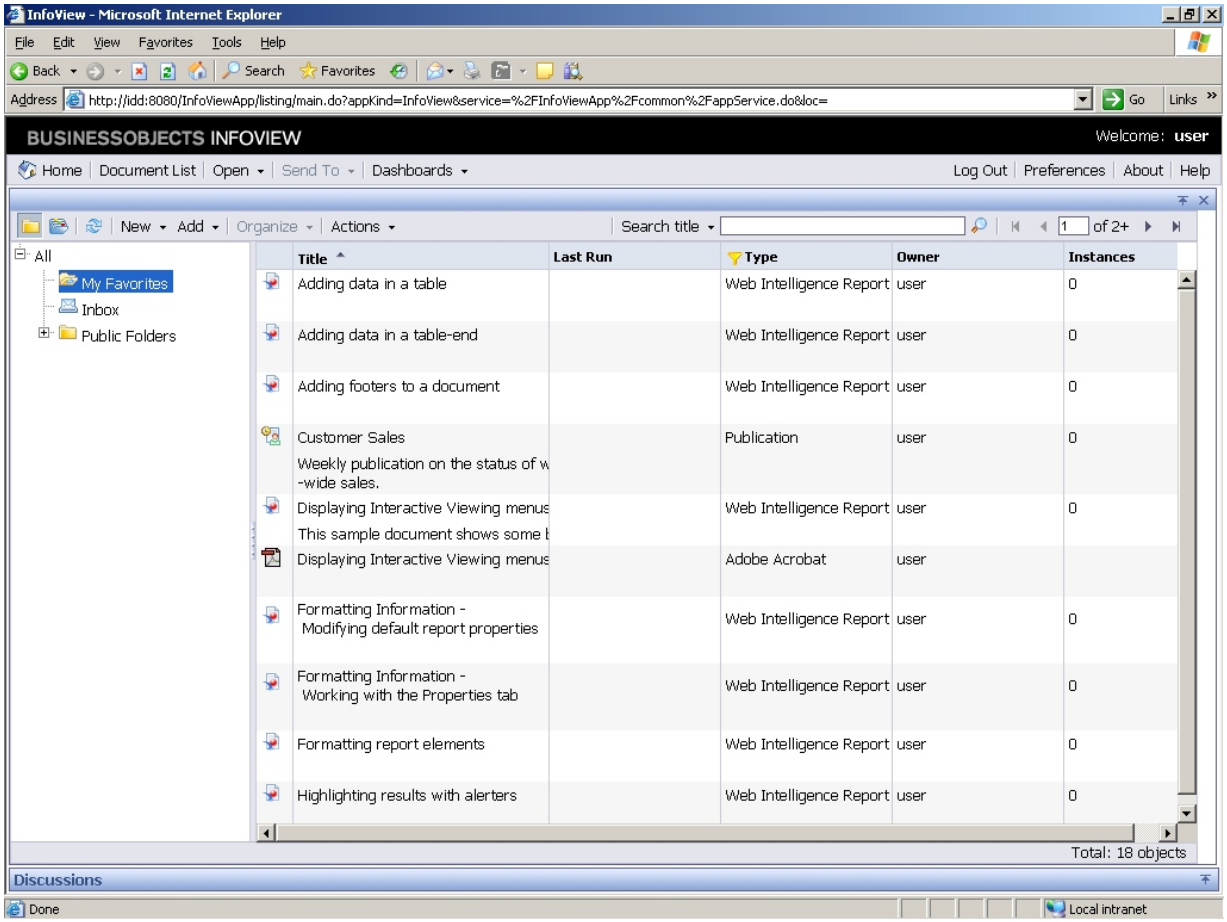
Procedure

1. Start the transaction using the menu path or transaction code.

Exporting and saving documents



2. Double-click the **Displaying Interactive Viewing menus** object.

In this example, you will save a Web Intelligence document from a Public folder to your Favorites folder.

This is useful if you are working on a document for your own use and want to keep the modified version in a Personal folder.

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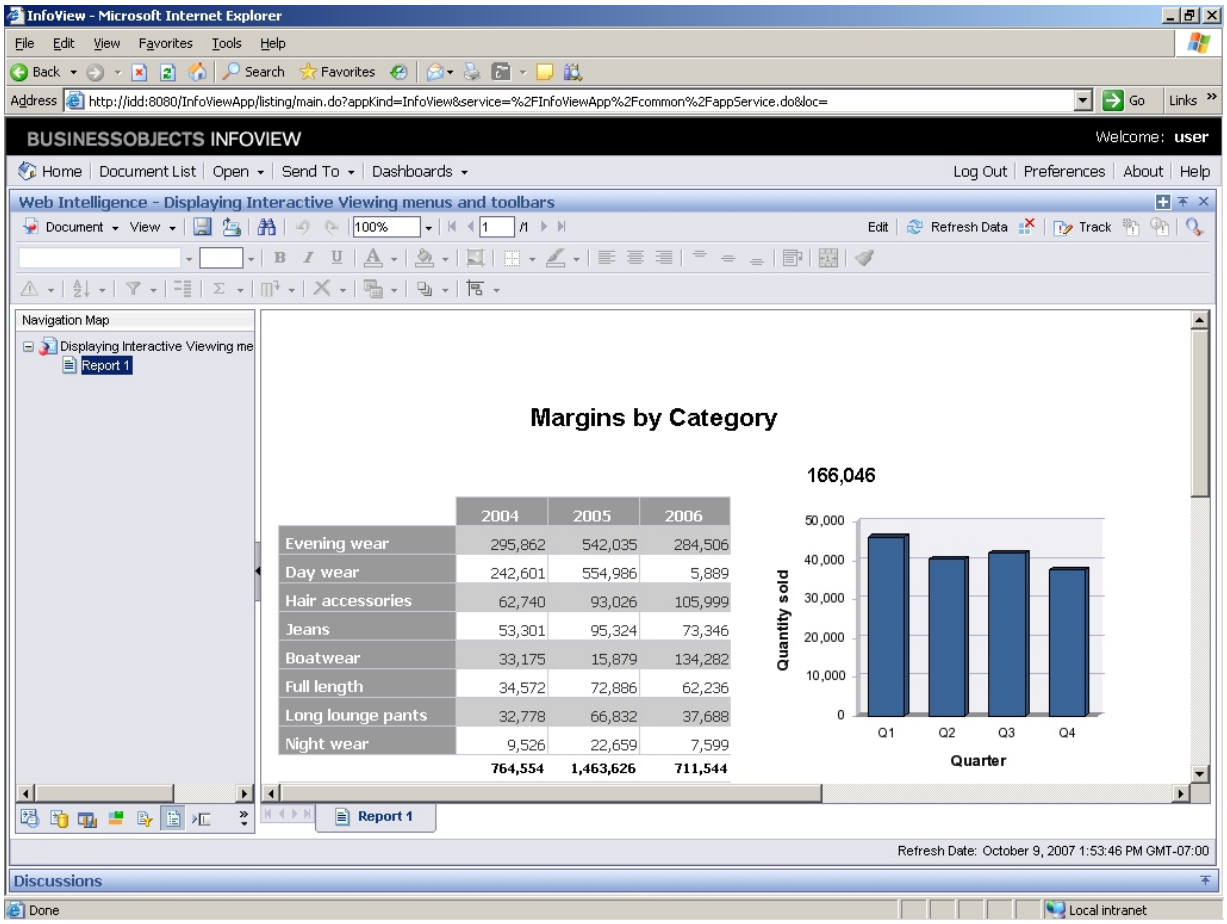
You could also save a document from your Personal folder to a Public folder if, instead of restricting access, you wanted to make it available to other InfoView users.

