# BusinessObjects 4.3 - Function Changes (Design Mode)

## Overview

This document provides a guide to locating BusinessObjects (BO) 4.2 functions when working on a report in Design mode in the upgraded BO 4.3 environment. It lists all of the BO 4.2 toolbars and contextual menus, and explains where each item is in BO 4.3. You can use the **Contents** to jump to a specific toolbar or menu.

This is a detailed reference document intended to help users transition from BusinessObjects 4.2 to BusinessObjects 4.3. If you are looking for a high-level overview of BO 4.3 changes, see the Business Objects v4.3 Overview of Changes (BusObj43_OverviewofChanges.html). If you are new to BusinessObjects or looking for instructions on how to perform specific BusinessObjects functions, see the BusinessObjects Resources (BusObj43Resources.html) document.

**Reading mode:** If you are working on reports in Reading mode, a BusinessObjects 4.3 - Function Changes (Reading Mode) (BusObj43_WhereIsReading.html) document is available.

## Contents

**Screenshots:** ON


**Toolbar - File Tab**

New • Open • Save/Save As • Print • Find • History • Export • Send To • Undo/Redo • Cut/Copy/Paste • Remove • Edit Data Provider • Refresh

**Toolbar - Properties Tab**

View drop-down list (Filter Bar, Outline, Formula Bar, Side Panel, Report Tabs, Status Bar) • Document • Application

**Toolbar - Report Elements Tab**

Tables Tab • Cell Tab • Section Tab • Comment Tab • Chart Tab • Tools Tab • Position Tab • Linking Tab • Table Layout Tab • Behaviors/Cell Behaviors/Section Behaviors Tabs • Section Layout Tab

**Toolbar - Formatting Tab**

**Toolbar - Data Access Tab**

Data Providers Tab • Tools Tab • Data Objects Tab

**Toolbar - Analysis Tab**

Filters Tab • Data Tracking Tab • Display Tab • Conditional Tab • Interact Tab • Functions Tab

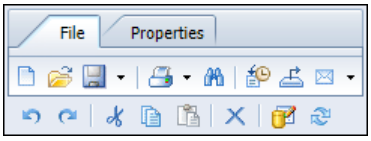
**Toolbar - Page Setup Tab**

Report, Report Name, Move Report Tabs • Page, Header, Footer, Scale to Page, Margins, Display Tabs

**Contextual Menus**

Report Contextual Menu • Section Contextual Menu • Table Contextual Menu • Cell Contextual Menu


## Toolbar - File Tab




*BO 4.2 Toolbar - File tab - Each function is listed below with an explanation of its BO 4.3 location.*

### New

From **BI Launch Pad**, click **Web Intelligence**.

## Open

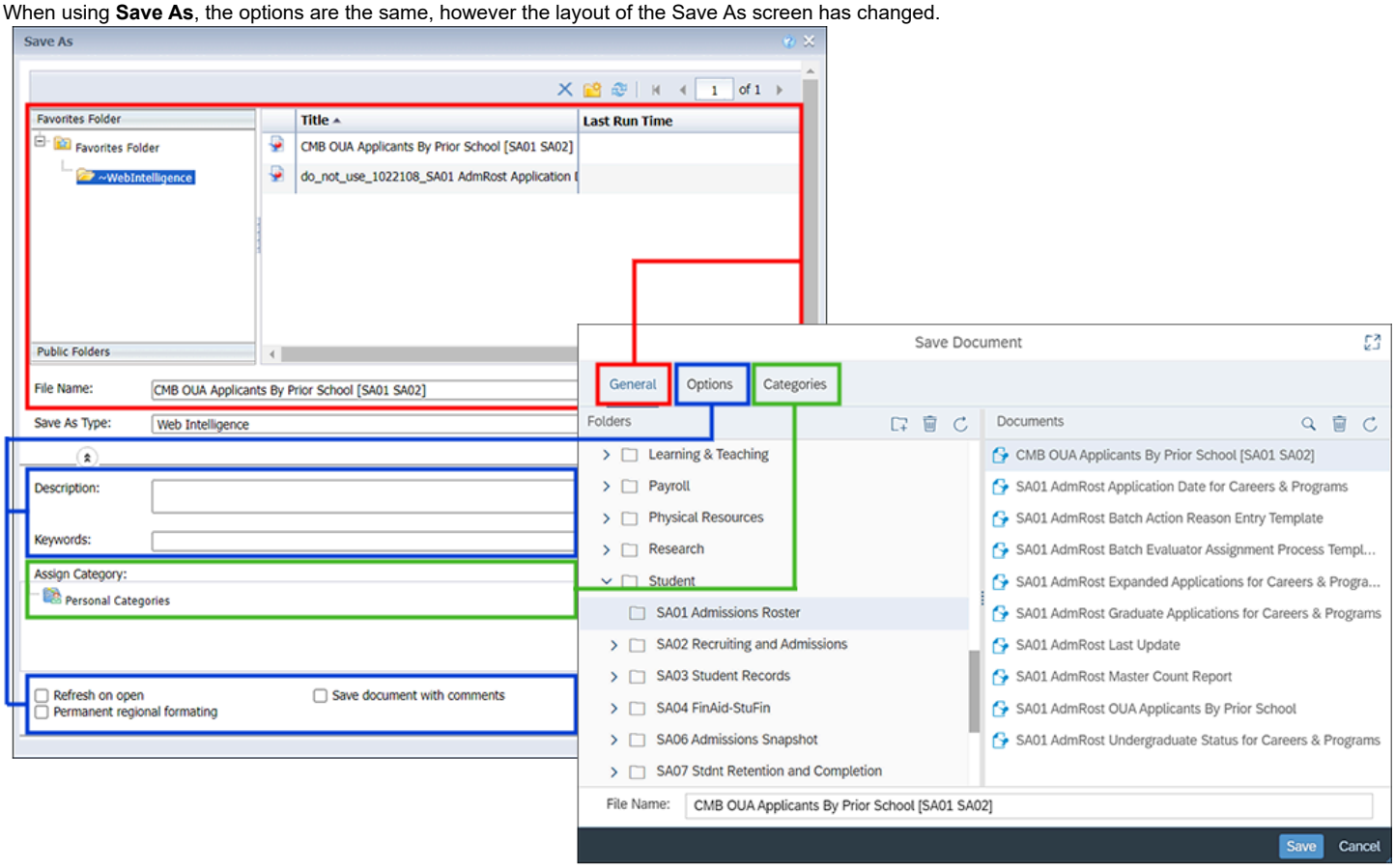
From **BI Launch Pad**, navigate to the report and open it.

## Save / Save As

On toolbar - File > **Save** or **Save As**.

The image below shows where **Save** and **Save As** are on the toolbar:

When using **Save As**, the options are the same, however the layout of the Save As screen has changed.

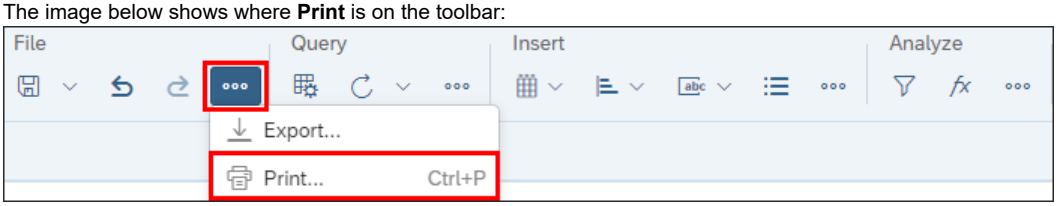



BO 4.3 divides the **Save As** options into three separate tabs, compared to all options being on one screen in BO 4.2. The folder structure and file name fields are on the **General** tab. The description, key words, and setting checkboxes are on the **Options** tab. The Assign Categories selection is on the **Categories** tab.

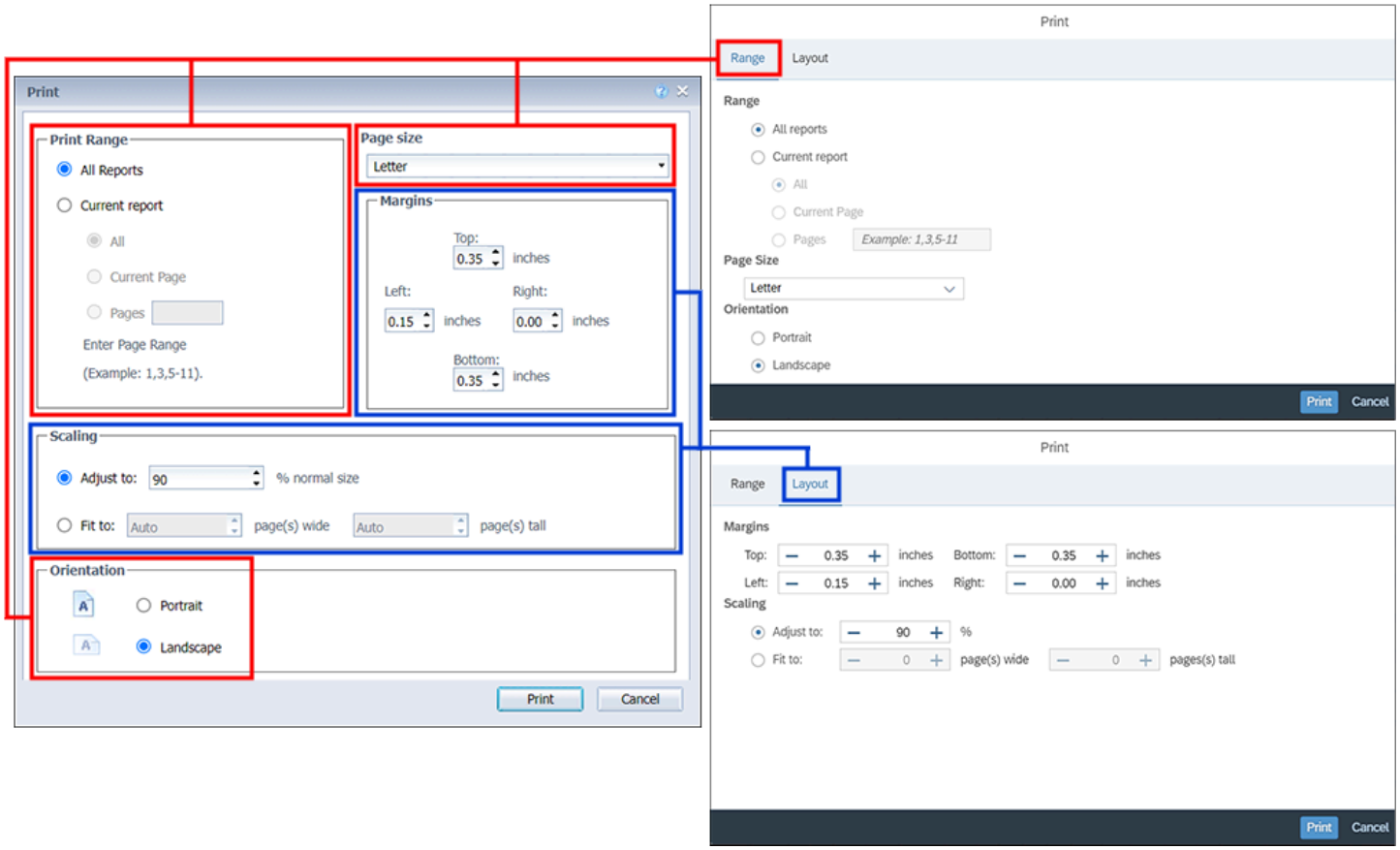
## Print

On toolbar - File > More > **Print**.

The image below shows where **Print** is on the toolbar:




When using **Print**, the options are the same, however the layout of the Print screen is different.



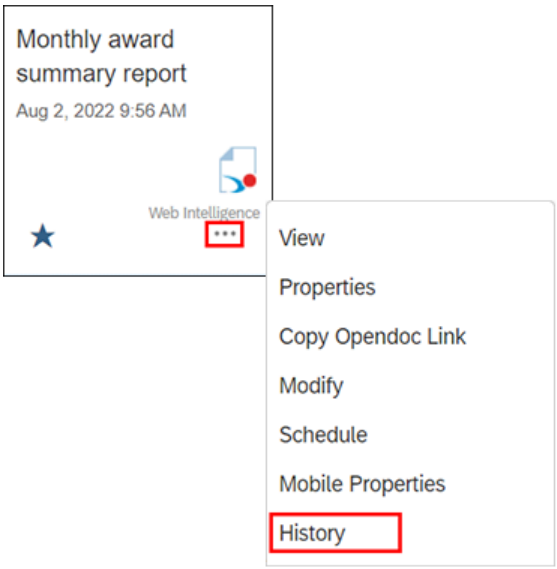

BO 4.3 divides the **Print** options into two screens. The Print Range, Page Size, and Orientation options are on the **Range** tab. The Margins and Scaling options are on the **Layout** tab.

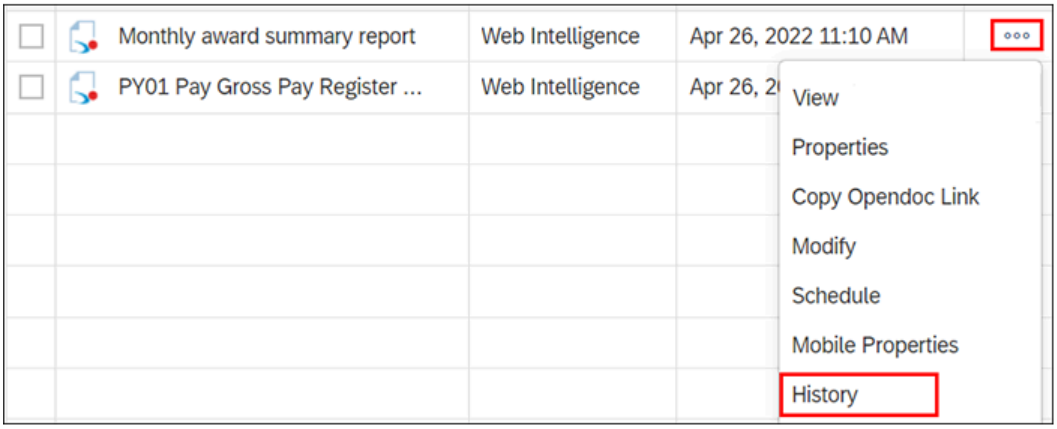
## Find

Use browser's Find function.

