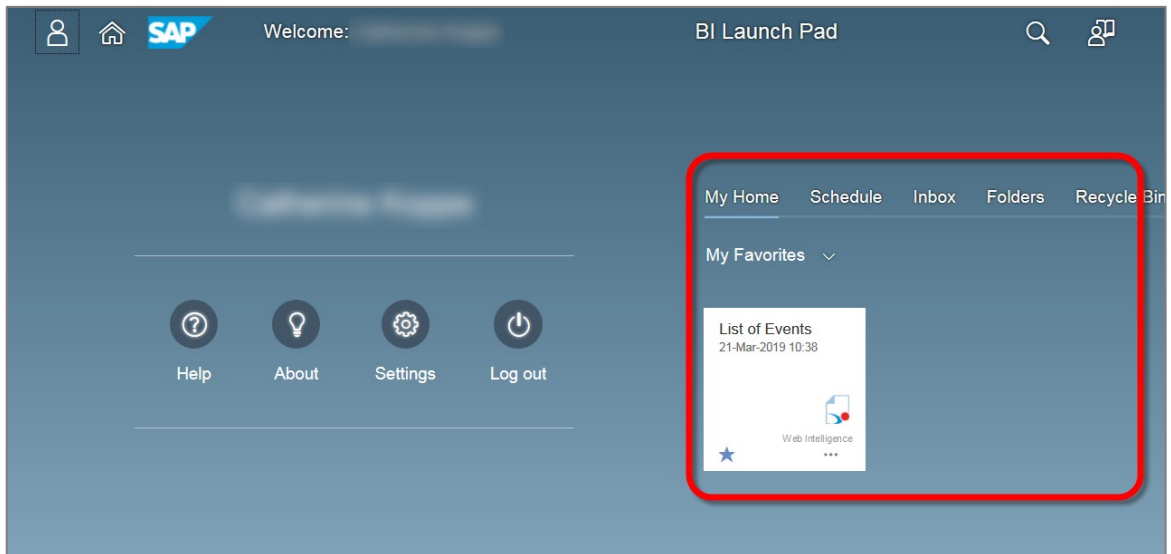
Here you can change what is displayed by default on the **My Home** tab, which can be very useful if you use the 'Mark As Favorite' feature.

3. Unselect **Use Administrator Provided Settings**. Check **Landing Page** is "My Home" and change **Landing Filter** to "My Favorites".



The next time you log in the documents you have marked as favourites will be listed on the My Home tab.

4. The Launchpad has an alternative darker colour-scheme. If you would like to switch to this click on **Appearance** in the left panel, and choose “SAP Belize Deep” from the **Theme** menu.
5. When you are happy with the settings, click **Save**, then click on the right side of the screen (Launchpad preview) to close the settings.



Changes to the Launchpad will take effect when the browser tab is refreshed.

2.6 Additional Exercises

Extra exercises to try if you have time.

- a) Go to the Folders tab and expand the Public Folders. Look through the public folders that you have access to.
- b) Sort the documents in a public folder by the date they were last updated.
- c) Filter the documents in a public folder using a word in at least one of the documents' titles. Remove the filter.
- d) Mark a document in a public folder as a favourite. Switch to the My Home tab and check that it appears in your My Favorites list.

3. Interactive Viewer

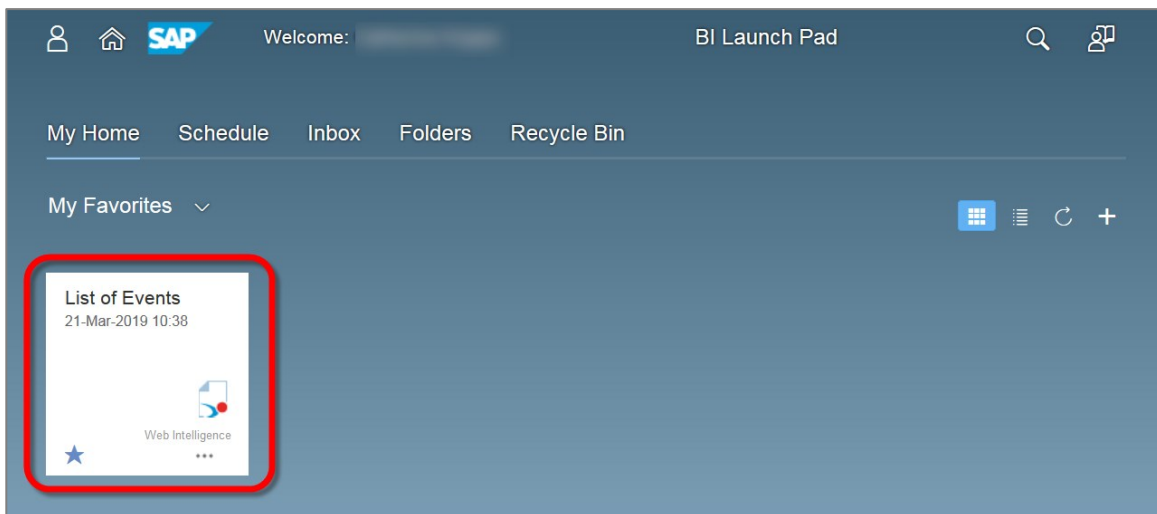
Learning objectives:

- Open a Web Intelligence (Webi) document.
- Move between pages in the report and zoom in and out.
- Use a filter to display a sub-set of data.
- Display the side panel and switch between its tabs.
- Switch between reports.
- Refresh the data in the document, including filling in prompts.
- Save prompt variants.
- Return to the Launchpad.
- Close a Webi document.

3.1 Open a Web Intelligence document

We will open the **List of Events** document from the Public Folders > Training > Introduction Course folder, which we marked as a favourite in the previous section of the workbook.