Exporting and saving documents



3. Click the **Document** drop-down menu.

4. Click the **Save as** list item.

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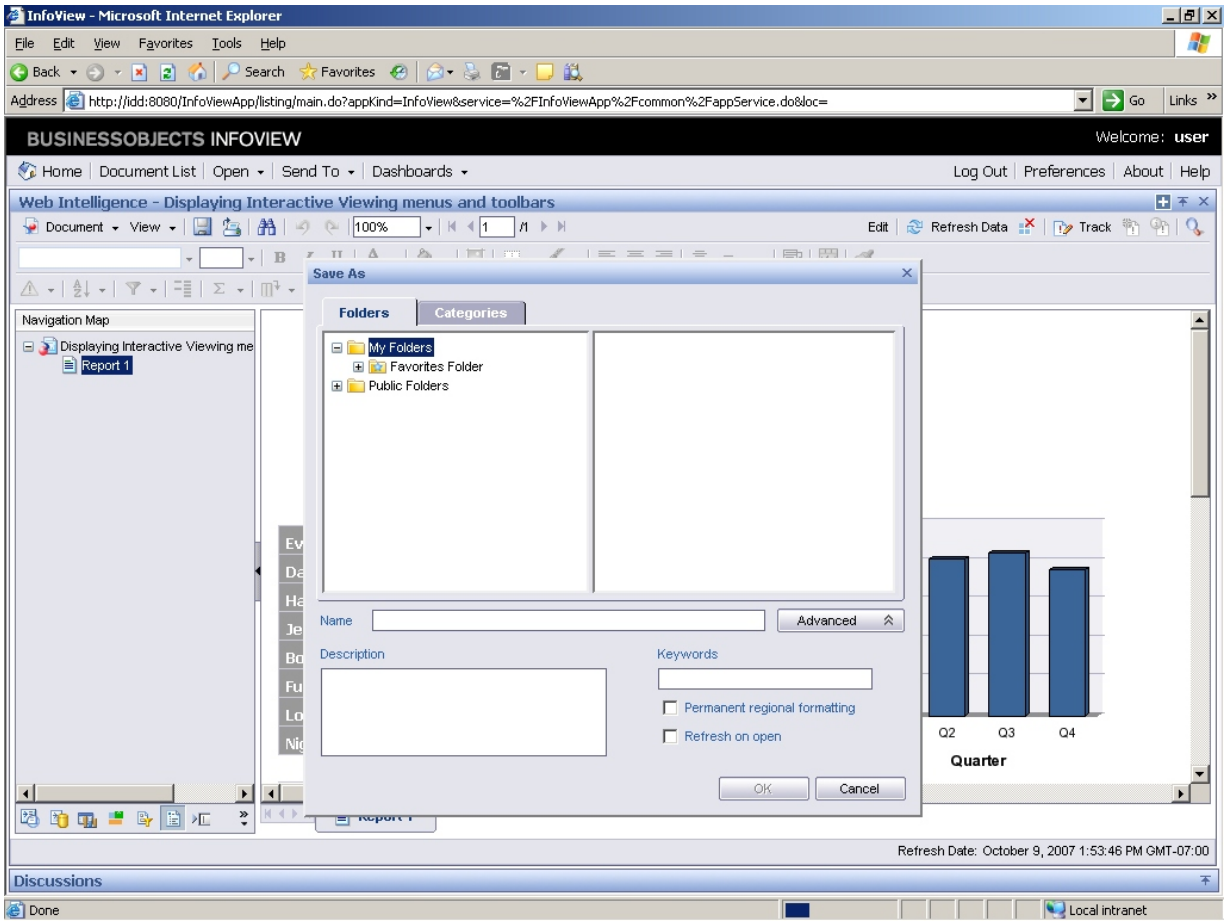
Exporting and saving documents



5. Click the **Favorites Folder** tree item.

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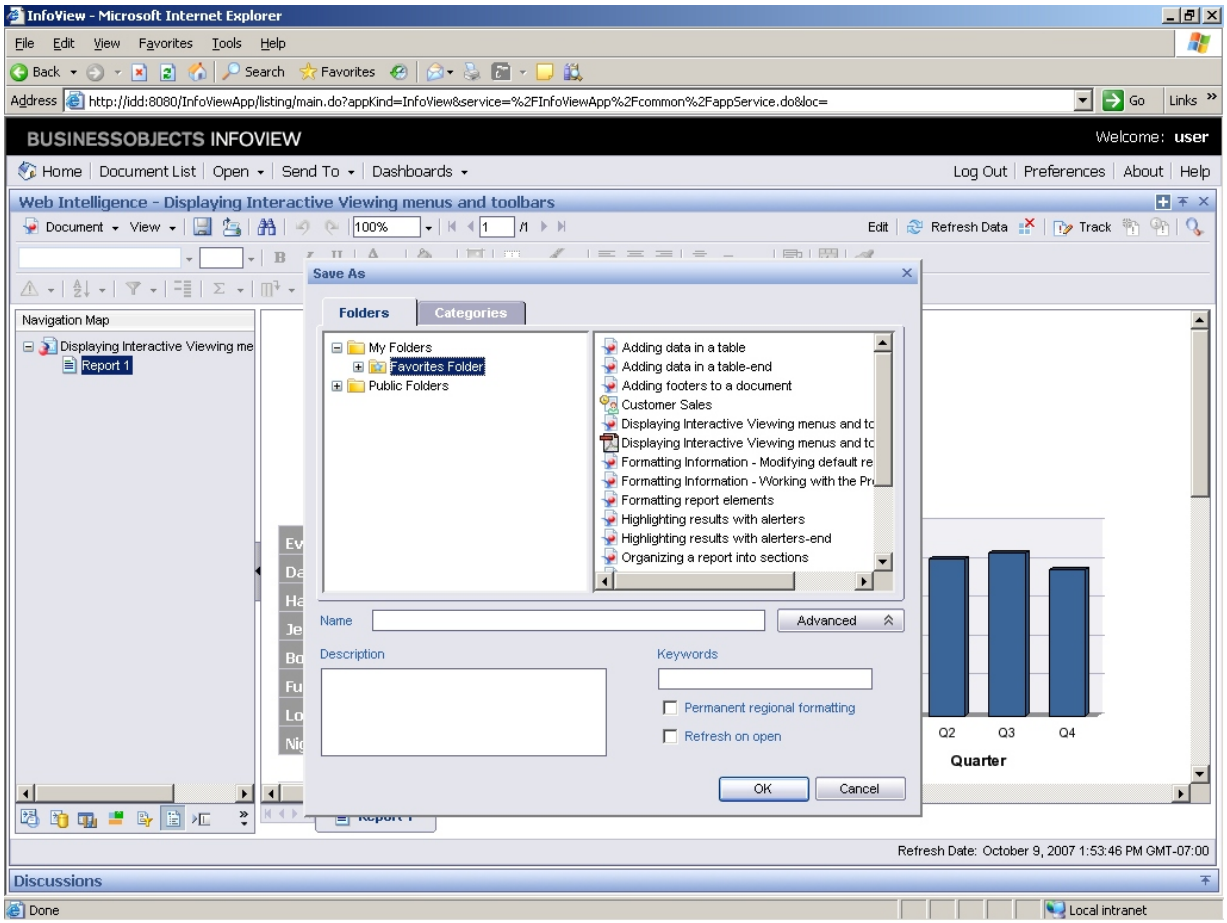
Exporting and saving documents