## History

From **BI Launch Pad**, navigate to the document, click More > **History**.



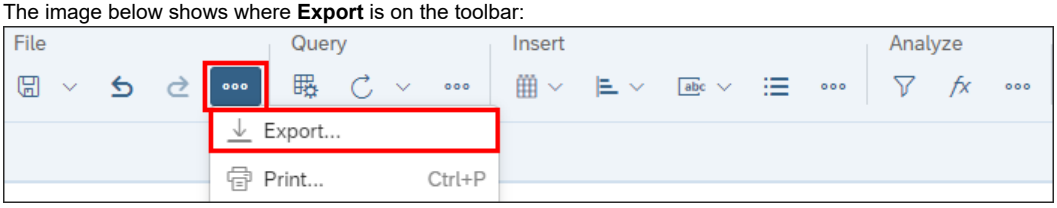




The image above shows the two different ways to access a report's **History**. If there is a tile available for the report, click the three-dot menu and select **History**. If you are viewing reports in a grid format, click the three-dot menu on the report row and select **History**.

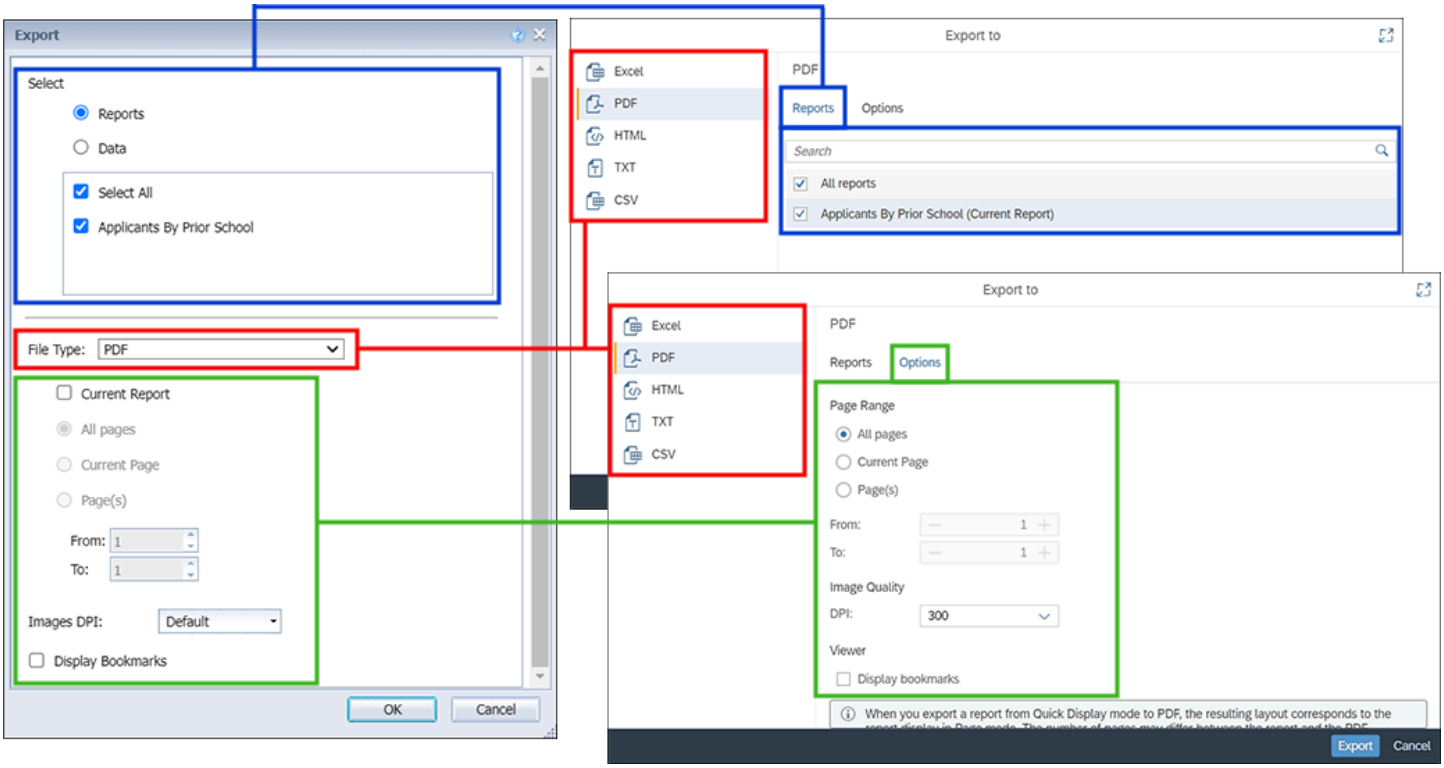
## Export

On toolbar - File > More > **Export**.

The image below shows where **Export** is on the toolbar:




BO 4.3 has removed the Excel .xls option and added an HTML option; other options remain the same. The layout of the Export screen is different.

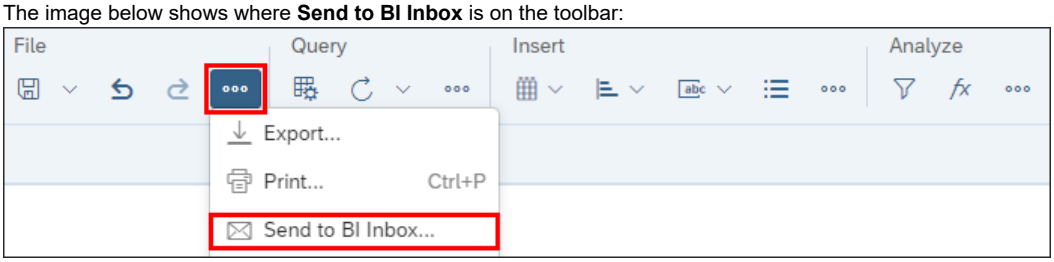



The **Export** screen in BO 4.3 has been redesigned. The file export formats are in a left-hand panel rather than a drop-down list. Once a format is chosed, the report selection is on the **Reports** tab. The various settings related to the chosen file format, such as page range, are on the **Options** tab.

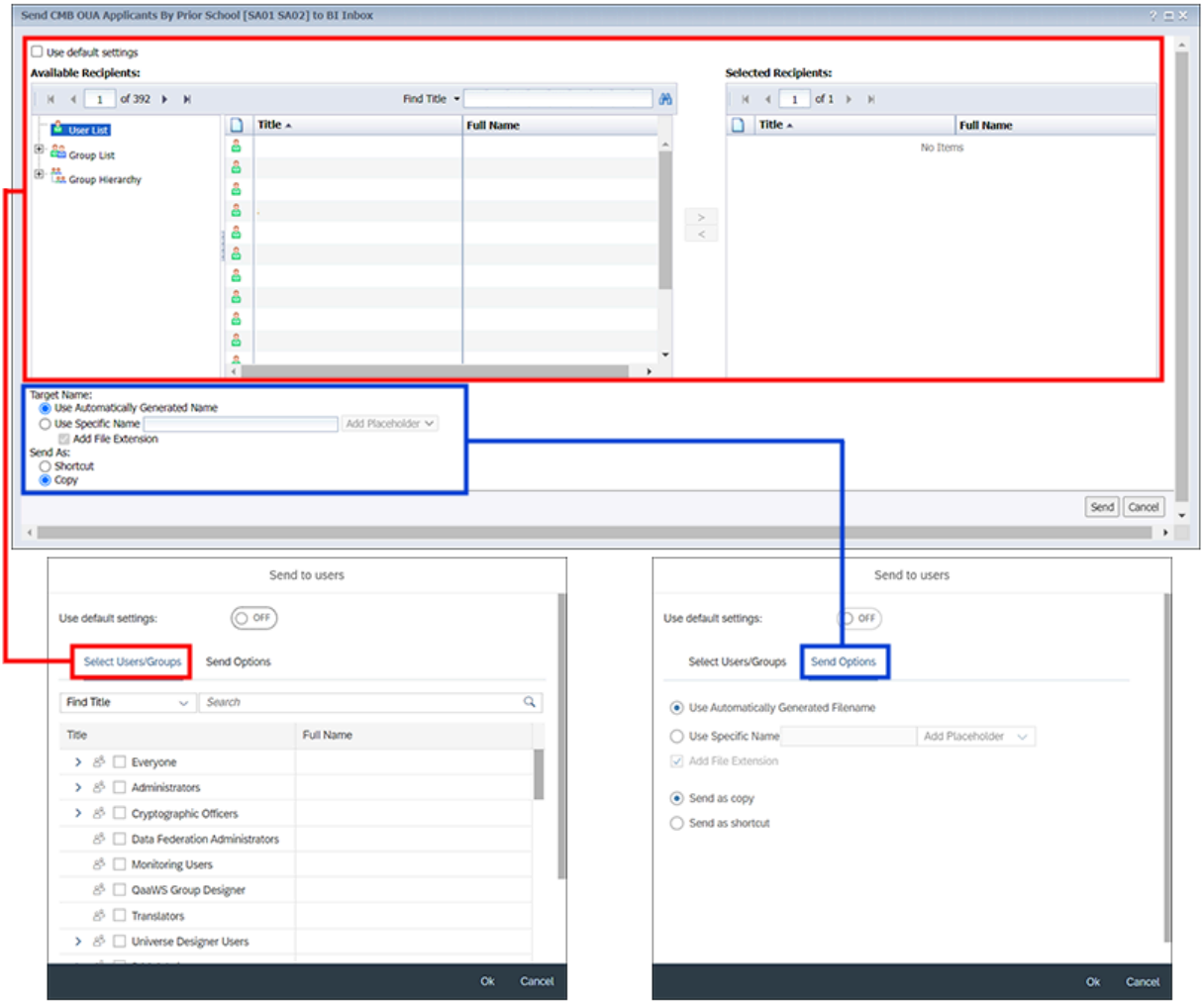
## Send To

On toolbar - File > More > **Send to BI Inbox**.

The image below shows where **Send to BI Inbox** is on the toolbar:




There are no longer mail and FTP options. The interface has changed both in how individuals are selected (BO 4.3 uses checkboxes) and how options are displayed.

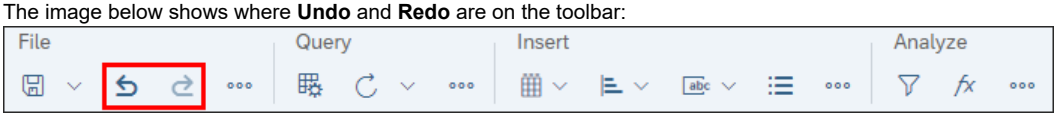



The screen for sending a report to a BI Inbox has been redesigned. You search for and select users on the **Select Users/Groups** tab in BO 4.3. As with similar selection screens, the move arrows have been replaced with checkboxes. The options for setting a target name and the type of file to send (copy or shortcut) are now on the **Send Options** tab.

## Undo / Redo

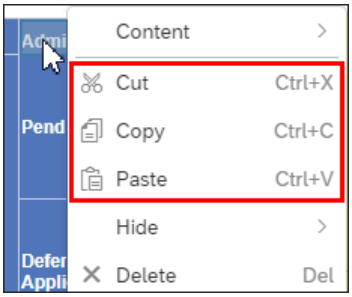
On toolbar - File > **Undo** and File > **Redo**.

The image below shows where **Undo** and **Redo** are on the toolbar:




## Cut / Copy / Paste

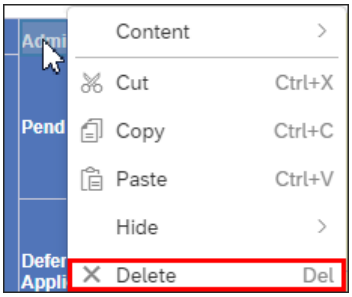
Use standard keyboard shortcuts or select from a contextual menu.




The image above shows the contextual menu when a data cell is selected. The menu differs based on the selected element; however, if available, Cut, Copy and Paste are still near the top of each contextual menu.

## Remove

Use keyboard's Delete button or select from a contextual menu.

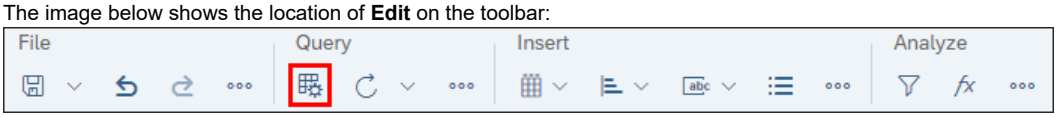



The image above shows the contextual menu when a data cell is selected. The menu differs based on the selected element; however Delete is still near the top of each contextual menu.