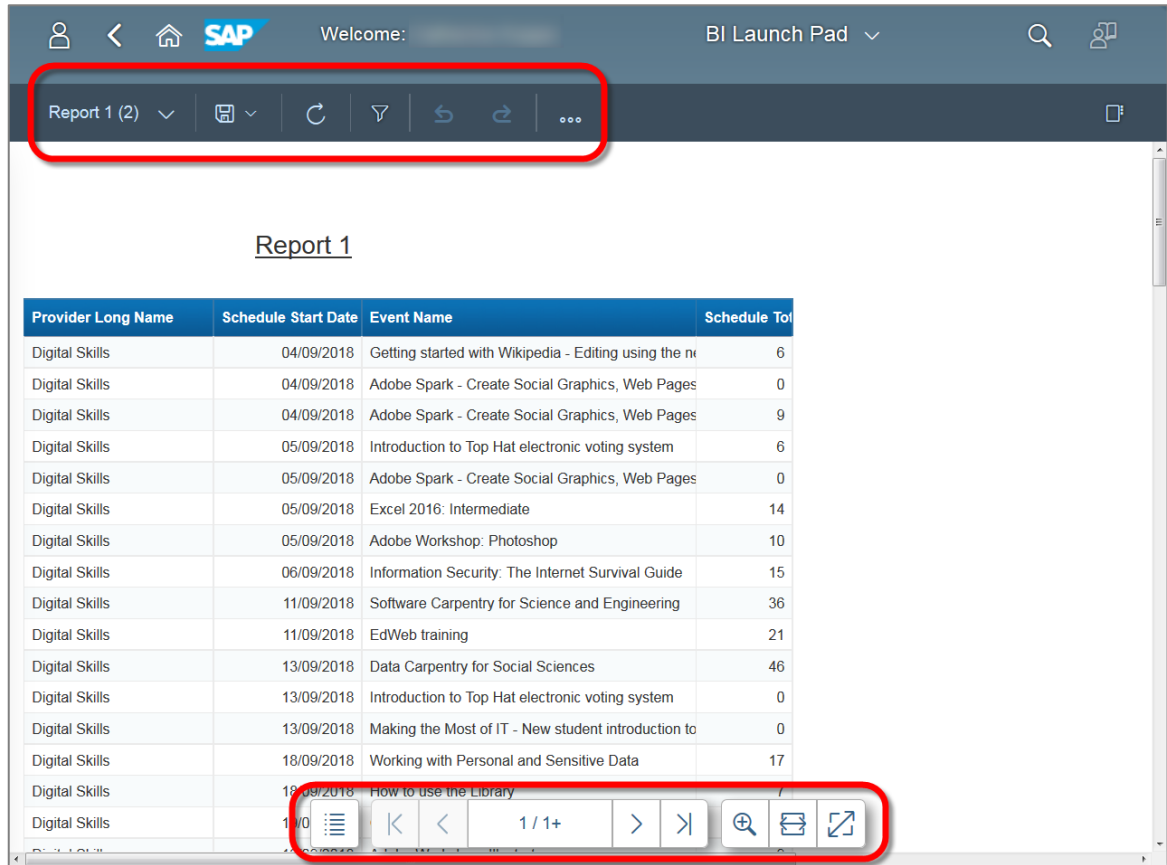
1. Make sure you are on the **My Home** tab in the Launchpad. Select **My Favorites** from the menu, click on the **List of Events** tile.



The document will open in the interactive viewer.

3.2 Interactive viewer overview

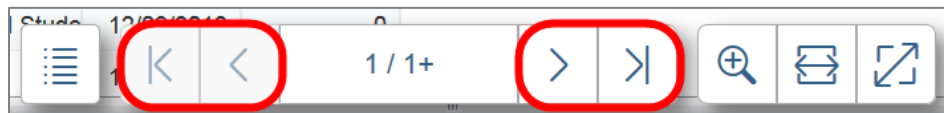
There is a permanent toolbar at the top of the screen, and if you hover the mouse over the bottom of the screen another toolbar appears.



The screenshot shows the SAP BI Launchpad interface. At the top, there is a navigation bar with a user profile icon, a home icon, the SAP logo, a 'Welcome:' message, and a 'BI Launch Pad' dropdown menu. Below this is a permanent toolbar containing icons for report selection, refresh, filter, undo, redo, and a menu icon. A red box highlights this top toolbar. The main content area displays a report titled 'Report 1' with a table of data. At the bottom of the report, a secondary toolbar is visible, containing icons for list view, navigation (left and right arrows), page navigation (1/1+), zoom in (magnifying glass), zoom out, and share. A red box highlights this bottom toolbar.

Provider Long Name	Schedule Start Date	Event Name	Schedule To
Digital Skills	04/09/2018	Getting started with Wikipedia - Editing using the n	6
Digital Skills	04/09/2018	Adobe Spark - Create Social Graphics, Web Pages	0
Digital Skills	04/09/2018	Adobe Spark - Create Social Graphics, Web Pages	9
Digital Skills	05/09/2018	Introduction to Top Hat electronic voting system	6
Digital Skills	05/09/2018	Adobe Spark - Create Social Graphics, Web Pages	0
Digital Skills	05/09/2018	Excel 2016: Intermediate	14
Digital Skills	05/09/2018	Adobe Workshop: Photoshop	10
Digital Skills	06/09/2018	Information Security: The Internet Survival Guide	15
Digital Skills	11/09/2018	Software Carpentry for Science and Engineering	36
Digital Skills	11/09/2018	EdWeb training	21
Digital Skills	13/09/2018	Data Carpentry for Social Sciences	46
Digital Skills	13/09/2018	Introduction to Top Hat electronic voting system	0
Digital Skills	13/09/2018	Making the Most of IT - New student introduction to	0
Digital Skills	18/09/2018	Working with Personal and Sensitive Data	17
Digital Skills	18/09/2018	How to use the Library	7
Digital Skills	11/0		

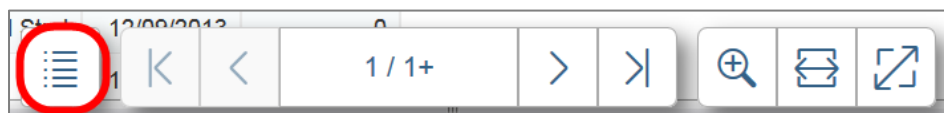
1. Use the arrow buttons on the bottom toolbar to move between the pages of the report.