6. Click in the **Name**field.

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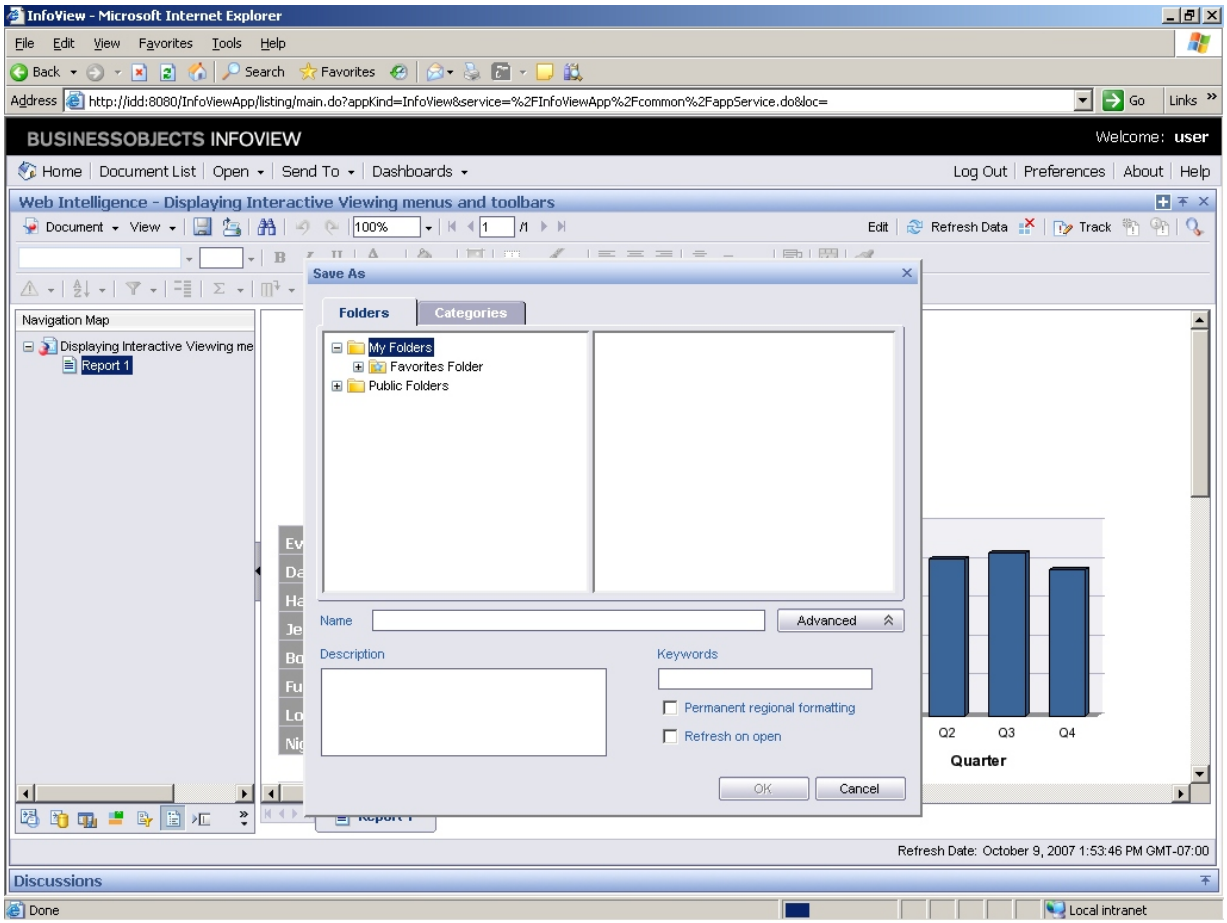
Exporting and saving documents



7. As required, complete/review the following fields:

Field	R/O/C	Description
	R	**Example:** Exporting and saving documents

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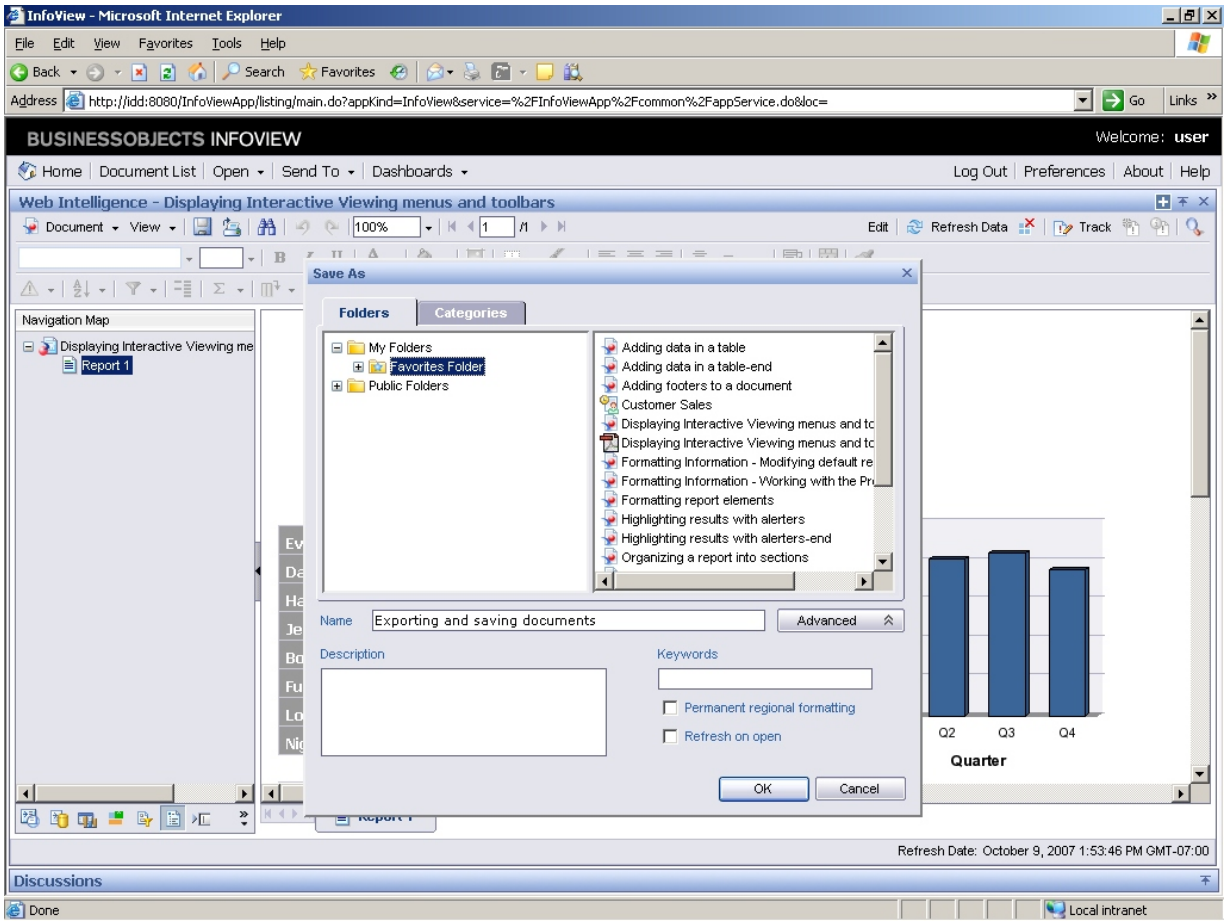
Exporting and saving documents



8. Click **OK**.

Save your changes.