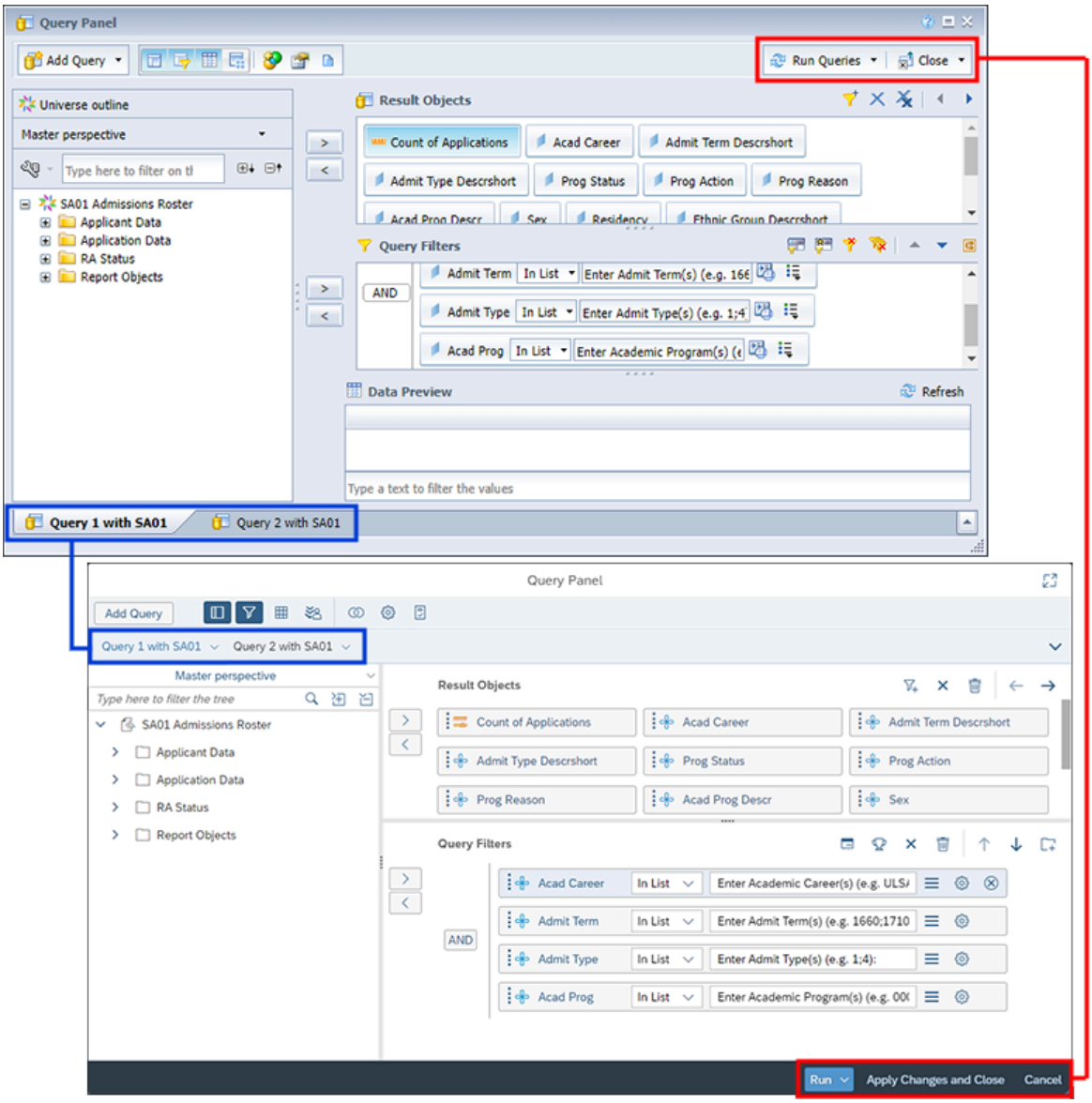
## Edit Data Provider

On toolbar - Query > **Edit** .

The image below shows the location of **Edit** on the toolbar:




The **Query Panel** that displays is the same as in BO 4.2 with the exception of button and tab locations.







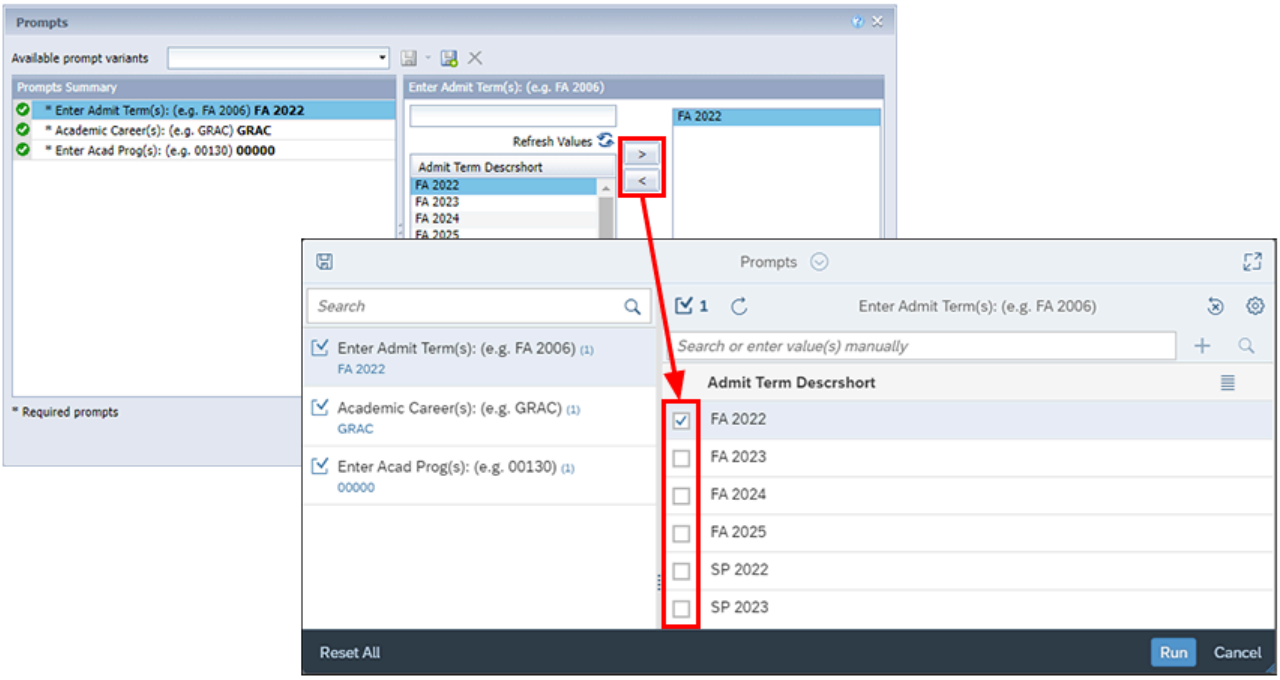
There are minor differences between the **Query Panel** screens. In BO 4.3, the buttons for **Run**, **Apply Changes and Close** (no longer under the **Close** drop-down list), and **Cancel** (replaces **Revert Changes and Close** option under the **Close** drop-down list) are at the bottom of the screen. If a report has multiple queries, they are listed near the top of the screen in BO 4.3.

## Refresh

On toolbar - Query > **Refresh** .

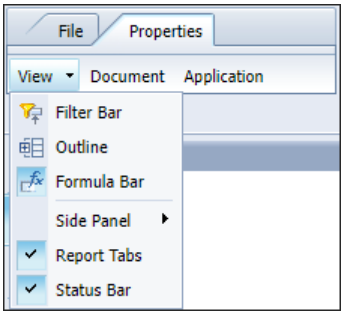
The image below shows the location of **Refresh** on the toolbar:

The drop-down list has options to refresh all the queries, or an Advanced refresh which allows for refresh of specific queries. The **Prompts** screen that displays has the same options but in a different interface.




The image above shows the look and feel difference between the BO 4.2 **Prompts** window and the BO 4.3 **Prompts** window. The highlighted areas show the change between using arrows to select values and using checkboxes.

# Toolbar - Properties Tab




*BO 4.2 Toolbar - Properties tab - Each function is listed below with an explanation of its BO 4.3 location.*

## View Drop-Down List

- **Filter Bar** - On toolbar - Analyze > **Filter Bar** .
  The image below shows the location of **Filter Bar** on the toolbar:

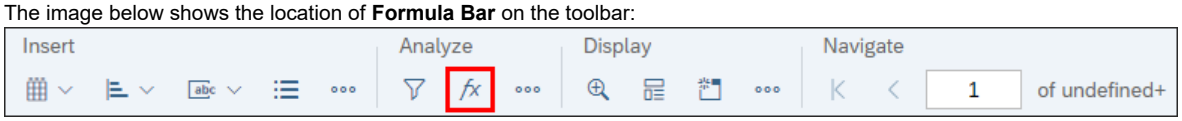
  

  The Filter Bar shows currently applied filters. BO 4.3 does not have the option to add simple report filters from the Filter Bar. Filters are added from the Properties panel.

- **Outline** - On toolbar - Display > More > **Fold/Unfold**.
  The image below shows the location of **Fold/Unfold** on the toolbar:

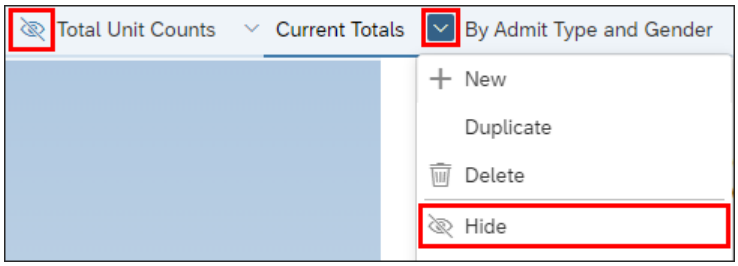
  

- **Formula Bar** - On toolbar - Analyze > **Formula Bar** .
  The image below shows the location of **Formula Bar** on the toolbar:

- **Side Panel** - **Main Panel** .
  The image below shows the location of the **Main Panel** icon which opens and closes the panel:

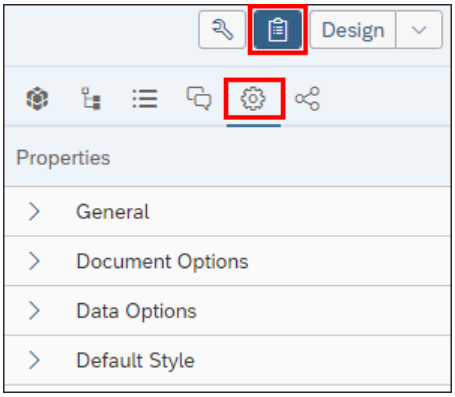
- **Report Tabs** - Select **Hide** from the drop-down list on the report tab.
  Individual report tabs can be hidden in BO 4.3 by selecting **Hide** from the drop-down list in the report tab. If a tab is hidden, it has the Hide icon next to its name:




- **Status Bar** - There is no status bar.

### Document

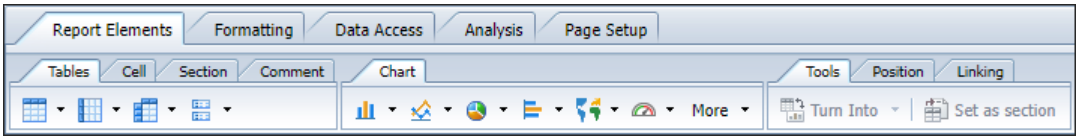
On **Main Panel** > **Show Document Properties** .




### Application (Measurement Unit setting)

In user preferences. From **BI Launch Pad**, click the circle with your initial in the upper-right corner, select **Settings**, and click the **Application Preferences** tab to change the Measurement Unit setting.

## Toolbar - Report Elements Tab

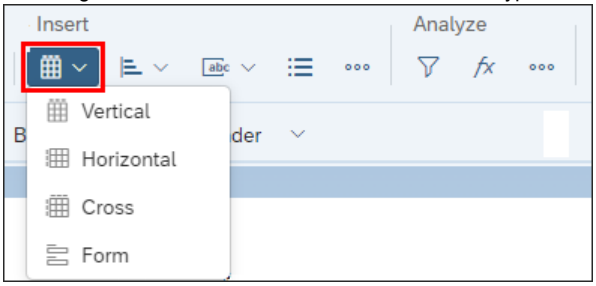



*BO 4.2 Toolbar - Report Elements tab - Each function is listed below with an explanation of its BO 4.3 location.*

### Tables Tab

**Define Vertical Table**, **Define Horizontal Table**, **Define Cross Table**, and **Define Form** - On toolbar - Insert > Insert Table > **Vertical/Horizontal/Cross/Form**.

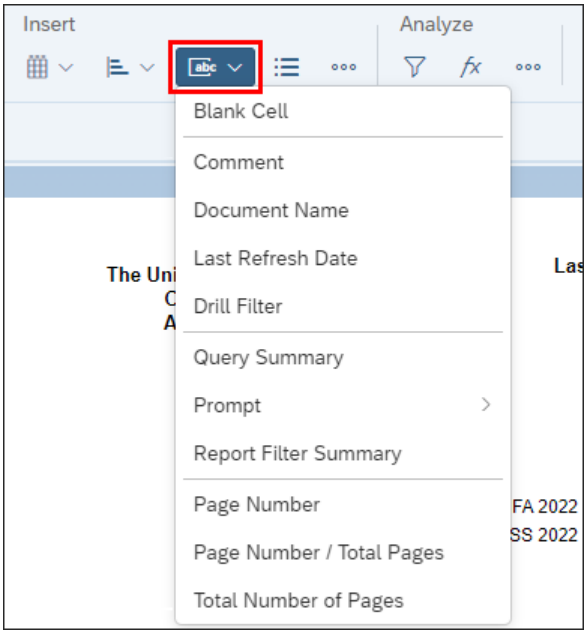
The image below shows the location of the four table types on the toolbar:



## Cell Tab Blank Pre-Defined

**Blank** and **Pre-defined** drop-down list - On toolbar - Insert > **Insert Cell** .

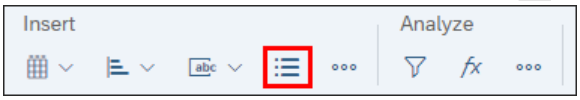
There is not a separate **Blank** button in BO 4.3. This is included in the pre-defined options in the **Insert Cell** drop-down list, as shown below:




## Section Tab Insert Section

On toolbar - Insert > **Insert Section** .

The image below shows the location of **Insert Section** on the toolbar:

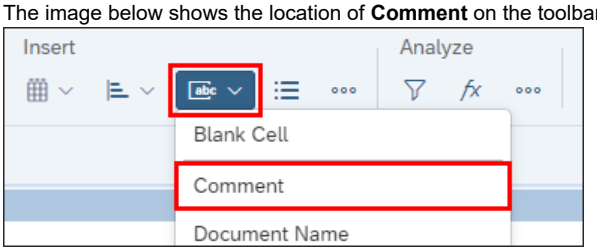



After clicking in the report to add a section, the **Define a New Section** window displays in BO 4.3. This was called the **Available Objects** window in BO 4.2, but it functions the same.

## Comment Tab Insert Comment Cell

On toolbar - Insert > Insert Cell > **Comment**.