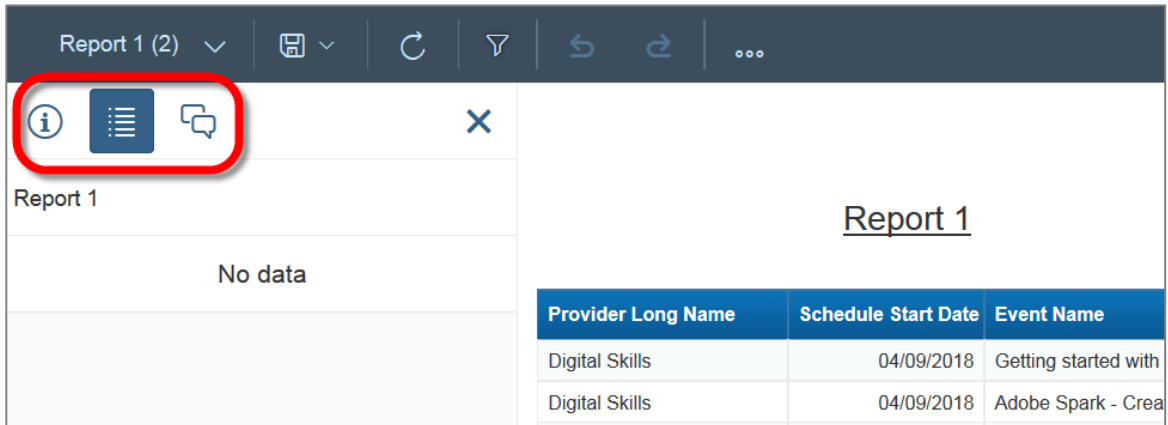
2. Use the magnifying glass button on the bottom toolbar to zoom in and out on the report.



3. Click the **Show Section Navigation** button at the left of the bottom toolbar to display the side panel.

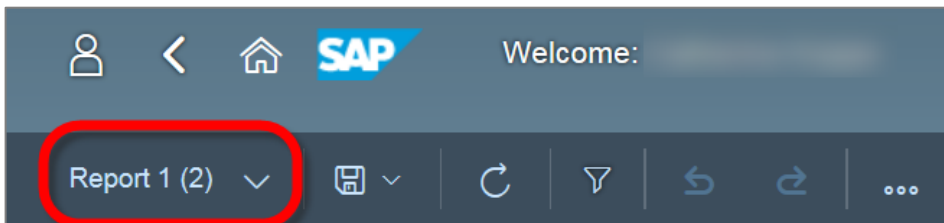


- Use the tabs at the top of the side panel to switch between the **Navigation Map**, **Document Summary** and **Comments** tabs.



A Web Intelligence document can contain several reports.

- Switch to **Report 2** using the **Report** menu at the left of the top toolbar.



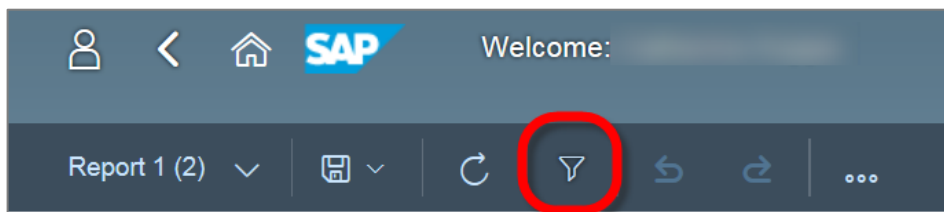
The number in brackets on the **Report** menu in the top toolbar tells you how many reports are in the document.

- Use the **Report** menu to switch back to **Report 1**.

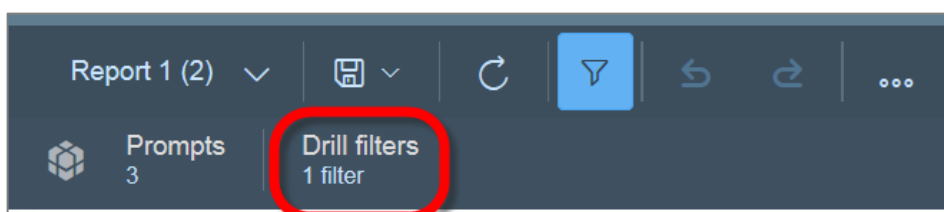
3.3 Filters

Some Web Intelligence reports contain filters that allow you to display a sub-set of the data.

- In the **List of Events** document, click on the **Show/Hide Input Controls** button in the top toolbar.



- Click on the **Drill filters** button to display any filters available for the report.



3. Click on the **Event Name** filter and choose one of the names in the list. Click **OK**.
Note that the report has been filtered to display only the events with the chosen name.