9. Start the transaction using the menu path or transaction code.

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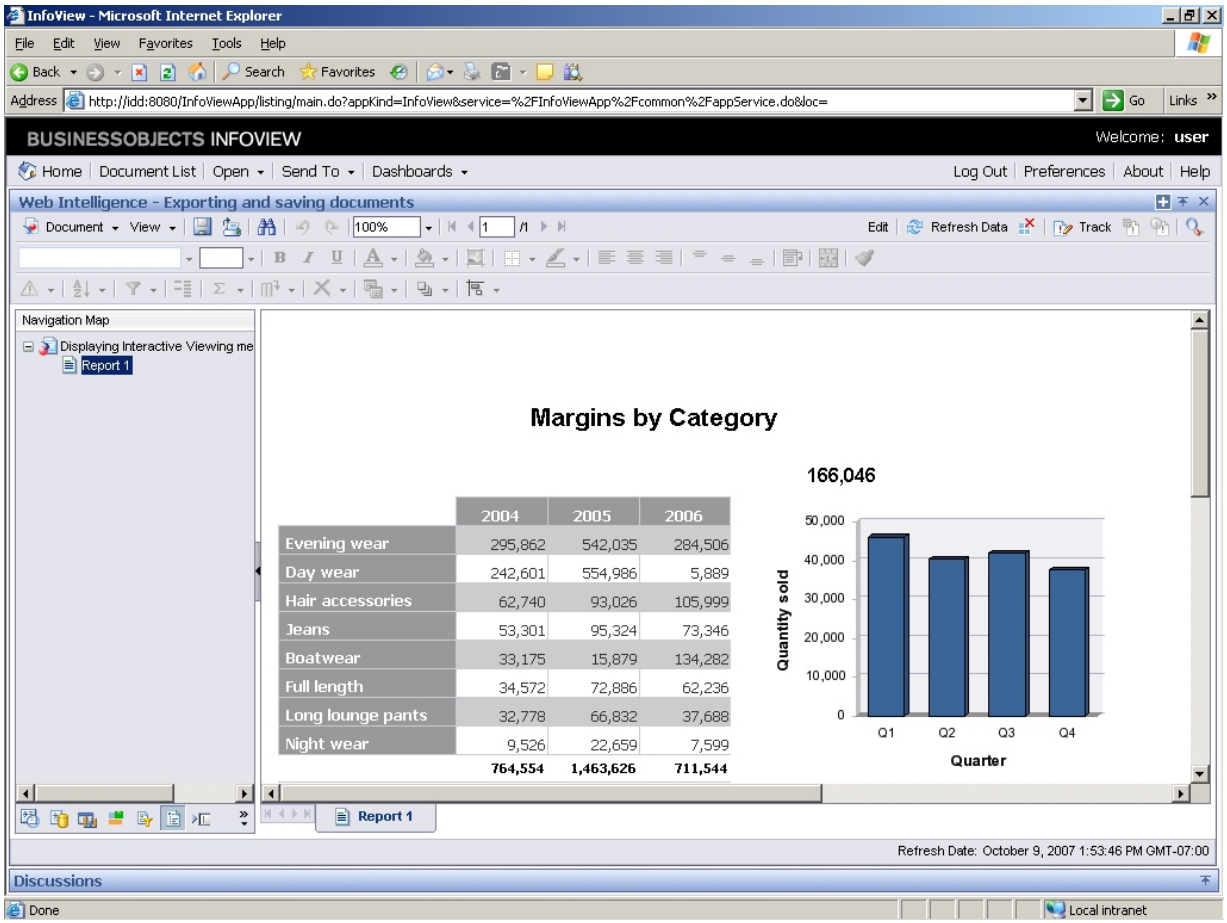
Exporting and saving documents



10. Click **Exit** ✕.

Now check to see that the new document saved as, *Exporting and saving documents* appears in your Favorites folder.

11. Double-click the **Formatting report elements** object.

The report appears in the document list.

In the next example you will save a Web Intelligence document in PDF format and export it to your desktop.This is useful if you want to distribute the report to users outside of BusinessObjects Enterprise.

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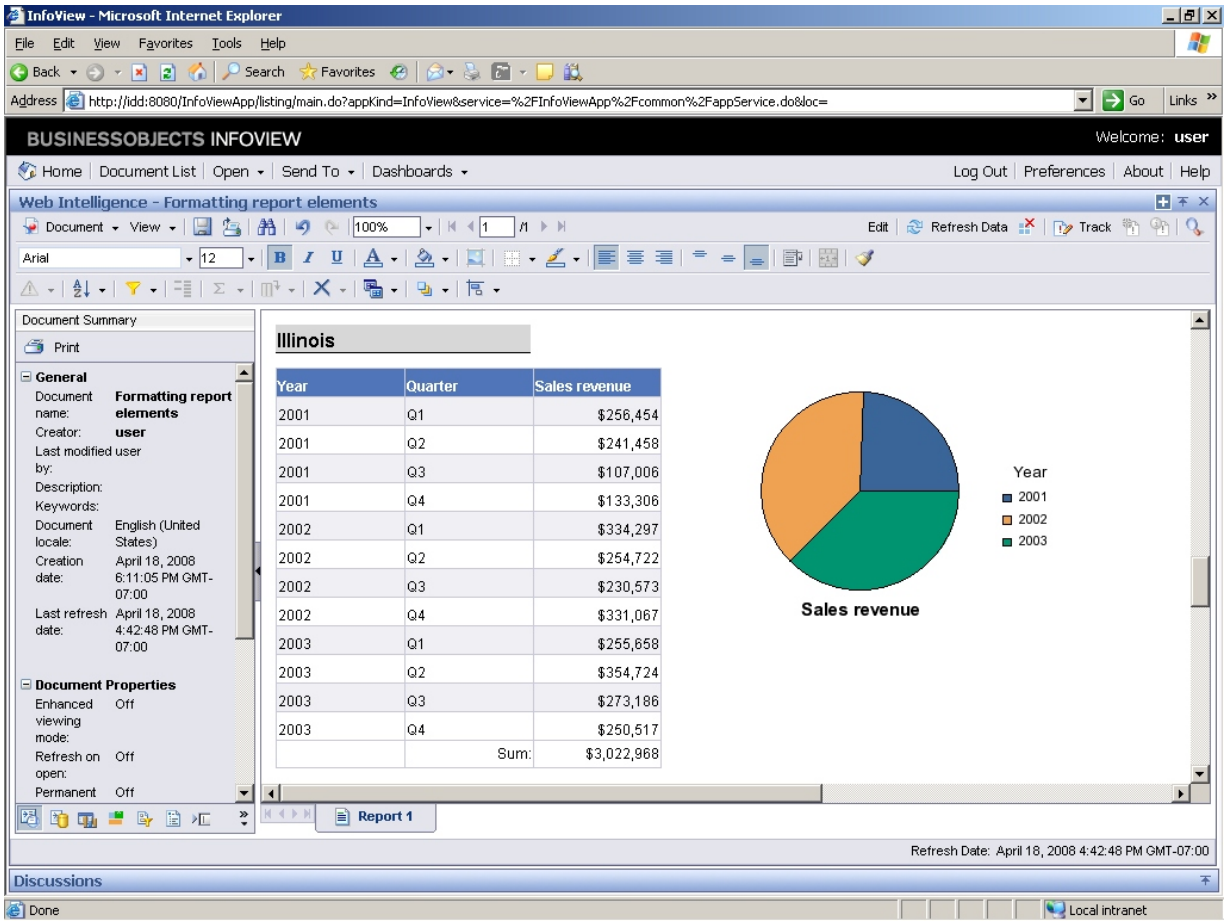
Saving as PDF



12. Click the **Document** drop-down button.
13. Click the **Save to my computer as** list item.
14. Click the **PDF** list item.