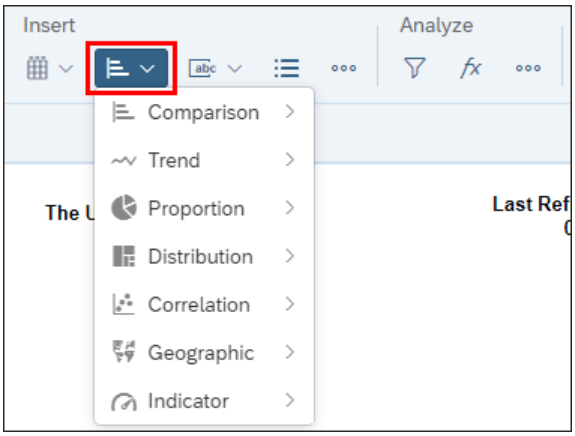
The image below shows the location of **Comment** on the toolbar:



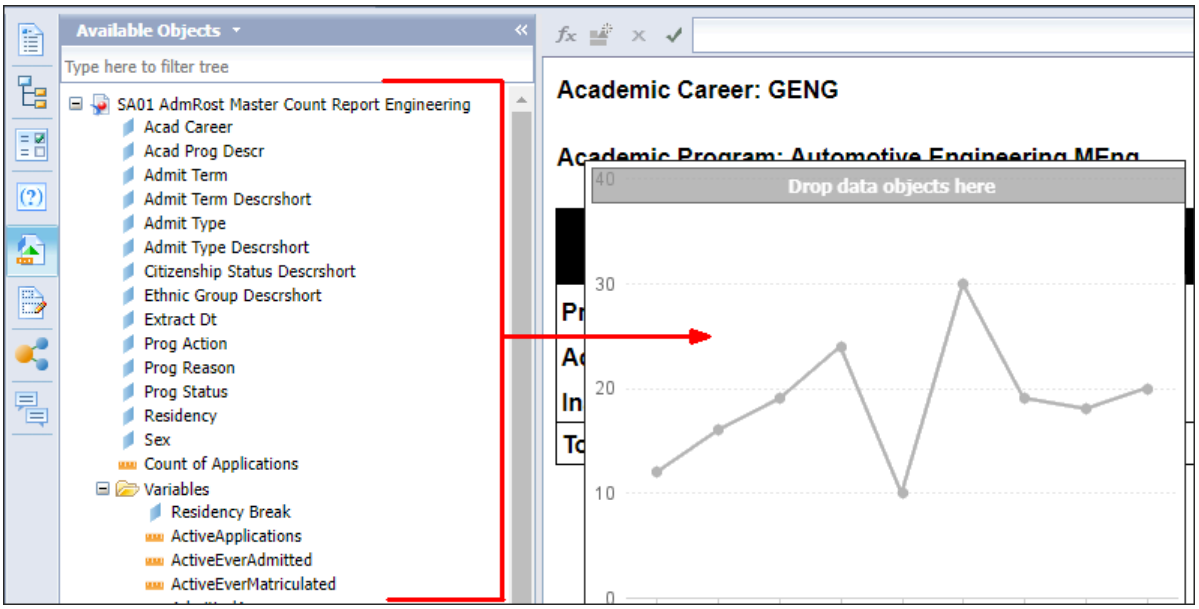

## Chart Tab

On toolbar - Insert > **Insert Chart** .

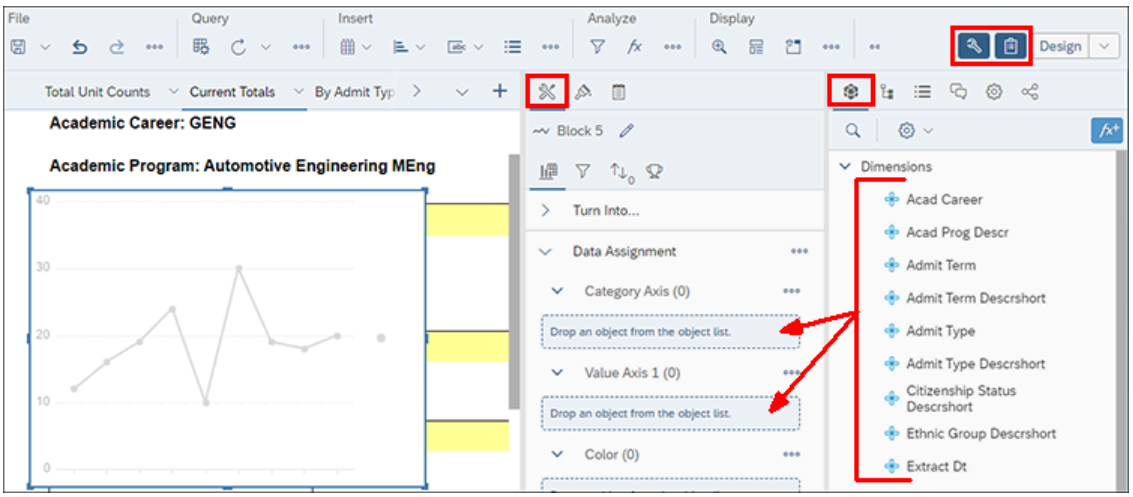
The image below shows the location of **Insert Chart** on the toolbar and the various chart options:




Once the chart is added to the report, the process of adding data has changed between BO 4.2, where objects are dragged into the chart, and BO 4.3, where objects are dragged between side panels.



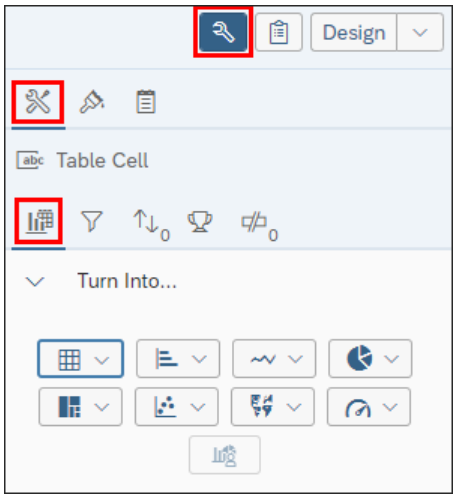

In BO 4.2, objects are dragged from the **Available Objects** sidebar and dropped directly onto the chart.



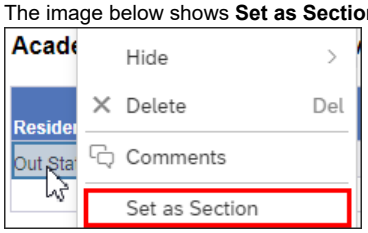

When a chart is added to a report in BO 4.3, the **Properties Panel** opens, showing the **Report Element Data**, which lists the individual parts of the chart. You need to open the Main Panel > **Document Objects**, then drag and drop the desired object into the appropriate place in the chart on the **Report Element Data** panel.

## Tools Tab Turn Into Set as section

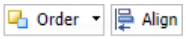
- **Turn Into** - On Properties Panel > Report Element Data > **Feeding Panel**:
  The image below shows the location of **Turn Into** on the Properties panel:



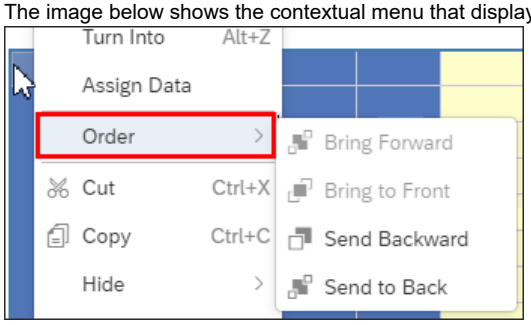

- **Set as section** - Right-click on cell and select **Set as Section**.
  The image below shows **Set as Section** as is displays in a cell's contextual menu:



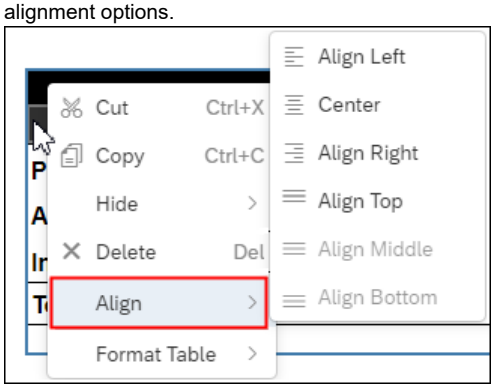

You can also use the **Insert Section** button in the **Insert** section of the toolbar. However, it does not automatically create the section based on the selected cell; you need to specify where the section is inserted and define the data.

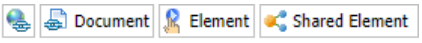
## Position Tab 


- **Order** - Right-click on element and select **Order**.
  The image below shows the contextual menu that displays when you right click on an element. Selecting **Order** displays the order options.

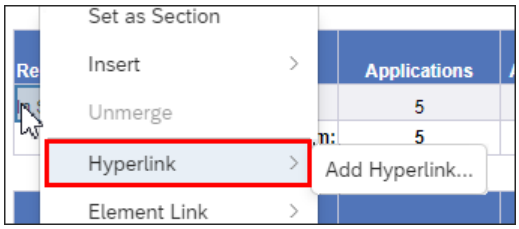



- **Align** - Right-click on elements and select **Align**.
  The image below shows the contextual menu that displays when you right click on multiple selected elements. Selecting **Align** displays the alignment options.




## Linking Tab 

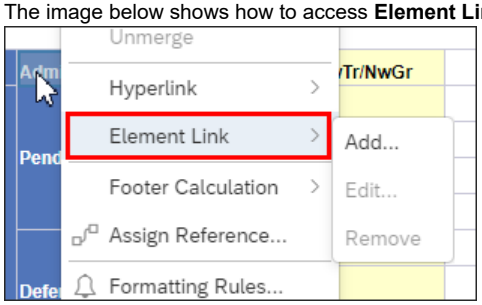

- **Linking / Document** - Right-click on element and select **Hyperlink**
  The image below shows the contextual menu that displays when you right click on an element. Selecting **Hyperlink** displays the **Add Hyperlink** option.



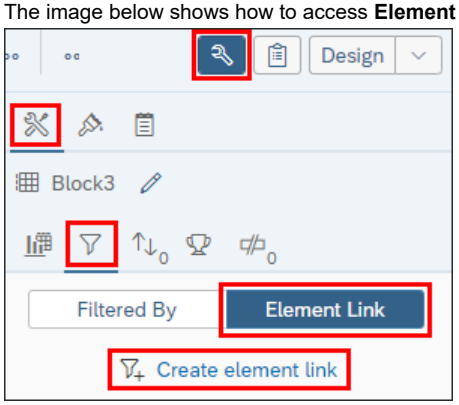

BO 4.3 does not have separate configuration windows for linking to web pages and documents. All settings are on a single window.

- **Element Link** - There are two options. 1. Right-click on element and select **Element Link** or 2. Properties panel > Report Element Data > Element Link

The image below shows how to access **Element Link** and its sub-options from a contextual menu:



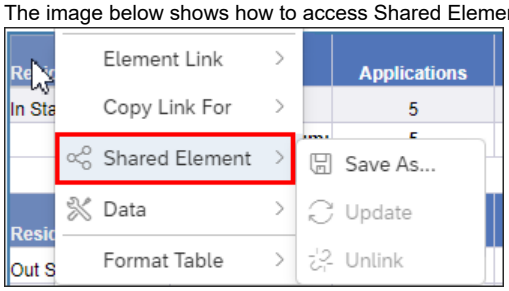

The image below shows how to access **Element Link** from the Properties panel:



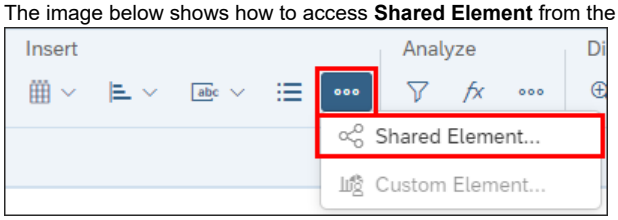

BO 4.2 uses a wizard to walk through creating an Element Link. All Element Link settings are on a single window in BO 4.3.

- **Shared Element** - There are two options. 1. Right-click on element and select Shared Element > **Save As...** or 2. On toolbar - Insert > More > **Shared Element**.