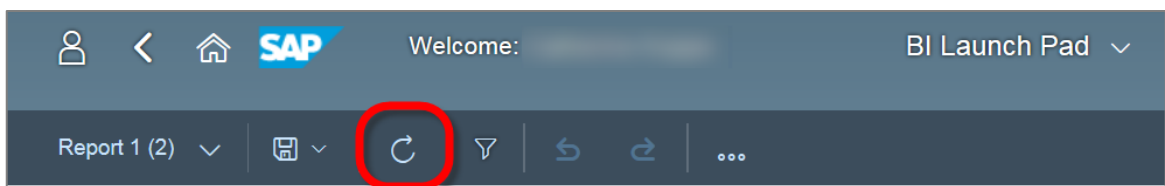
4. To remove the filter, click on the **Event Name** filter in the top toolbar, choose **Select All**, then **OK**.

5. Click on the **Show/Hide Input Controls** button in the top toolbar to hide the filter.

3.4 Refresh the document

It is important to be aware of how old the data in your document is.

1. In the **List of Events** document, hover the mouse over the **Refresh** button in the top toolbar to see the date the document was last refreshed.

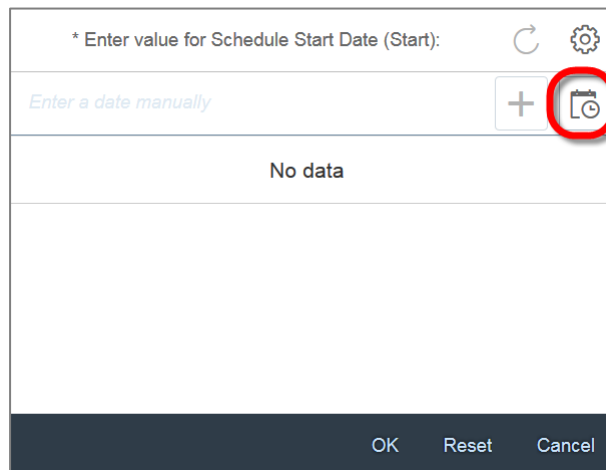


You can also see the last refresh date in the left panel on the **Document Summary** tab, **Statistics** section.

2. Select the **Refresh** button in the top toolbar.

3. The **Prompts** window will open. This document contains three prompts. Select the first prompt, **Enter value for Schedule Start Date (Start)**.

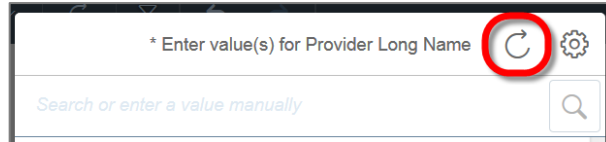
4. Use the **Date** button to set the start of the date range to **01/12/2018**.



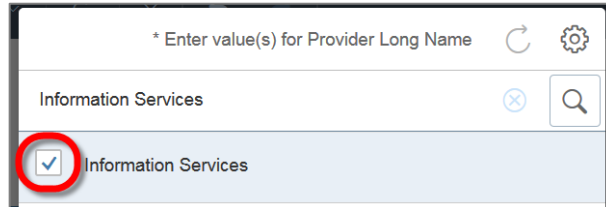
5. **Close** the calendar window and click **OK** to return to the **Prompts** window.

6. Select the second prompt in the **Prompts** window, **Enter value for Schedule Start Date (End)**, and use the **Date** button to set the end of the date range to **31/12/2018**.

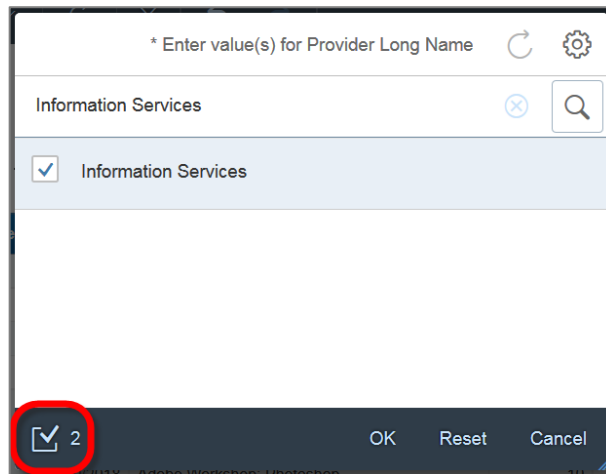
7. Select the third prompt, **Enter value(s) for Provider Long Name**. Click the Refresh button at the top right of the window to view a list of event providers.



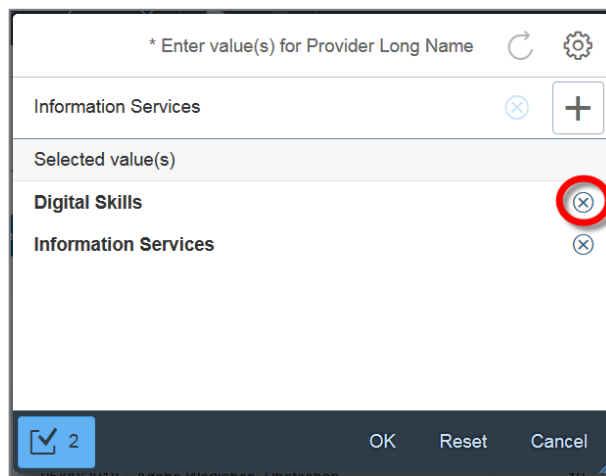
8. Scroll down to view the list of providers. It is a long list, so use the search box at the top of the list to search for "Information Services".
9. Tick the box to the left of the **Information Services** provider to select it.