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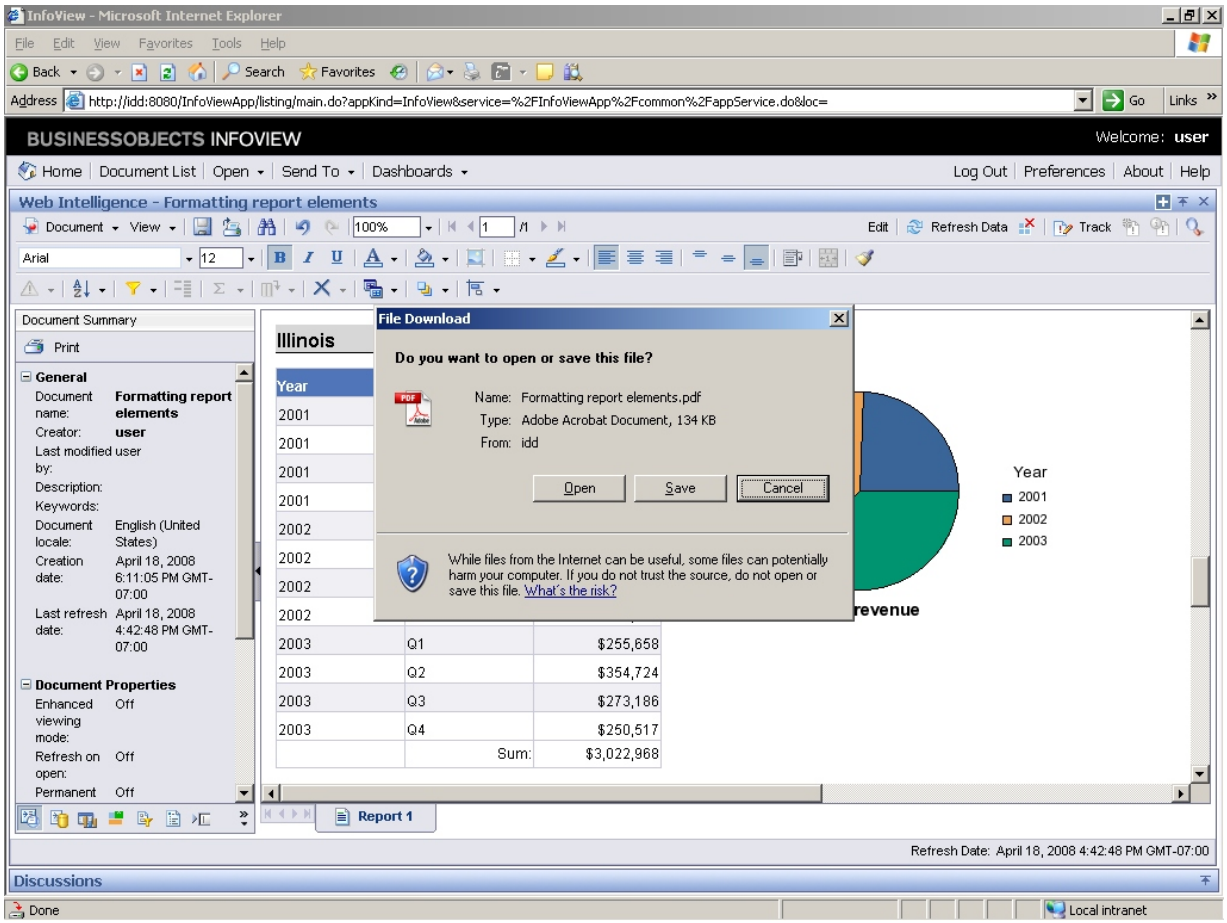
Saving as PDF



15. Click **Save.**

You can open the document directly from this dialog box or select a location to save it.

16. Click **Save.**

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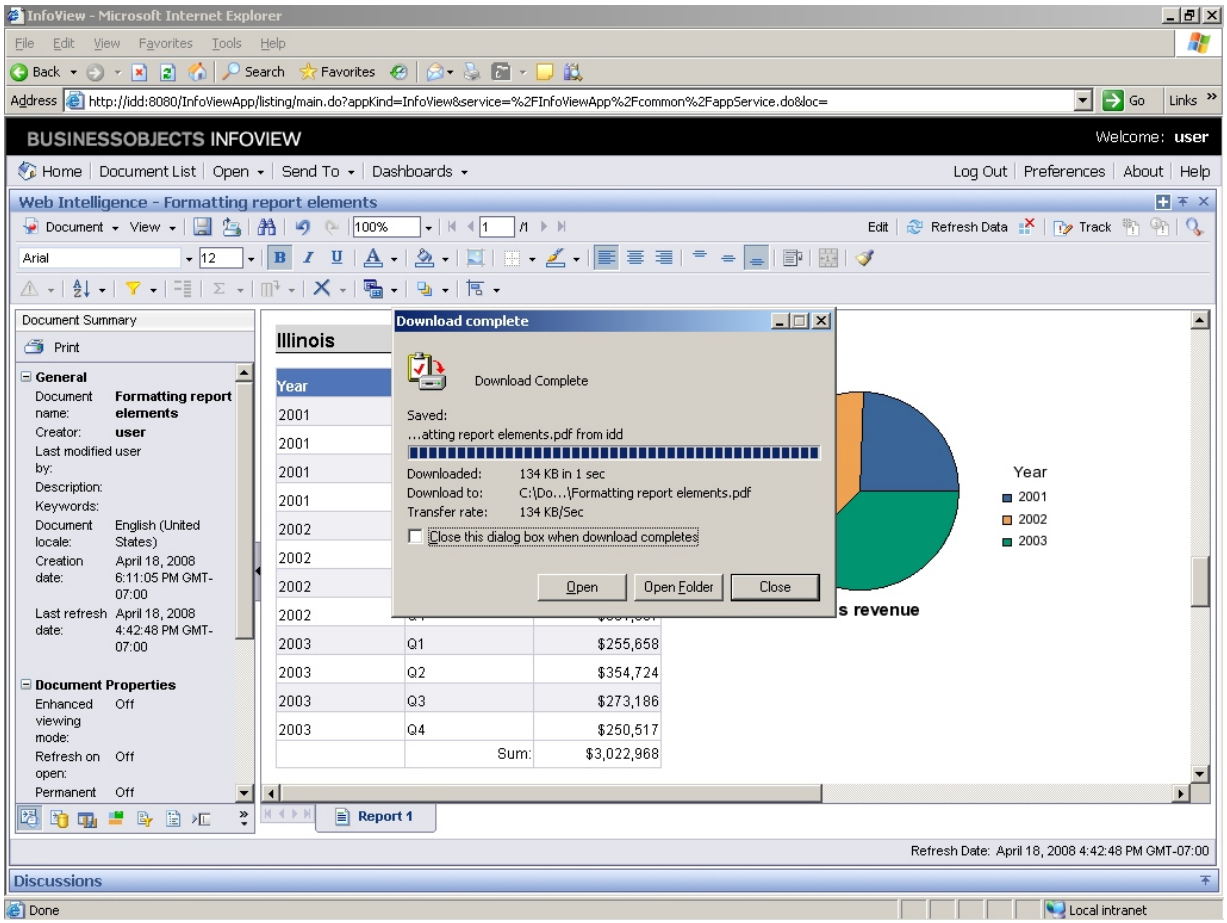
Saving as PDF