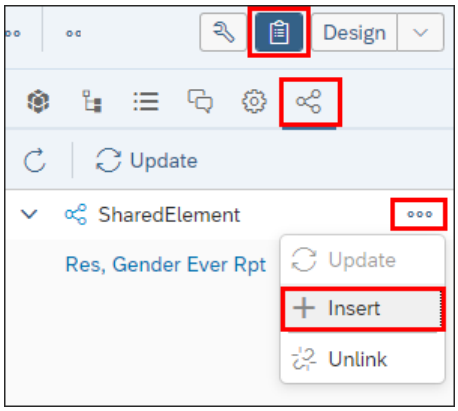
The image below shows how to access Shared Element > **Save As...** from a contextual menu:



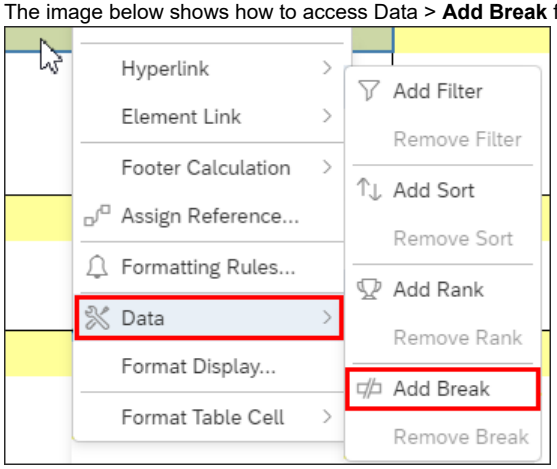
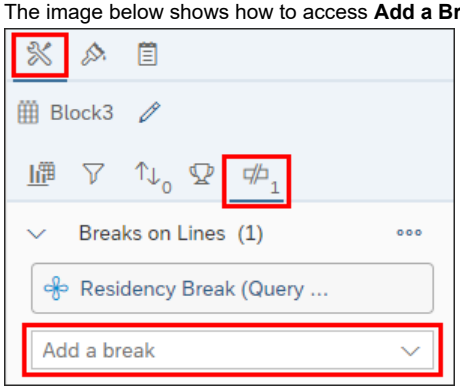
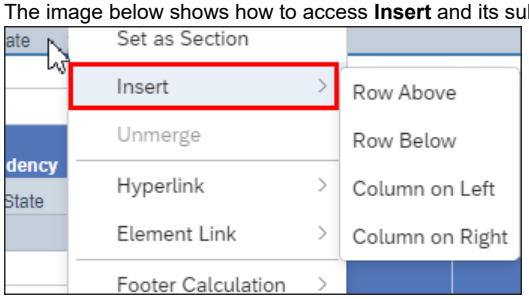

The image below shows how to access **Shared Element** from the toolbar:

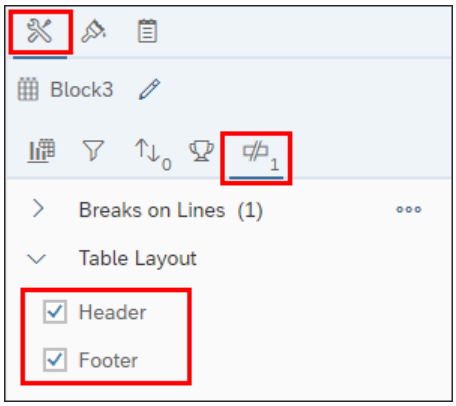



If an element has already been used in a document and needs to be inserted elsewhere in that document, use the Main Panel > **Shared Elements** Panel. Click the three-dot More menu and select **Insert**:

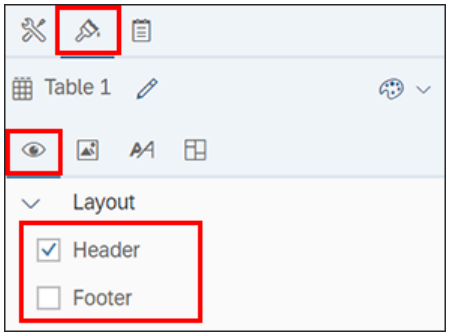



## Table Layout Tab Break Insert Header Footer

- **Break** - There are two options. 1. Right-click on element and select Data > **Add Break**, or 2. Properties panel > Report Element Data > **Break Panel**.
  The image below shows how to access Data > **Add Break** from a contextual menu:
  
  
  The image below shows how to access **Add a Break** from the **Break** Panel:
  
  
- **Insert**: Right-click on element and select **Insert**:
  The image below shows how to access **Insert** and its sub-choices from a contextual menu:
  
  
- **Header / Footer** - There are two options. 1. Properties Panel > Report Element Data > **Break Panel**, or 2. Properties Panel > Report Element Format > **Display Settings**.
  The image below shows how to access **Header** and **Footer** from the **Break Panel**:



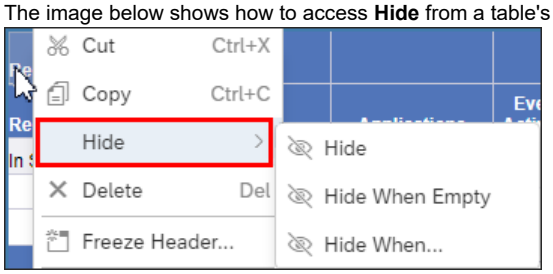

The image below shows how to access **Header** and **Footer** from the **Display Settings**:



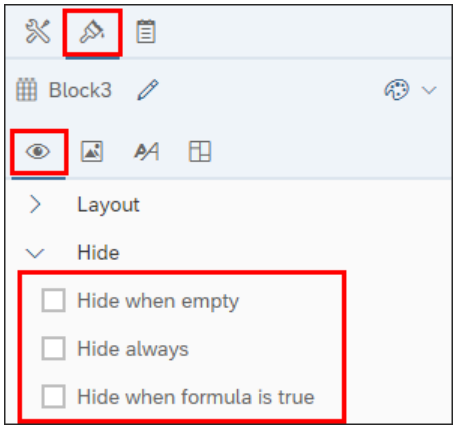

## Behaviors / Cell Behaviors / Section Behaviors Tabs

- **Hide (Table)** There are two options. 1. Right-click on table and select **Hide**, or 2. Properties Panel > Report Element Format > **Display Settings**.

  The image below shows how to access **Hide** from a table's contextual menu:

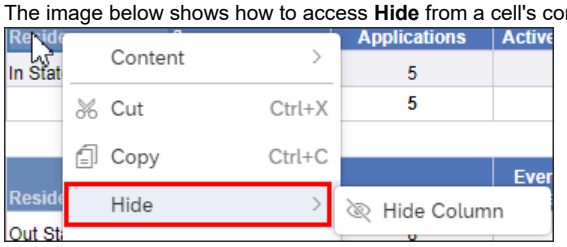



  The image below shows how to access **Hide** from the **Display Settings** panel:

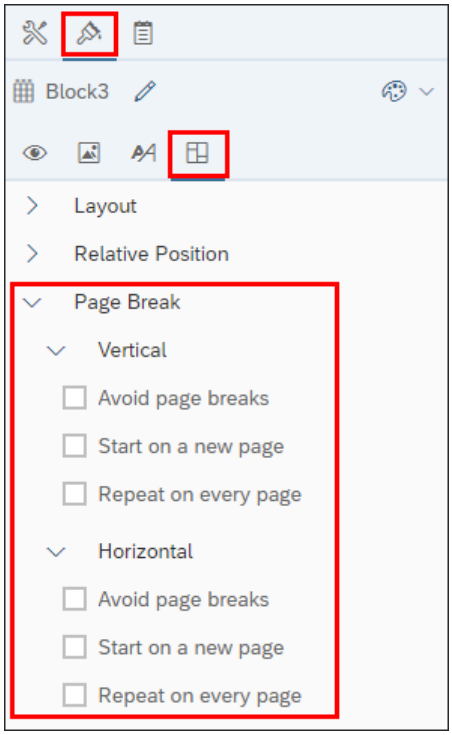



- **Hide (Column)** - Right-click on a cell and select Hide > **Hide Column**.

  The image below shows how to access **Hide** from a cell's contextual menu:



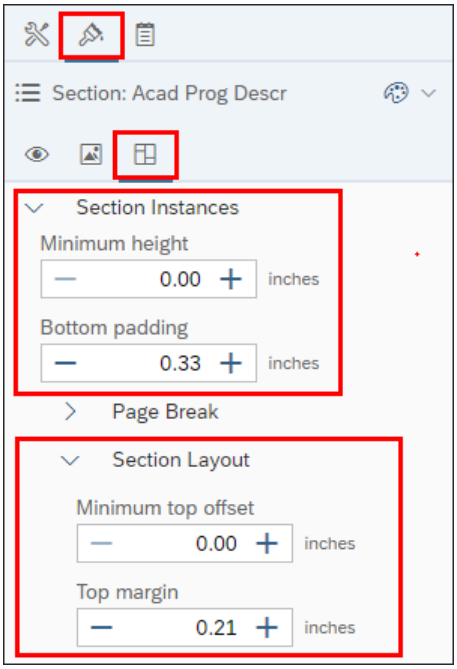
- **Page Break** / **Repeat** - On Properties Panel > Report Element Format > **Layout Settings**.
  The image below shows how to access **Page Break** and **Repeat** from the **Layout Settings** panel:



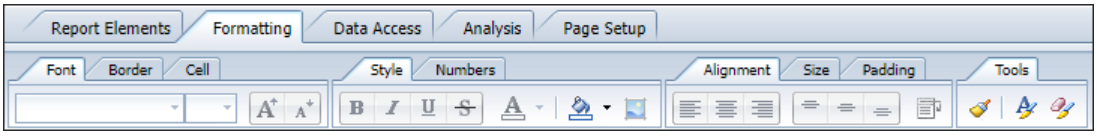

## Section Layout Tab

The **Minimum Height** setting is on Properties Panel > Report Element Format > **Layout Settings**.

The image below shows how to access the **Minimum Height** settings on the **Layout Settings** panel:



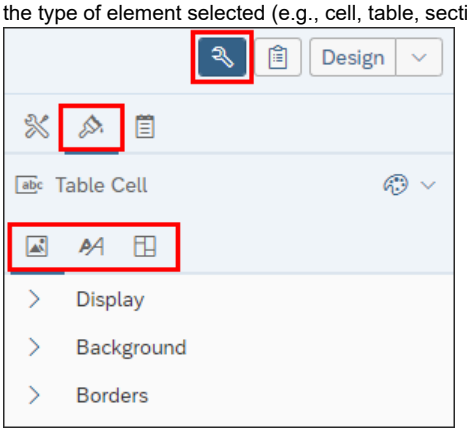

# Formatting Tab




*BO 4.2 Toolbar - Formatting tab*

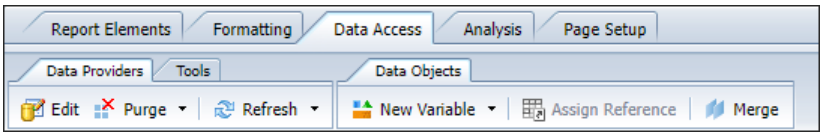
Formatting options are on Properties Panel > **Report Element Format** panel.

The image below shows the **Report Element Format** panel as it looks when a cell is selected. The sub-tabs and settings are different depending on the type of element selected (e.g., cell, table, section):




*When a cell is selected, as in this example, there are three tabs - **Appearance Settings**, **Text Settings**, and **Layout Settings**.*

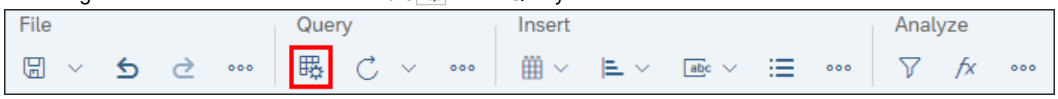
# Data Access Tab



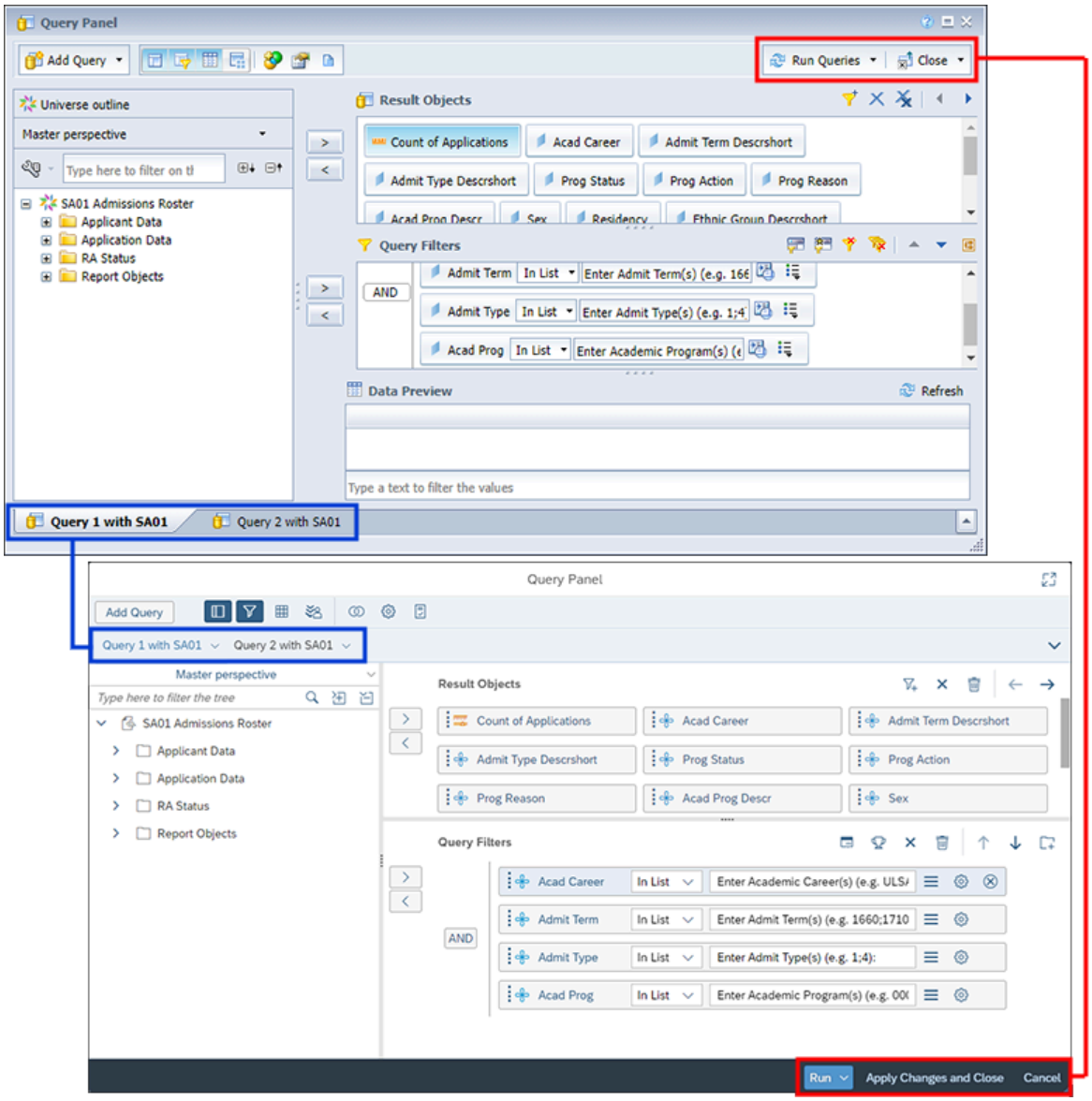

*BO 4.2 Toolbar - Data Access tab - Each function is listed below with an explanation of its BO 4.3 location.*

## Data Providers Tab Edit Purge Refresh

- **Edit** - On toolbar - Query > **Edit**.
  The image below shows the location of **Edit** in the Query section of the toolbar:

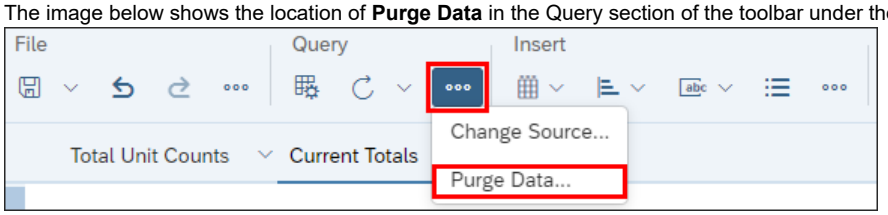
  
  

  The **Query Panel** that displays is the same as in BO 4.2 with the exception of button and tab locations.