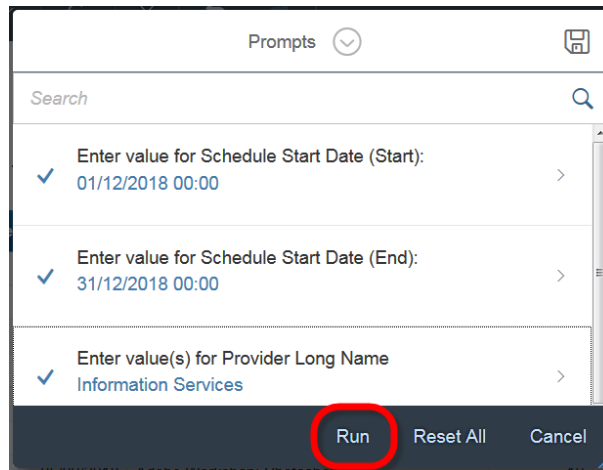
10. The Display button at the bottom left of the window tells you how many values are selected – in this case two. Click the **Display** button to view the selected values.



11. We only want to view courses run by the Information Services provider, so delete the Digital Skills Provider.



13. Select **OK** to return to the prompts overview, then **Run** to refresh the document.

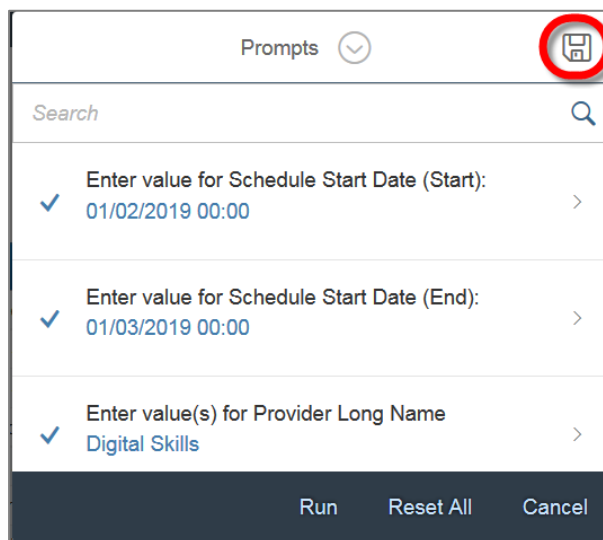


The document will refresh and display only events from the Information Services provider in December 2018.

3.5 Prompt variants

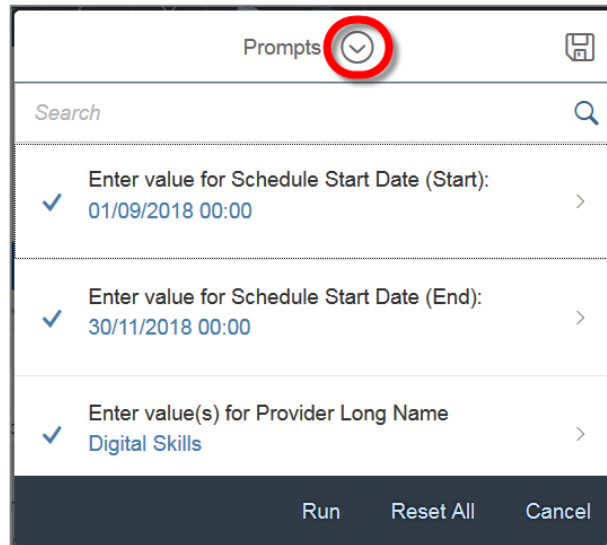
If you are using a Web Intelligence document with many prompts it is possible to save a prompt variant to save you time filling them in.

1. In the **List of Events** document, click on the **Refresh** button in the top toolbar
2. Fill in the prompts to return courses between **01/02/2019** and **01/03/2019** for the **Digital Skills** provider.
3. Click on the **Save** button at the top right of the Prompts window.



4. Name your prompt variant "Test" followed by your initials. Click **Save**.
5. **Cancel** the refresh.
6. Click on the **Refresh** button in the top toolbar to re-open the Prompts window.

- Click on the down arrow (**Variants management**) next the word “Prompts” at the top middle of the Prompts window.

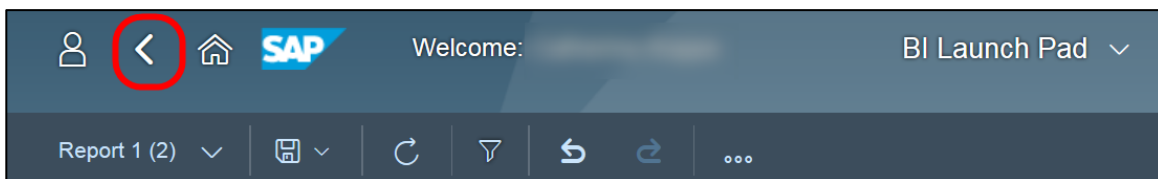


- Choose the variant you just saved.
 - Click **Run** to refresh the document using the prompts saved in your variant.
- The prompt variant will be saved for you to use whenever you log in to BusinessObjects.

To delete a prompt variant, open **Variants management** then click the **Delete** button (wastepaper bin) to the right of the variant you wish to delete. Click the button a second time to confirm the deletion.

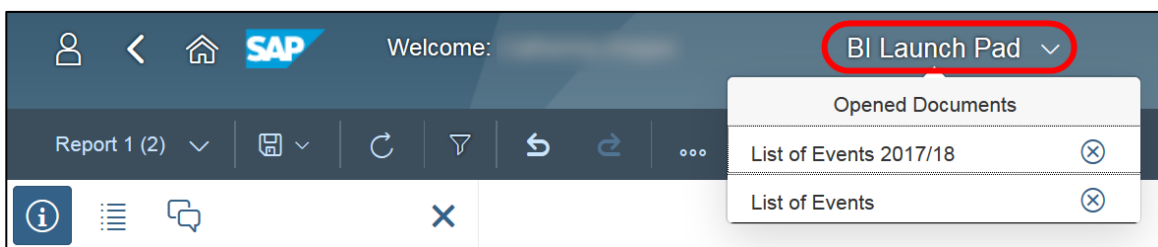
3.6 Return to the Launchpad

- When you have finished viewing a document, use the **Navigate Back** button (top left of screen) to return to the Launchpad.