17. Click **Close.**

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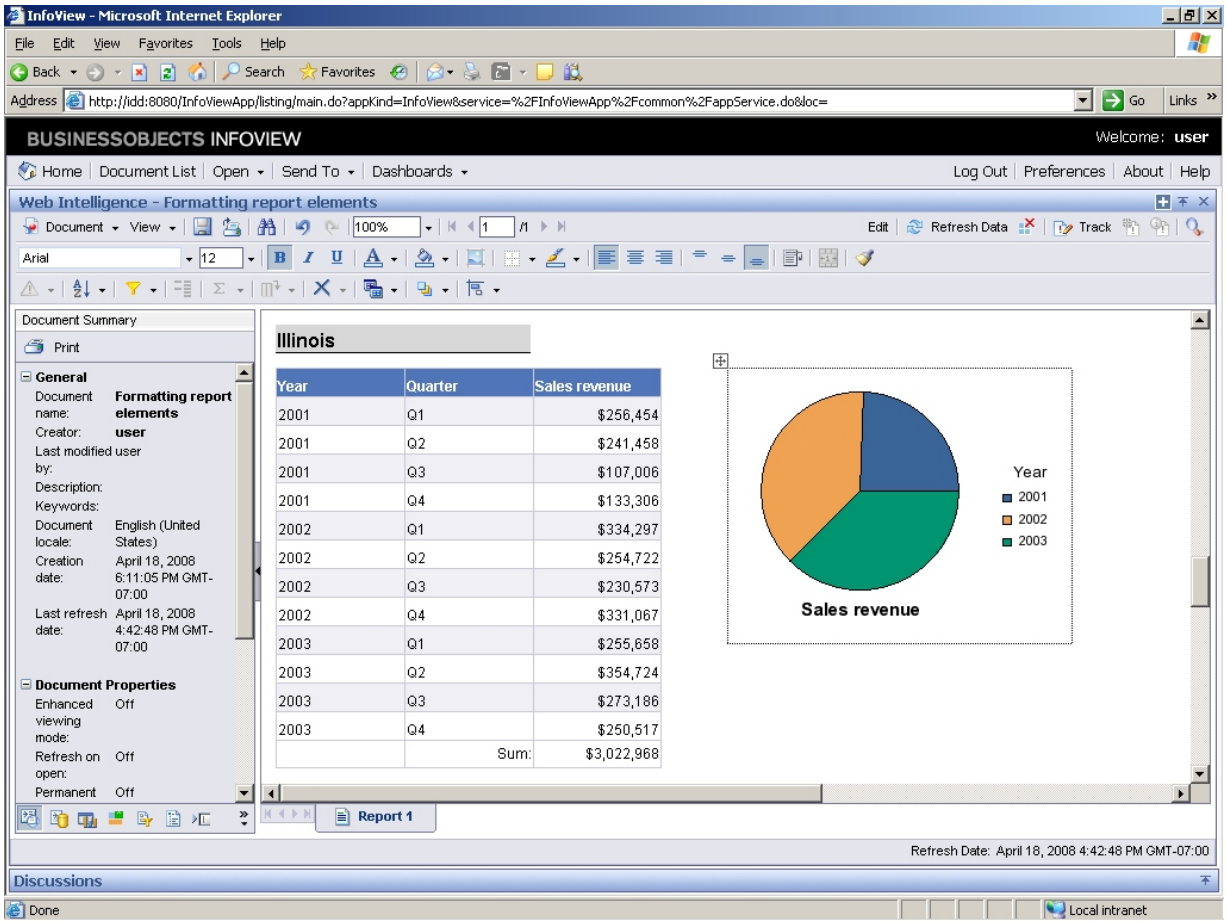
Saving as PDF



18. Click **Minimize**.

Minimize the window to check that the document has been saved to your desktop.

19. Double-click **Formatting report element.pdf**.

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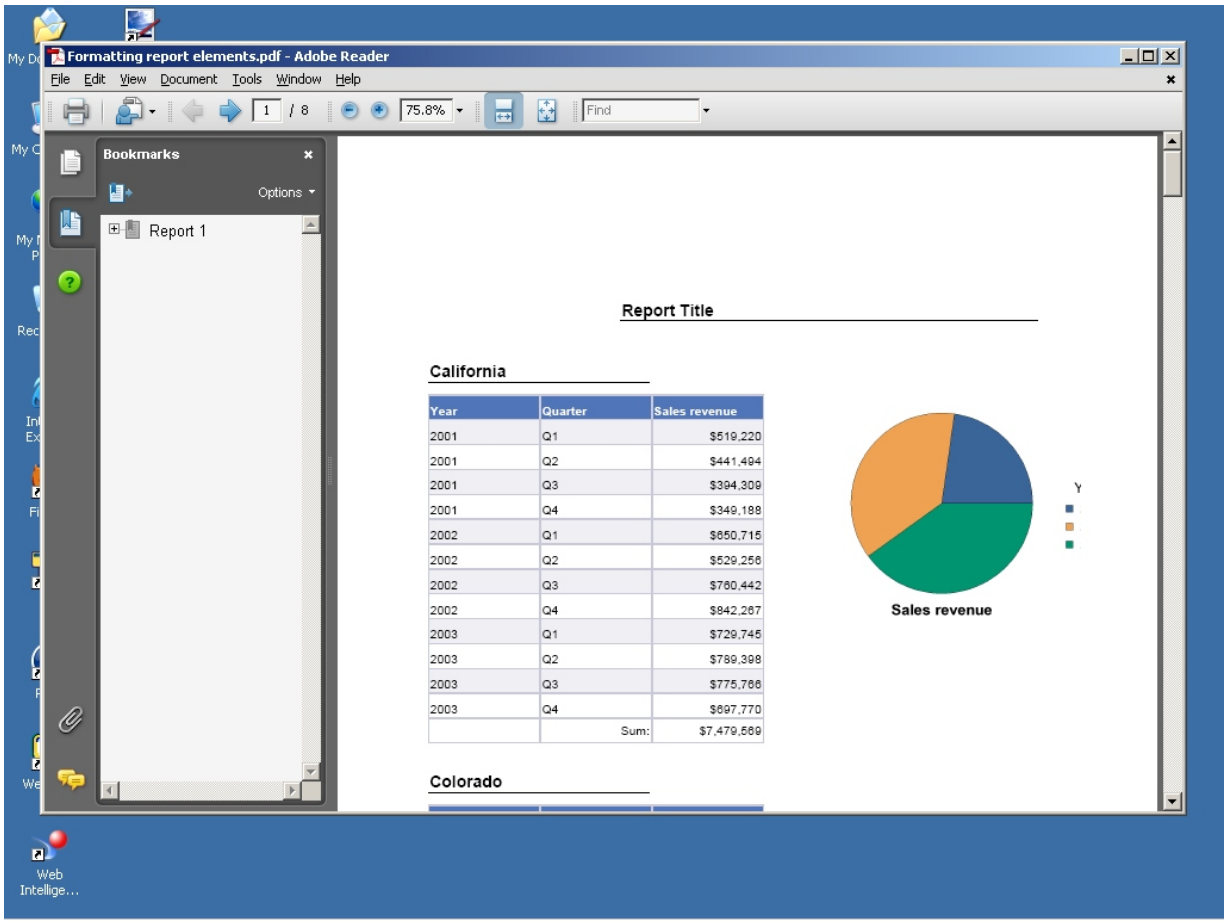
Saving as PDF



20. Click **Close** ☒.

The PDF document is successfully saved to the desktop.