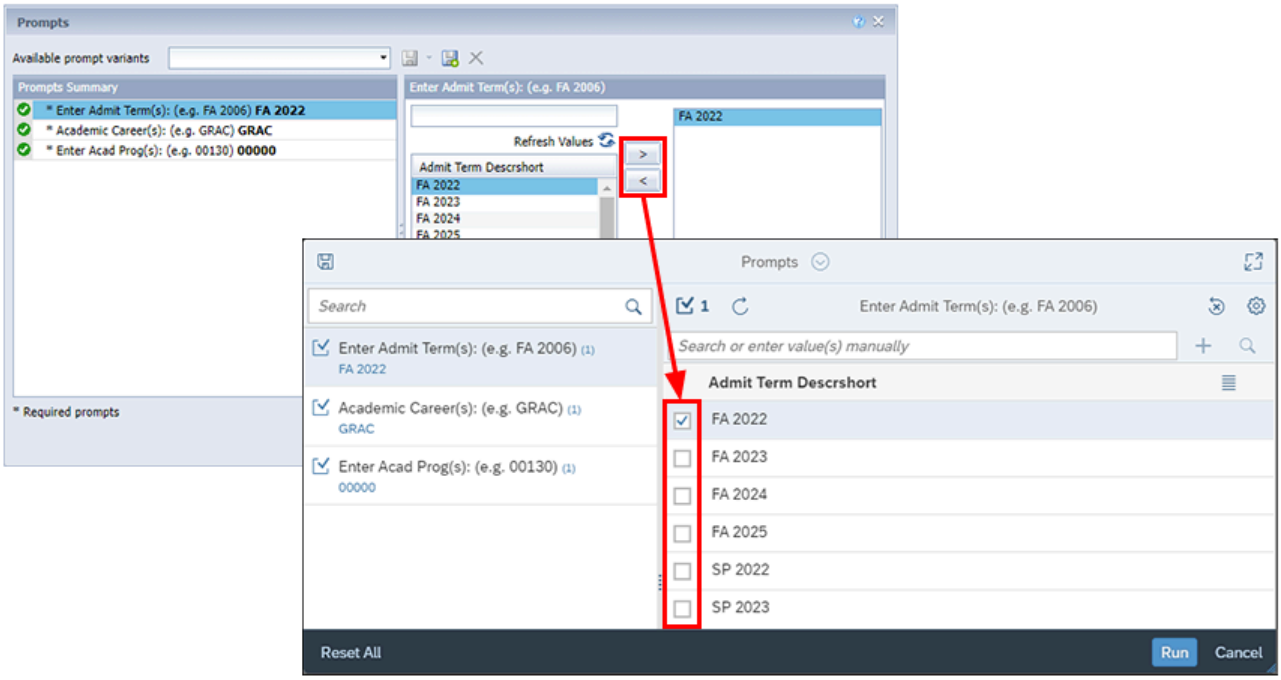

There are minor differences between the **Query Panel** screens. In BO 4.3, the buttons for **Run**, **Apply Changes and Close** (no longer under the **Close** drop-down list), and **Cancel** (replaces **Revert Changes and Close** option under the **Close** drop-down list) are at the bottom of the screen. If a report has multiple queries, they are listed near the top of the screen in BO 4.3.

- **Purge** - On toolbar - Query > More ooo > **Purge Data**.
  The image below shows the location of **Purge Data** in the Query section of the toolbar under the More ooo menu:




- **Refresh** - On toolbar - Query > **Refresh** .
  The image below shows the location of **Refresh** in the Query section of the toolbar:

The drop-down list has options to refresh all the queries, or an Advanced refresh which allows for refresh of specific queries. The **Prompts** screen that displays has the same options but in a different interface.

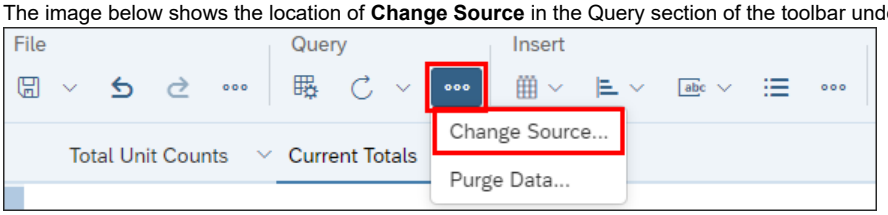



The image above shows the look and feel difference between the BO 4.2 **Prompts** window and the BO 4.3 **Prompts** window. The highlighted areas show the change between using arrows to select values and using checkboxes.

## Tools Tab Change Source

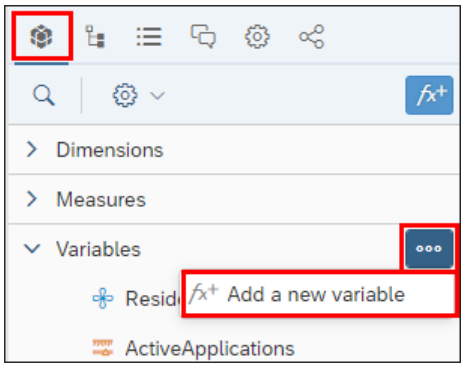
On toolbar - Query > More > **Change Source**.

The image below shows the location of **Change Source** in the Query section of the toolbar under the More menu:



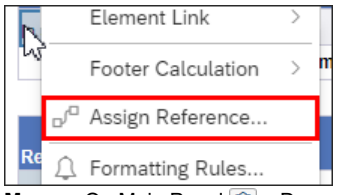

## Data Objects Tab New Variable Assign Reference Merge

- **New Variable** - There are two options. 1. Main Panel > Document Objects > More > **Add a new variable** or 2. **Create New Variable** on the Formula Bar.
  The image below shows where to add a new variable from the Document Objects panel :

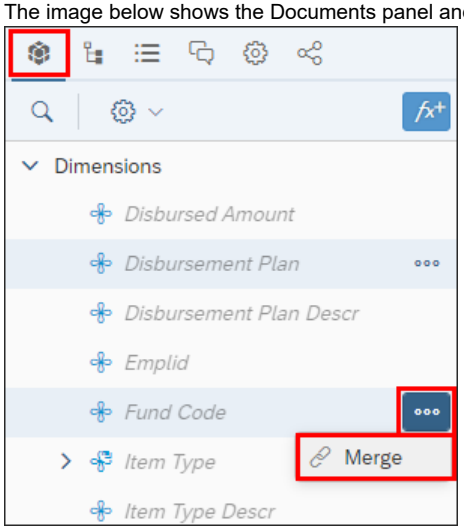



The image below shows **Create New Variable** on the Formula Bar. The Formula Bar can be toggled on and off by using **Formula Bar** in the Analyze section of the toolbar.

- **Assign Reference** - Right-click on the element and select **Assign Reference**.
  The image below shows how to access **Assign Reference** from a contextual menu:

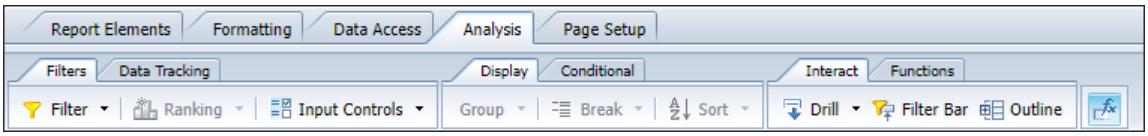



- **Merge** - On Main Panel > Document Objects panel. Select the dimensions being merged, click the More menu next to the last selected dimension, and click **Merge**.
  The image below shows the Documents panel and how you access **Merge** once multiple dimensions are selected.




  In this example, Disbursement Plan was selected, then while holding down Ctrl, Fund Code was selected. Since Fund Code was the last dimension selected, you use its More button to access **Merge**.

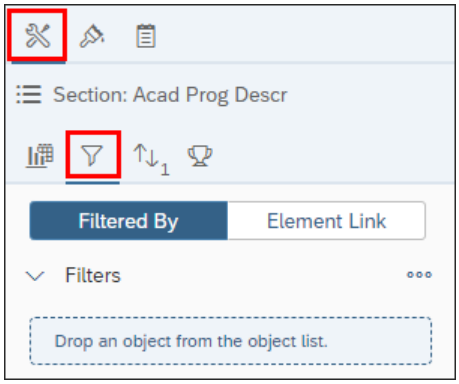
# Analysis Tab




*BO 4.2 Toolbar - Analysis tab - Each function is listed below with an explanation of its BO 4.3 location.*

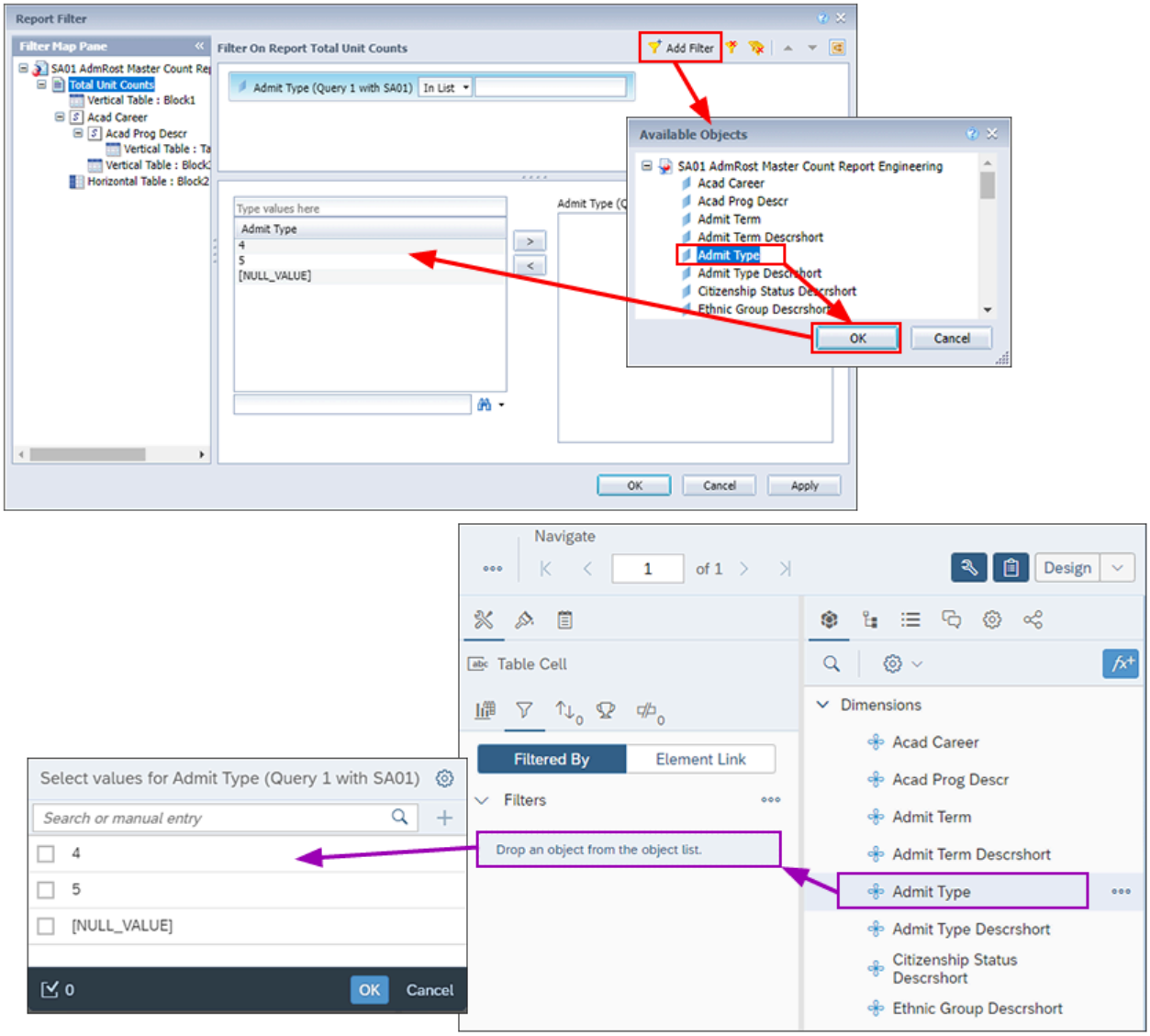
## Filters Tab Filter Ranking Input Controls

- **Filter**: On Properties Panel > Report Element Data > **Filter**.
  The image below shows how to access Filters on the **Filter** panel:




  NOTE: Filter is also available from the contextual menu by selecting Data > **Add Filter**, which opens the panel shown above.

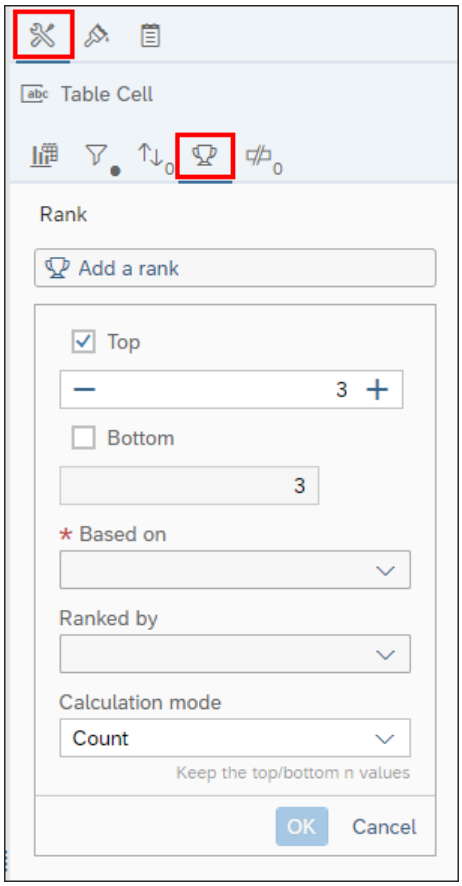
  A new filter is created in BO 4.3 by dragging the filter element from the Main Panel > **Document Objects** onto the **Filter** panel then configuring the data in the window that displays.