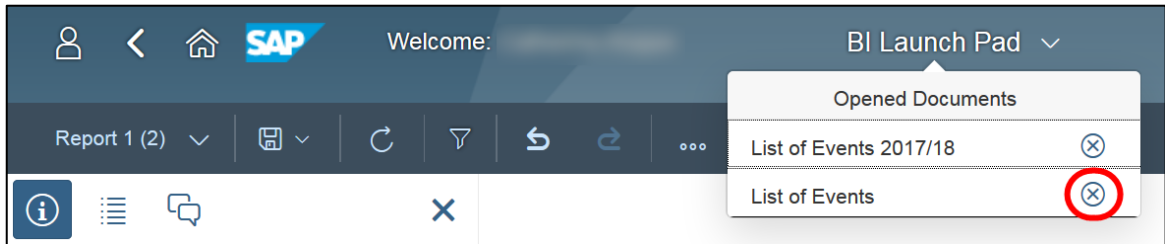
This will leave the document open.

- Open the **BI Launch Pad** menu to see a list of open documents.



You can select the document’s name in the BI Launch Pad menu to switch to the document.

3. Close the **List of Events** document by selecting the small **X** button next to its name in the **BI Launch Pad** menu.



3.7 Additional Exercises

Extra exercises to try if you have time.

- a) Open a Webi document from the Public Folders.
- b) Did the document automatically refresh when you opened it? If not, find out how long it was since the document was last refreshed and refresh it now.
- c) Does the document have any prompts? If it does, save a prompt variant.
- d) How many reports does the document contain?
- e) How many pages are in the first report?
- f) Does the document contain any filters? If it does, practice using them to change the data that is displayed.
- g) Use the side panel to find the UUN of the person who created the document.
- h) Return to the Launchpad and close any open Webi documents.

4. Sharing data

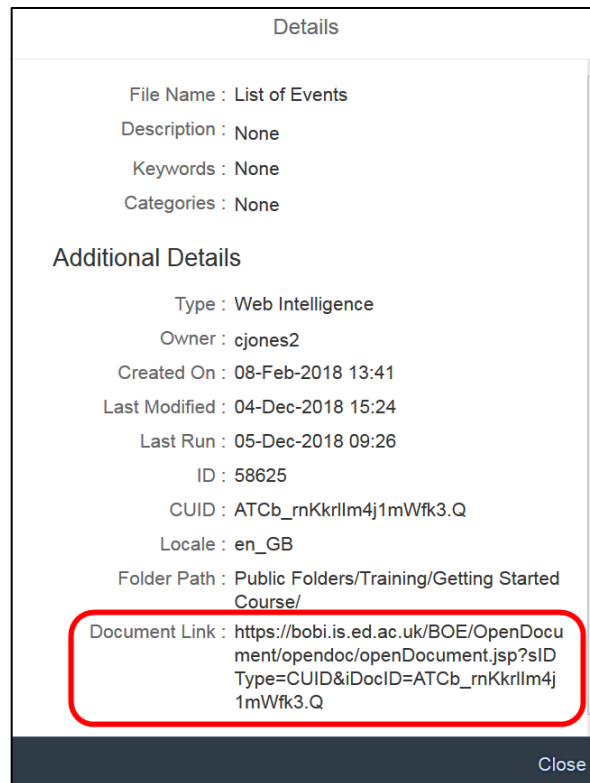
Learning objectives:

- Share the URL of a document in a public folder.
- Preview and print a Webi document.
- Export a Webi document to Excel.

4.1 Share a public document's URL

If you want to share a document saved in the Public Folders outside BusinessObjects you can copy a URL link to it.

1. On the **Folders** tab, open **Public Folders > Training > Introduction Course**.
2. Click on the **More** (three dots) button to the right of the **List of Events** document and choose **Details**.
3. Select and copy the **Document Link**.



The document link can then be pasted into an email or Word document, just as you would with any other URL. Note that the link will open the document in the Classic Launchpad.

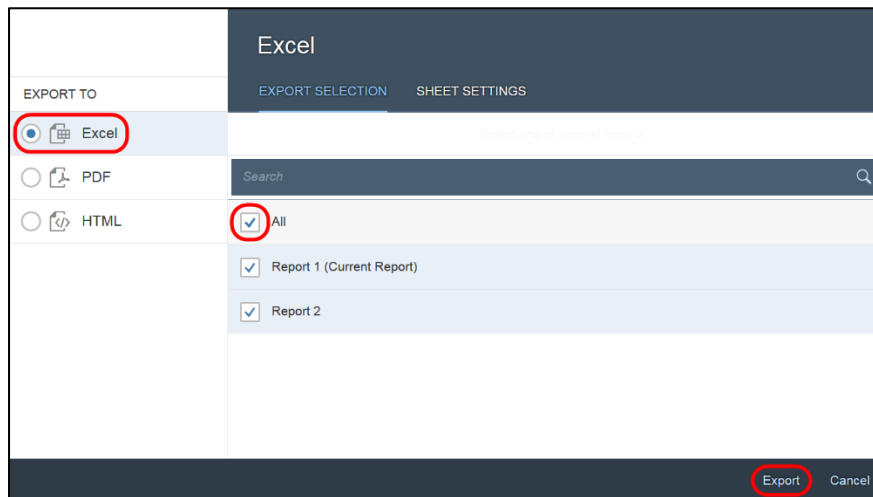
4.3 Export to Excel

1. Navigate to **Public Folders > Training > Introduction Course** and open the **List of Events** document.

2. Click on the **More** button in the top toolbar and choose **Export**.

The Excel radio button is selected by default.