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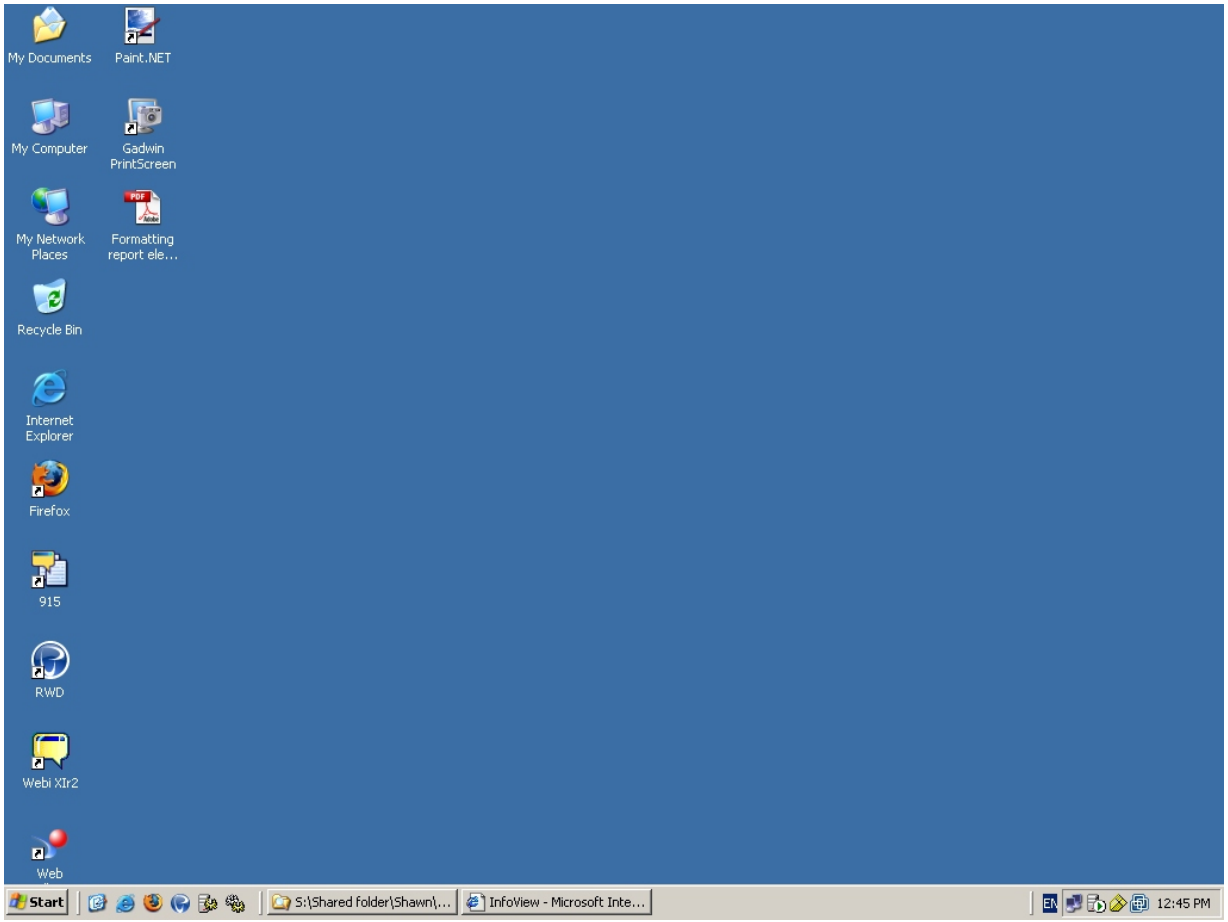
Saving as PDF



21. Click to open **InfoView**.

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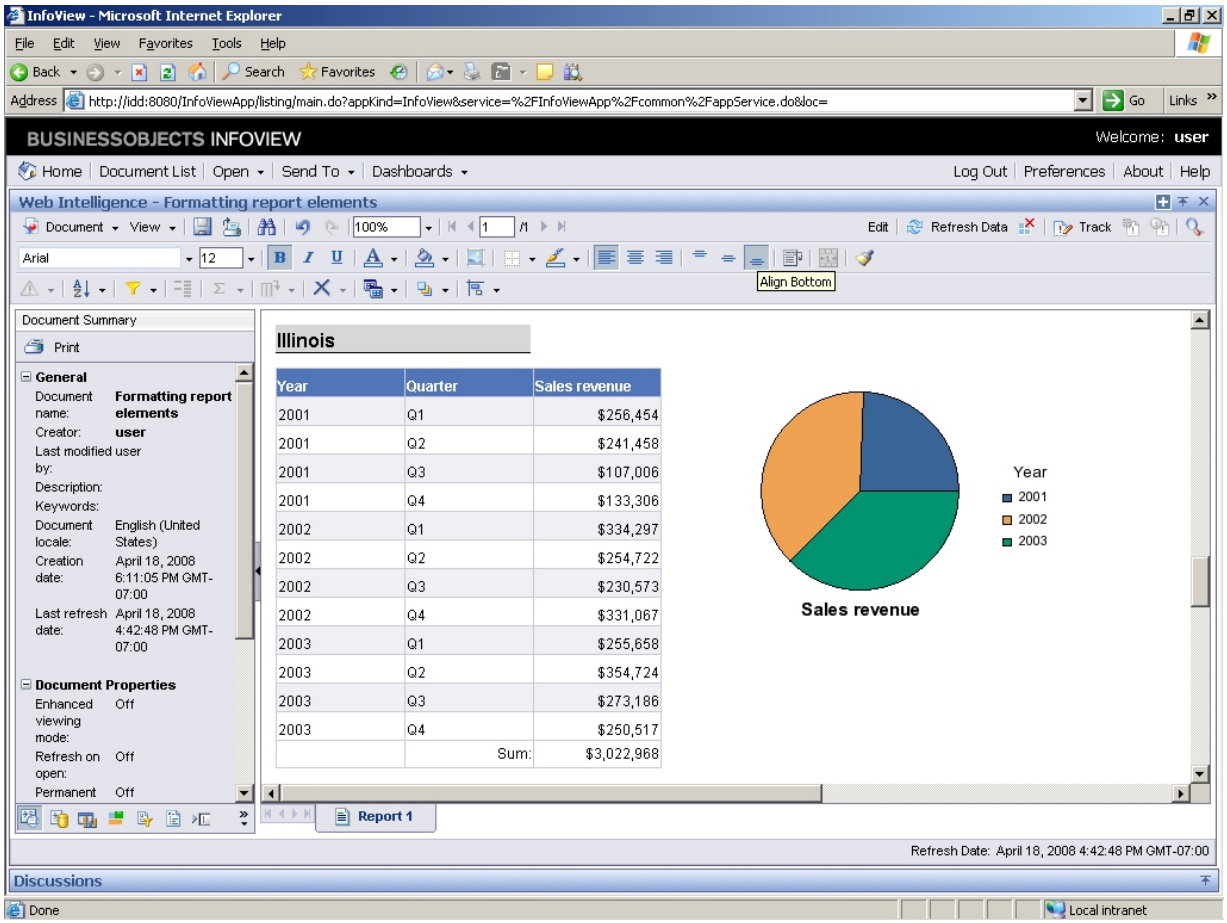
Exporting and saving documents



22. Click **Close** ✕.

Now close the report.