The image above shows the functionality difference between the BO 4.2 **Filters** window and the BO 4.3 **Filters** panel. In BO 4.2, you click **Add Filter**, select the filter element on the Available Objects window, click **OK**, and configure the data on the Report Filter window. In BO 4.3, the filter element is dragged from the Document Objects panel to the Filters panel. Once dropped onto the Filter panel, a configuration window displays.

- **Ranking** - On Properties Panel > Report Element Data > Ranking Panel .

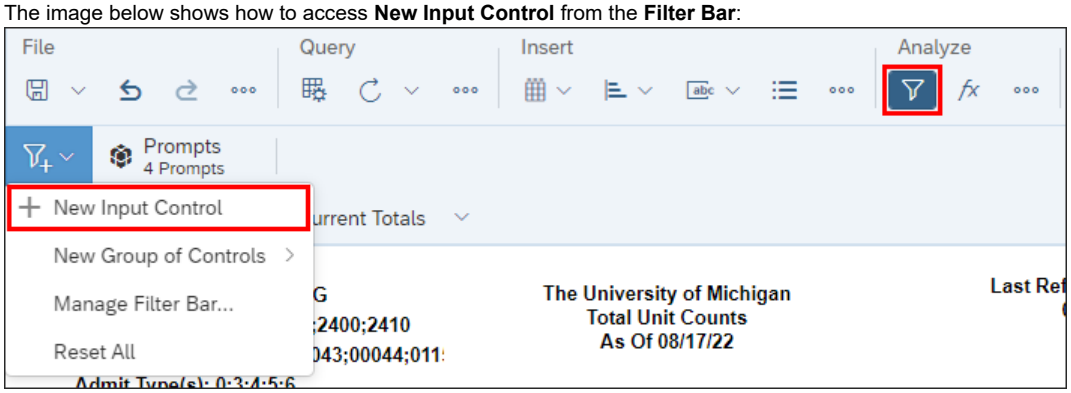
  The image below shows how to access Ranking on the **Ranking** panel :




NOTE: Rank is also available from the contextual menu by selecting Data > **Add Rank**, which opens the panel shown above.

- **Input Controls** - On the **Filter Bar**. Toggle the **Filter Bar** from the toolbar - Analyze > **Filter Bar** .

The image below shows how to access **New Input Control** from the **Filter Bar**:

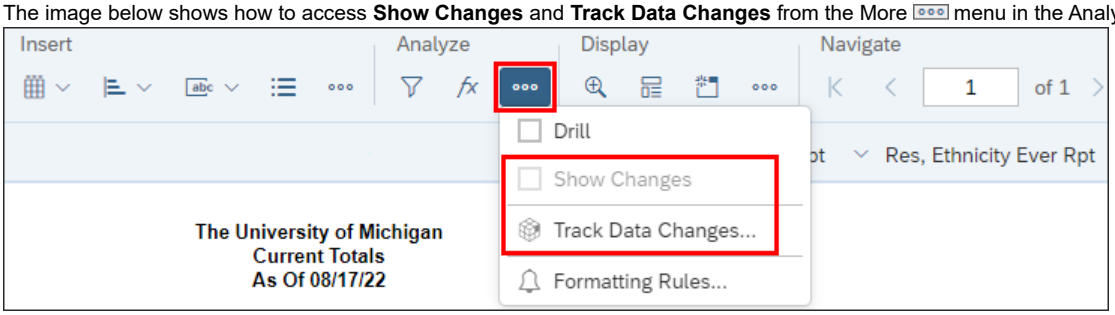



Input Controls in BO 4.3 are configured on a single window, rather than the multiple windows used in BO 4.2.

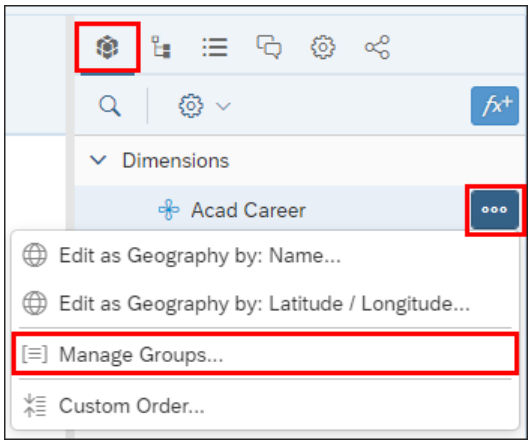
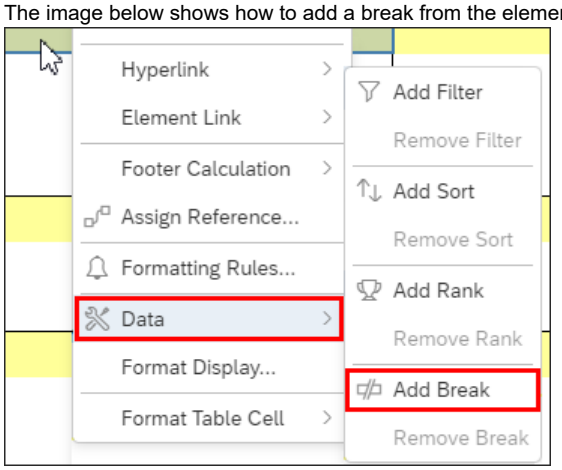
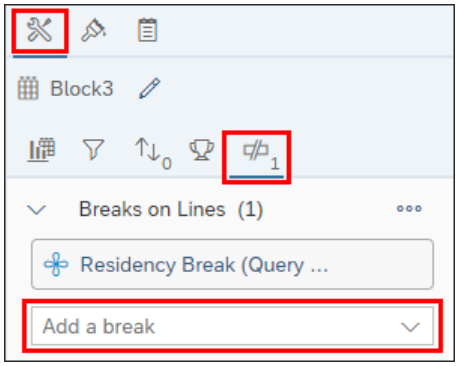
## Data Tracking Tab

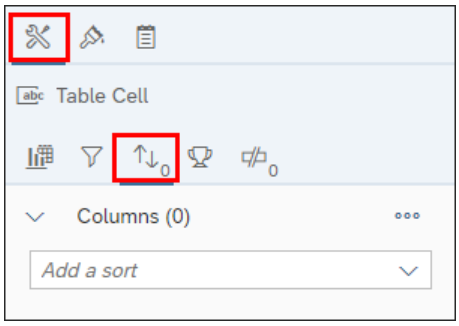
**Track** and **Show Changes** - On toolbar - Analyze > More > **Track Data Changes** and **Show Changes**.

The image below shows how to access **Show Changes** and **Track Data Changes** from the More menu in the Analyze section of the toolbar:



## Display Tab Group Break Sort

- **Group**: On Main Panel > Document Objects > More > **Manage Groups**.
  The image below shows how to access **Manage Groups** from the More menu next to an object on the **Document Objects** panel:
  
  
- **Break**: There are two options. 1. Right-click on an element and select Data > **Add Break** or 2. on the Properties Panel > Report Element Data > **Break** panel.
  The image below shows how to add a break from the element's contextual menu:
  
  
  The image below shows how to add a break from the the **Break** panel:
  
  
- **Sort**: On Properties Panel > Report Element Data > **Sort**.
  The image below shows how to add a sort from the **Sort** panel:

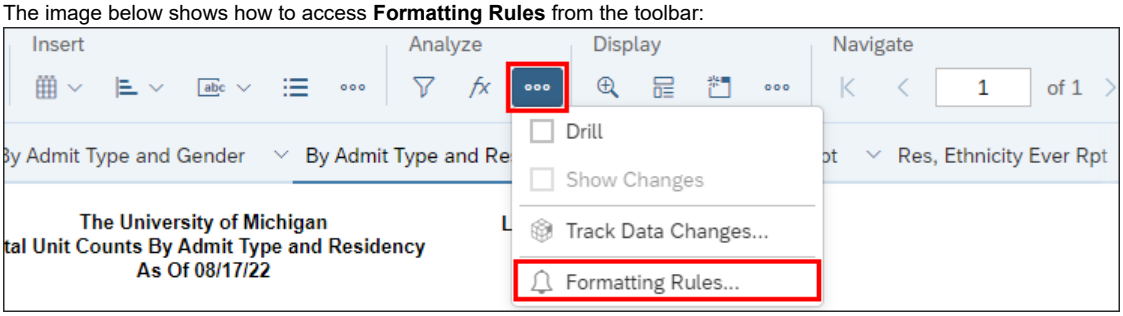



NOTE: Sort is also available from the contextual menu by selecting Data > **Add Sort**, which opens the panel shown above.

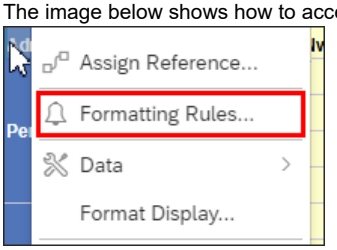
## Conditional Tab Formatting Rules New Rule...

**Formatting Rules** and **New Rule**: There are two options. 1. On toolbar - Analyze > More ooo > **Formatting Rules**, or 2. right-click on element and select **Formatting Rules**.

The image below shows how to access **Formatting Rules** from the toolbar:

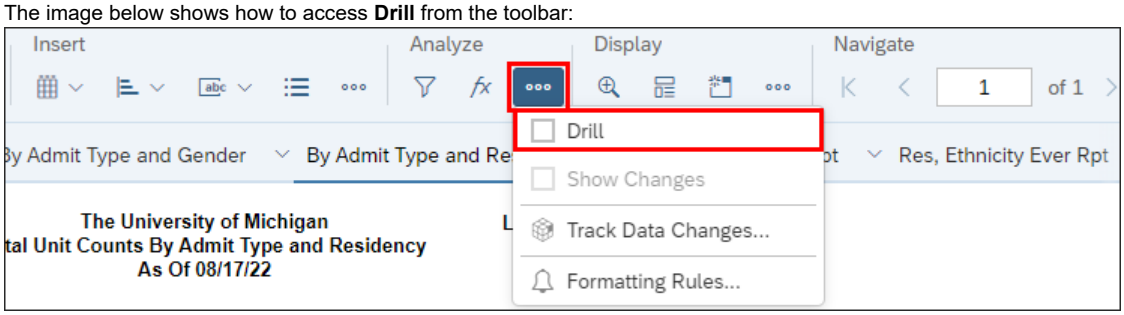



The image below shows how to access **Formatting Rules** from the element's contextual menu:

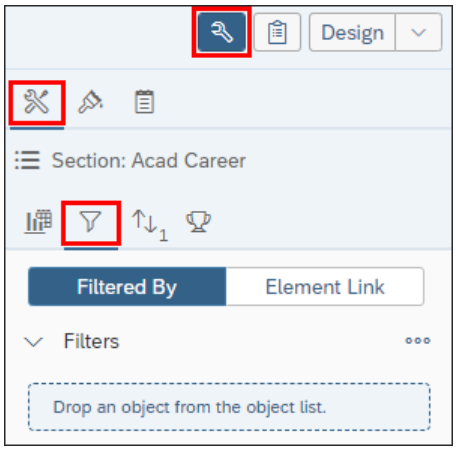



## Interact Tab Drill Filter Bar Outline

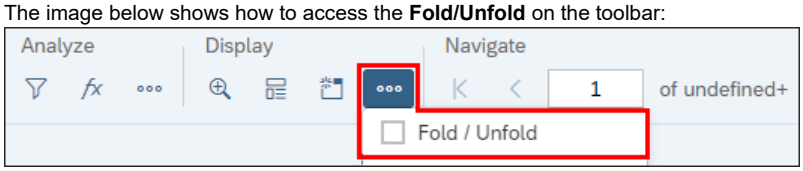
- **Drill**: On toolbar - Analyze > More ooo > **Drill**
  The image below shows how to access **Drill** from the toolbar:




- **Filter Bar**: On Properties Panel > Report Element Data > **Filter Bar** panel
  The image below shows how to access the **Filter** panel :



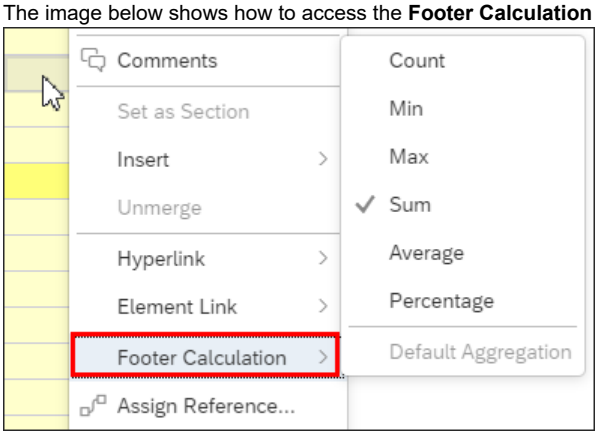

- **Outline**: On toolbar - Display > More ••• > **Fold/Unfold**.
  The image below shows how to access the **Fold/Unfold** on the toolbar:



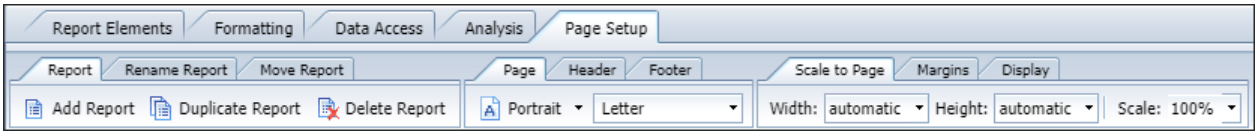

### Functions Tab Σ Sum Count More

Right-click on the cell and select **Footer Calculation** > desired option.