3. Tick the **All** box to export all the reports in the document, and choose **Export**.



This will export the data in an .xlsx file.

4. Open the file when prompted, and view the data in Excel.

4.4 Print preview & export PDF

Webi documents should be converted to PDFs for printing. You can use the page mode view to preview how the document will look as a PDF before exporting it.

1. Open the **List of Events** document located in **Public Folders > Training > Introduction Course**, if it is not already open.

2. Click on the **More** button in the top toolbar and choose **Page Mode**.

Check that you are happy with the document's appearance. If there are any problems, they can be fixed using the Classic Launchpad's Design mode (covered in the Advanced course).

3. Click on the **More** button in the top toolbar and choose **Export**.

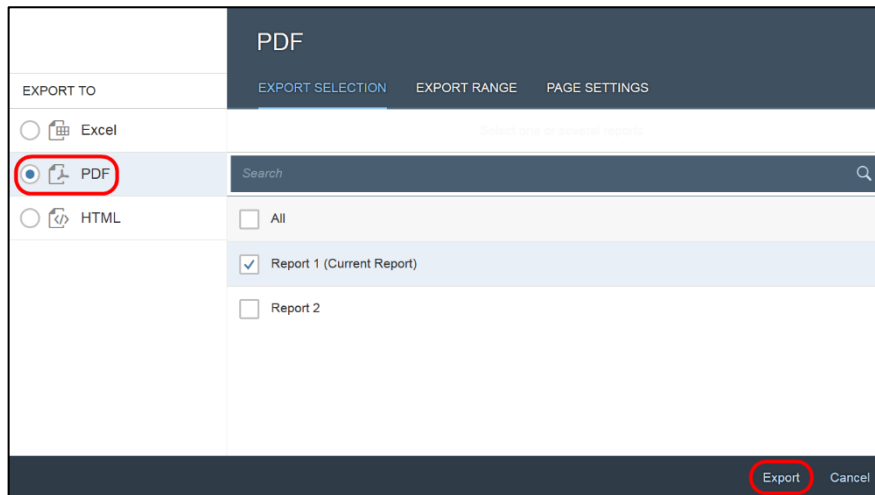
4. Select the **PDF** radio button.

On the **Export Selection** tab, you can choose which reports you want to export.

On the **Export Range** tab, you can choose which pages you want to export.

The **Page Settings** tab lets you choose the resolution of any images in the document.

6. When you are happy with the settings, click the **Export** button.



The document will be converted to a PDF file which you can open or save. If you choose open, the document will be displayed in a PDF viewer. Use the PDF viewer's options to print.

7. Back in the Interactive Viewer, click on the **More** button and choose **Quick Display Mode** to return to the normal view.

4.5 Additional Exercises

Extra exercises to try if you have time.

- Find the Document Link (URL) of a document in the Public Folders.
- Open and refresh a Webi document. Export the data on the first report as an Excel file.
- Open and refresh a Webi document. View the document in Page Mode. Export all of the document's reports as a PDF. Return to the document in BusinessObjects and switch back to Quick Display Mode.
- Return to the Launchpad and close any open Webi documents.

5. Scheduling

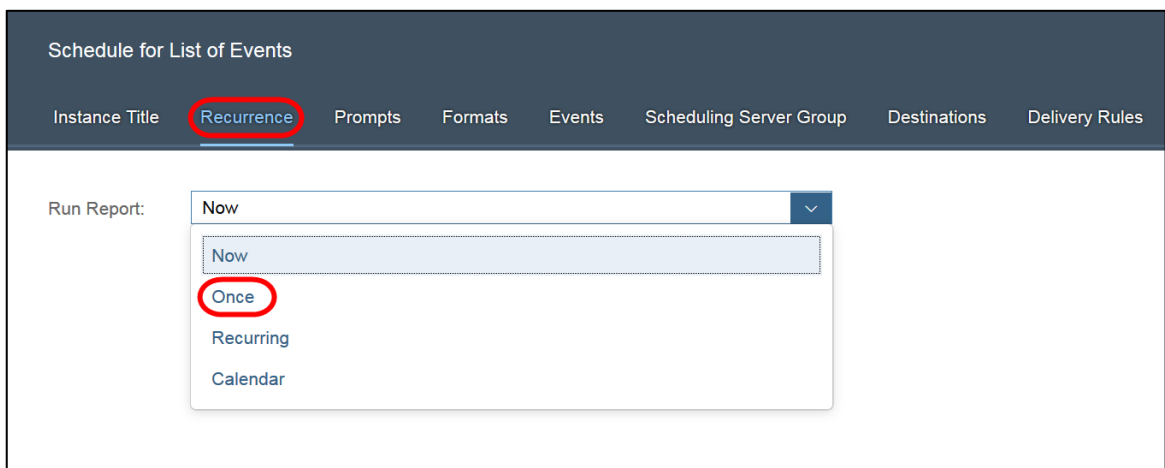
Learning objectives:

- Schedule a document to run at a set time.
- Be aware that scheduled instances can be saved in different formats and places.
- View a document's history and open a saved instance.

5.1 Set up a schedule

Scheduling a document sets it to run at a date and time that you specify and creates a copy ("instance") that you can view later. Scheduled documents can run when you are not logged in to BusinessObjects. We recommend that documents are scheduled to run outside office hours to reduce the load on the server.

1. Navigate to **Public Folders > Training > Introduction Course**.
2. Select the **More** button (three dots) to the right of the **List of Events** document and choose **Schedule**.
3. The **Schedule** dialogue window will open. Open the **Recurrence** tab and set the **Run Report** menu to **Once**.



You can use the **Run Report** menu to set different schedules for when the document will run.