The image below shows how to access the **Footer Calculation** options on the cell contextual menu:




## Page Setup Tab

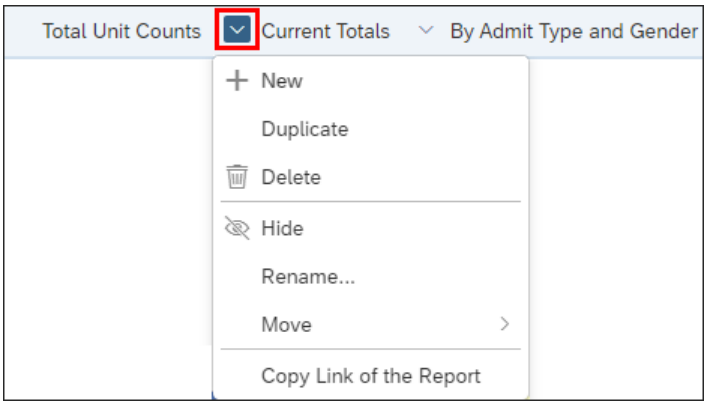



*BO 4.2 Toolbar - Page Setup tab - Each function is listed below with an explanation of its BO 4.3 location.*

### Report Tabs - Report, Report Name, Move Report

In the drop-down list next to the report's name.

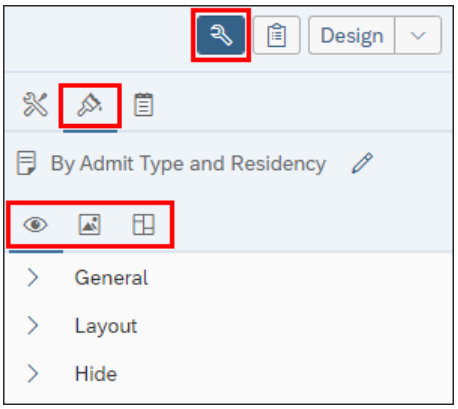
The image below shows how to access various report options from the drop-down list next to the report's name:




### Page, Header, Footer, Scale to Page, Margins, Display

On Properties Panel > Report Element Format > **Display Settings** panel, **Appearance Settings** panel and **Layout Settings** panel.

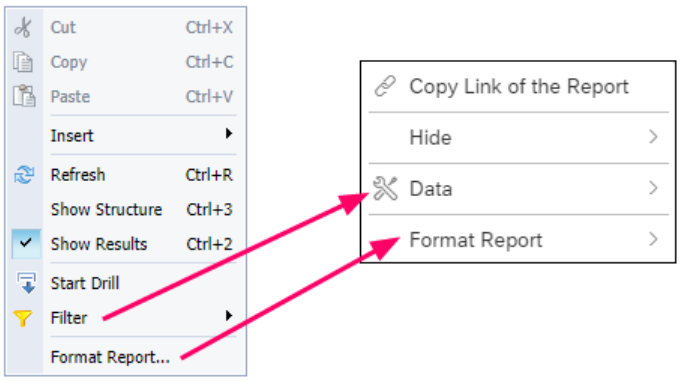
The image below shows the tabs on the Properties Panel that contain the report formatting options:




## Contextual Menus

Contextual menus are accessed by right-clicking on a report element. There are four main contextual menus which are based on the type of element selected - Report, Section, Table, and Cell. Each of these are listed below, with explanations of the differences between the 4.2 and 4.3 menus.

### Report Contextual Menu




Options changed from BO 4.2 to BO 4.3:

- **Cut**, **Copy**, **Paste** - Cut and copy options are not available from the menu in BO 4.3. Paste displays in the BO 4.3 menu if there is something on the clipboard that can be pasted.
- **Insert** - The elements to insert (e.g., table, report element, etc.) are accessed from the **Insert** section of the BO 4.3 toolbar.
- **Refresh** - Available on the BO 4.3 toolbar.
- **Show Structure** / **Show Results** - Available on Main Panel > **Show Report Structure**; since this is a panel in BO 4.3, the Show Results option is no longer needed.
- **Start Drill** - Available in the **More** menu in the **Analyze** section of the BO 4.3 toolbar.

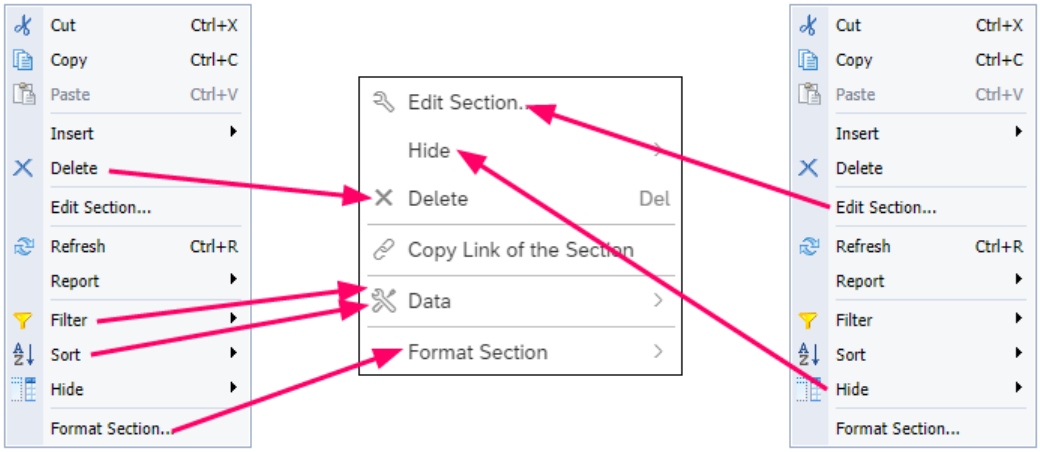
Options on both menus:

- **Filter** / **Data** - Filter is Data in BO 4.3.
- **Format Report**

New BO 4.3 option:

- **Copy Link of the Report**
- **Hide** - Hides the report.

## Section Contextual Menu




Options changed from BO 4.2 to BO 4.3:

- **Cut**, **Copy**, **Paste** - Cut and copy options are not available from the menu in BO 4.3. Paste displays in the BO 4.3 menu if there is something on the clipboard that can be pasted.
- **Insert** - The elements to insert (e.g., table, report element, etc.) are accessed from the **Insert** section of the BO 4.3 toolbar.
- **Refresh** - Available on the BO 4.3 toolbar.
- **Report** - There are several options under this selection in BO 4.2:
  - **Show Structure** / **Show Results** - Available on Main Panel > **Show Report Structure**; since this is a panel in BO 4.3, the Show Results option is no longer needed.
  - **Start Drill** / **Show Changes** - Available in the **More** menu in the **Analyze** section of the BO 4.3 toolbar.
  - **Format Report** - Available on Properties Panel > Report Element Format.

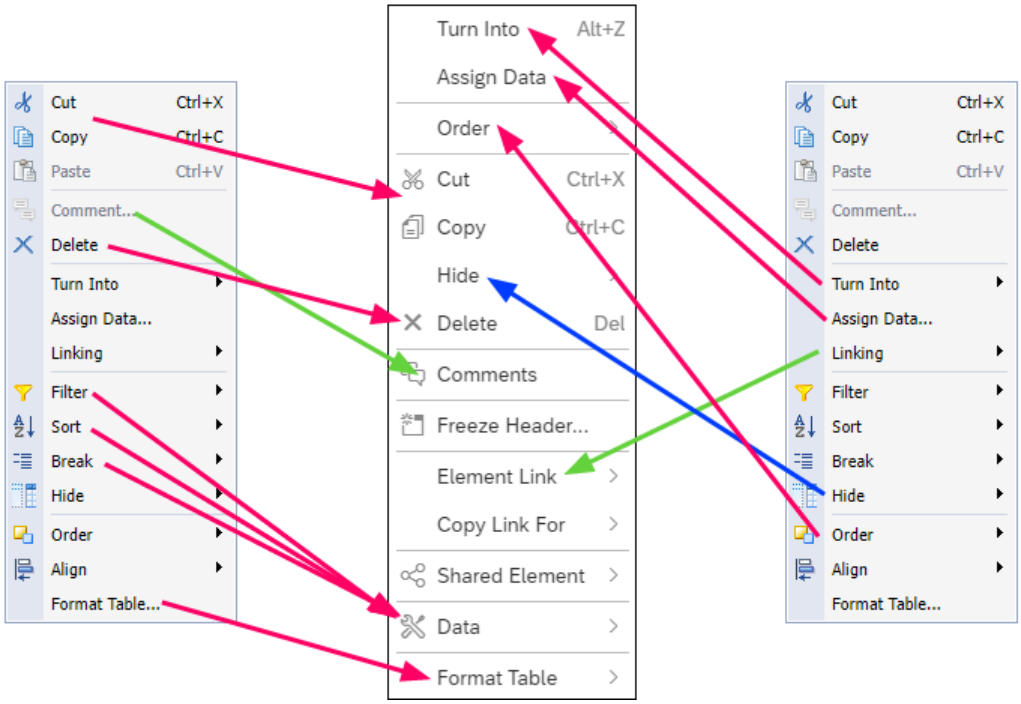
Options on both menus:

- **Delete**
- **Edit Section**
- **Filter** & **Sort** - Filter and Sort are under Data in BO 4.3.
- **Hide**
- **Format Section**

New BO 4.3 option:

- **Copy Link of the Section**

## Table Contextual Menu



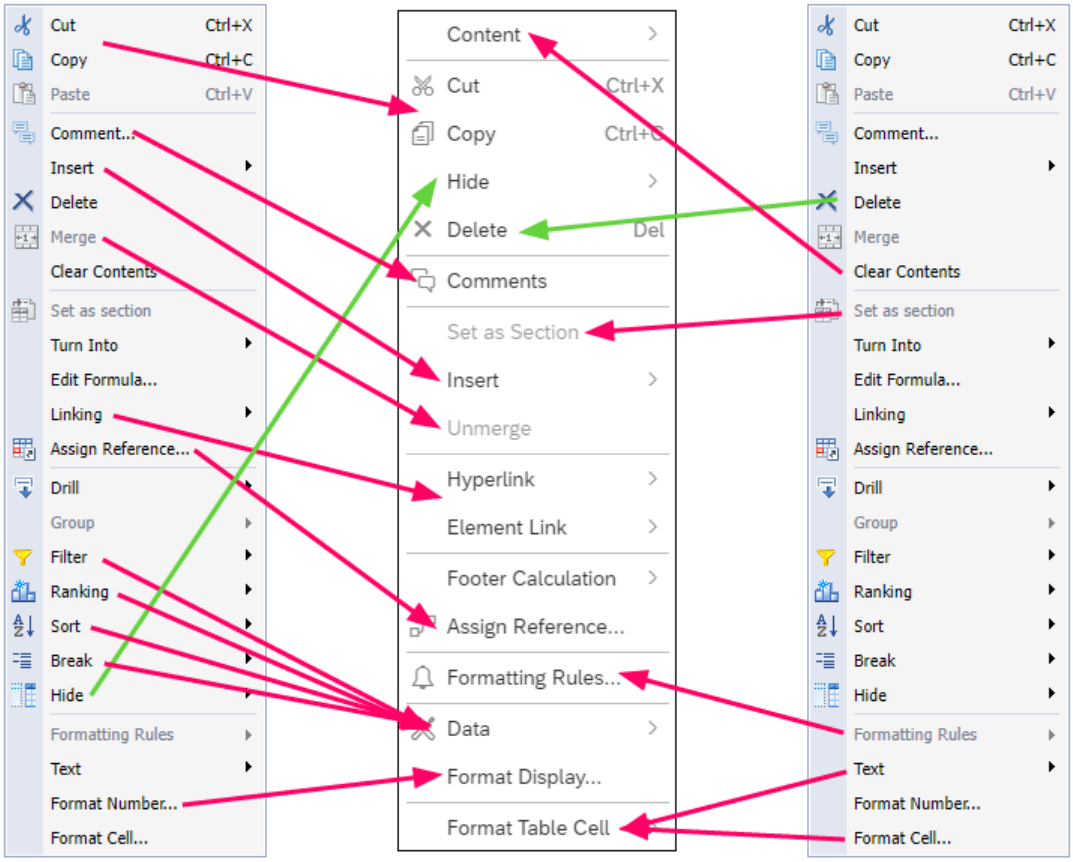

Options changed from BO 4.2 to BO 4.3:

- **Align** - Available on Properties Panel > Report Element Format > Layout Settings .

Options on both menus:

- **Cut**, **Copy** - Paste displays in the BO 4.3 menu if there is something on the clipboard that can be pasted.
- **Comment**
- **Delete**
- **Turn Into**
- **Assign Data**
- **Linking** - This is Element Link in BO 4.3.
- **Filter**, **Sort** & **Break** - These functions are under **Data** in BO 4.3.
- **Hide**
- **Order**
- **Format Table**

## Cell Contextual Menu




Options changed from BO 4.2 to BO 4.3:

- **Turn Into** - Available on Properties Panel > Report Element Data > Feeding Panel
- **Edit Formula** - To see the current formula for a cell, click the Formula Bar in the Analyze section of the toolbar. The bar displays above the report. To access the Formula Editor, click Display Formula Editor on the Formula bar.
- **Drill** - Available in the **More** menu in the **Analyze** section of the BO 4.3 toolbar.
- **Group** - Available from the Main Panel > **Document Objects**; click the **More** menu next to an object and select Manage Groups.

Options on both menus:

- **Cut**, **Copy** - Paste displays in the BO 4.3 menu if there is something on the clipboard that can be pasted.
- **Comment**
- **Insert** - The Count, Min, and Max options are under Footer Calculation on the BO 4.3 menu.
- **Delete**
- **Merge**
- **Clear Contents** - This is under **Content** in BO 4.3.
- **Set as Section**
- **Linking** - This is Hyperlink and Element Link in BO 4.3.
- **Assign Reference**
- **Filter**, **Ranking**, **Sort** & **Break** - These functions are under **Data** in BO 4.3.
- **Hide**
- **Formatting Rules**
- **Format Number** - This is Format Display in BO 4.3.
- **Format Cell** - This is Format Table Cell in BO 4.3. The Text formatting options are in Format Table Cell.

New BO 4.3 option:

- **Footer Calculation** - The Count, Min, and Max options are in the Insert menu in BO 4.2. This has been expanded to include Sum, Average, Percent, and Default Aggregation.

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