4. Set the **Start Date** to 5 minutes from the current time.

The **End Date** is set by default to several years in the future. This does not need to be changed.

If the document contains prompts they must be scheduled to allow the document to refresh successfully.

5. Open the **Prompts** tab and set **Schedule Start Date (Start)** to **01/01/2019** and **Schedule Start Date (End)** to **31/01/2019**.
6. Open the **Formats** tab and ensure that **Web Intelligence** is selected in the **Formats** menu. You can also use this option to save the scheduled instance as an Excel file or PDF.

- Open the **Destinations** tab and ensure that **Default Enterprise Location** is selected in the **Destination** menu.

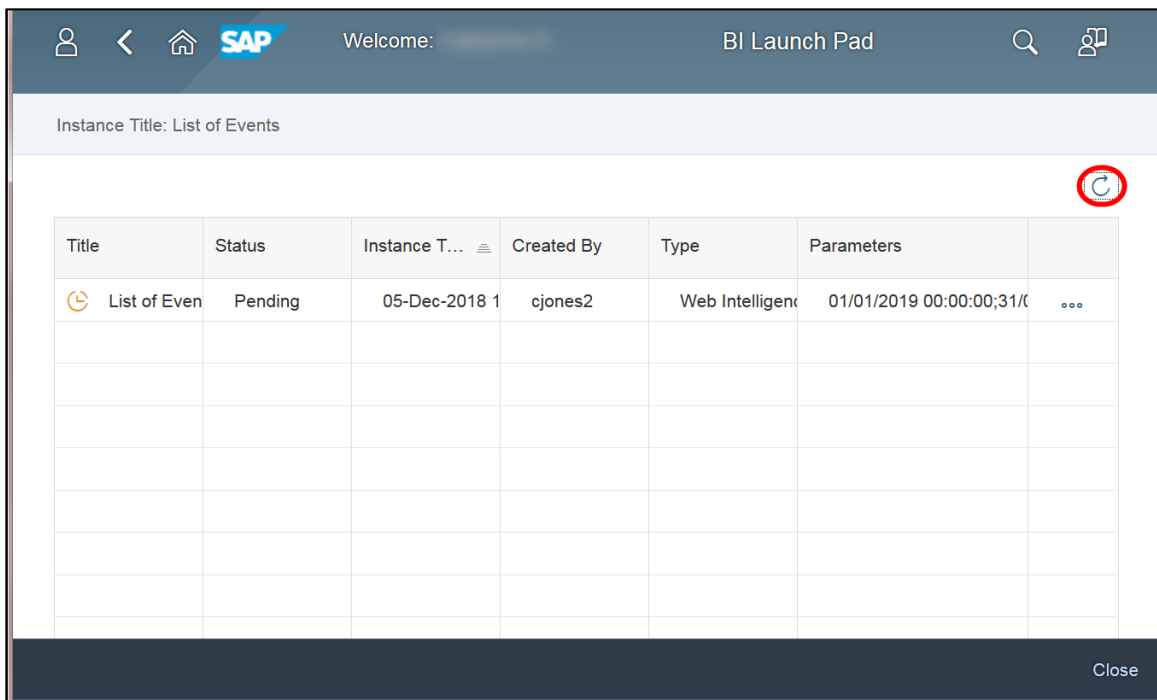
You can use this option to send the scheduled instance to someone's BusinessObjects Inbox or email address. Note that if you send it to an email address you will need to change the format to Excel or PDF, as Web Intelligence documents cannot be opened outside BusinessObjects.


- Click the **Schedule** button in the bottom right of the Schedule dialogue window.

5.2 View a document's history

Each Webi document has a history of its scheduled instances.

- Open the **List of Events** document's **More** menu (three dot button) and choose **History**.
- Wait until the time you scheduled the document to run has passed. You should see the instance's **Status** change from **Pending** to **Running**, to **Success**. If this does not happen automatically, click the **Refresh** button at the top right.



Title	Status	Instance T...	Created By	Type	Parameters	
 List of Even	Pending	05-Dec-2018 1	cjones2	Web Intelligenc	01/01/2019 00:00:00;31/0	...

You can open a successfully run instance by selecting its title in the history. You can delete unneeded instances using their **More** button in the history.

- Close the **List of Events** document's **History** using the **Close** button at the bottom right.

5.4 Additional Exercises

Extra exercises to try if you have time.

- a) Find a Webi document in your Public Folders that you would like to schedule.
- b) Open the Scheduling window and use the Recurrence tab to set the schedule to run "Now".
- c) Use the scheduling Prompts tab to fill in any prompts that the document has.
- d) Use the scheduling Format tab to set the document format to Microsoft Excel.
- e) Use the scheduling Destination tab to send the document to your email address.
- f) Set the schedule to run.
- g) Open the Webi document's History to check if the schedule ran successfully.
- h) Check your email to see if the scheduled document has arrived.

6. Help Resources

The [Reporting + Analytics website](#) is the first place to look for answers to any SAP BusinessObjects question:

www.ed.ac.uk/is/reporting-analytics

The [Accessing Data](#) page lists the most popular data sources and provides a contact email for the content provider. You should contact the content provider directly to request access to a data source, report a problem with a document in a public folder, or to enquire about training for specific Web Intelligence documents.

The [BusinessObjects Training](#) page provides about other training resources, including:

- [Video tutorials and lecture recordings on Media Hopper](#)
- The “SAP BusinessObjects Advanced: Editing and creating Web Intelligence documents using the Classic Launchpad” classroom course and workbook (book via [Event Booking](#))
- BusinessObjects Explorer videos and workbook (coming soon)

The Information Portal contains links to all the key information sources held within the University, including those in BusinessObjects:

<https://www.wiki.ed.ac.uk/x/YAAoD>