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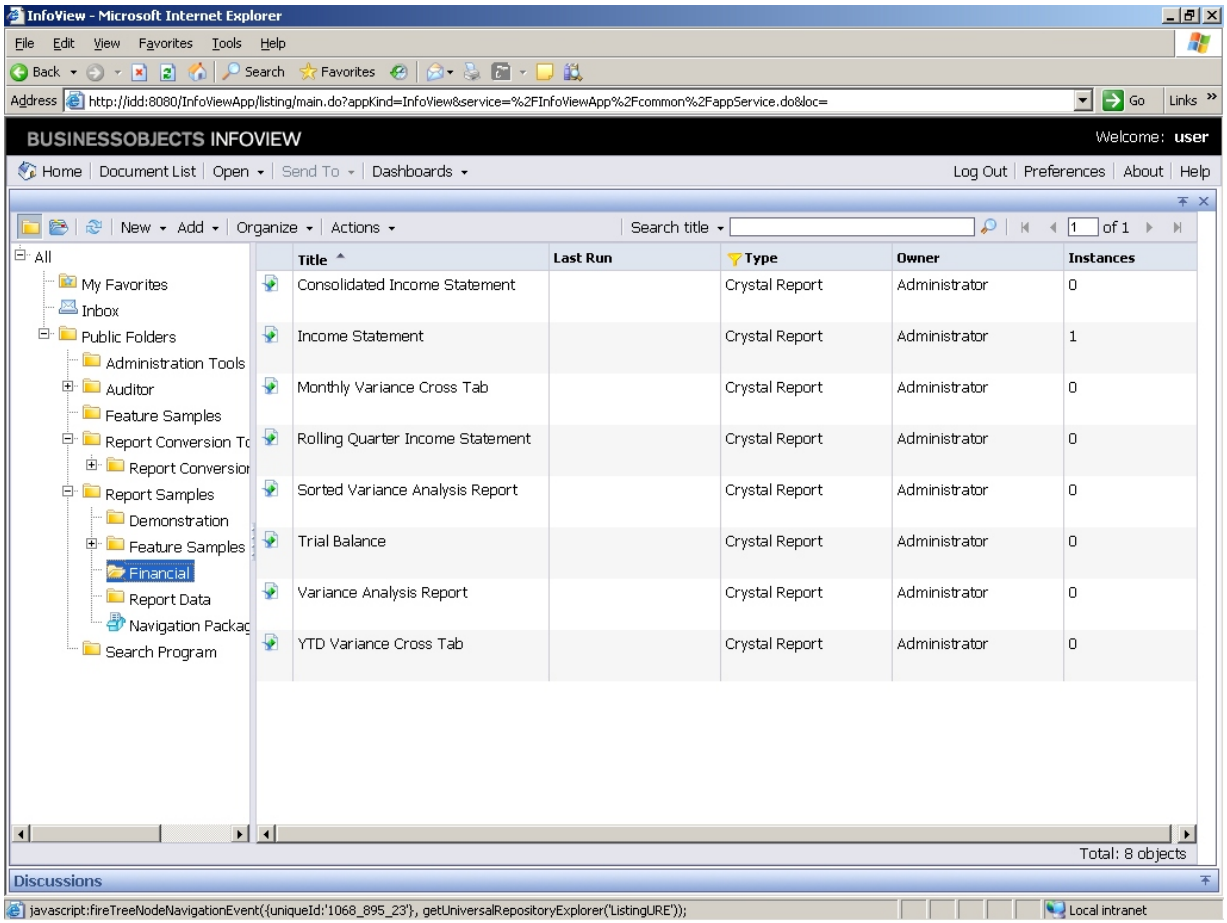
Export to Excel



23. Double-click the **Income Statement** object.

In the last example, you will export a Crystal report to Excel format.

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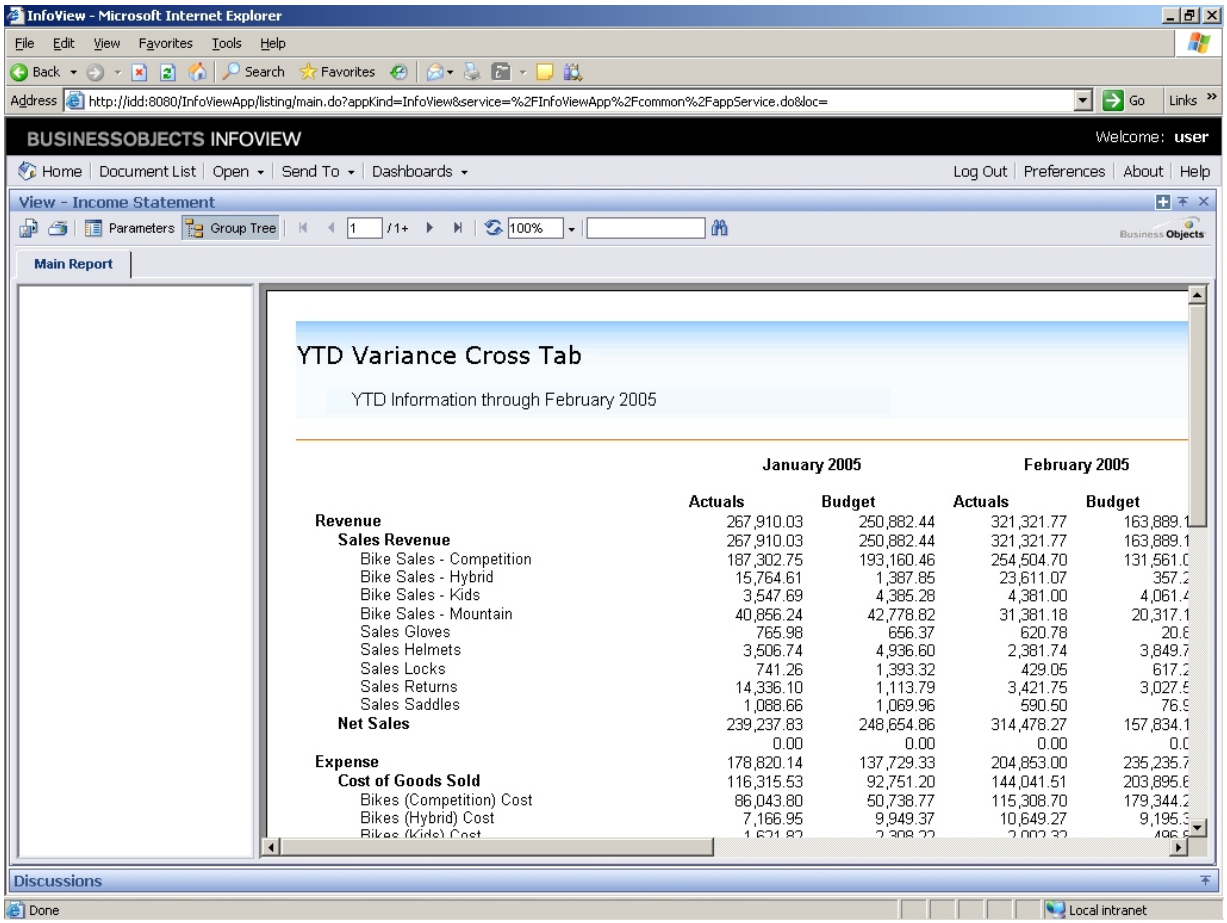
Export to Excel



24. Click **Export this report**.

25. Click the drop-down button for the **File Format:** field .

26. Click the **Microsoft Excel 97-2000 (XLS)** list item.

You can select from several formats.

Note: The Excel Data-only option does not preserve the look and feel of your original report.

27. Click **Export**.

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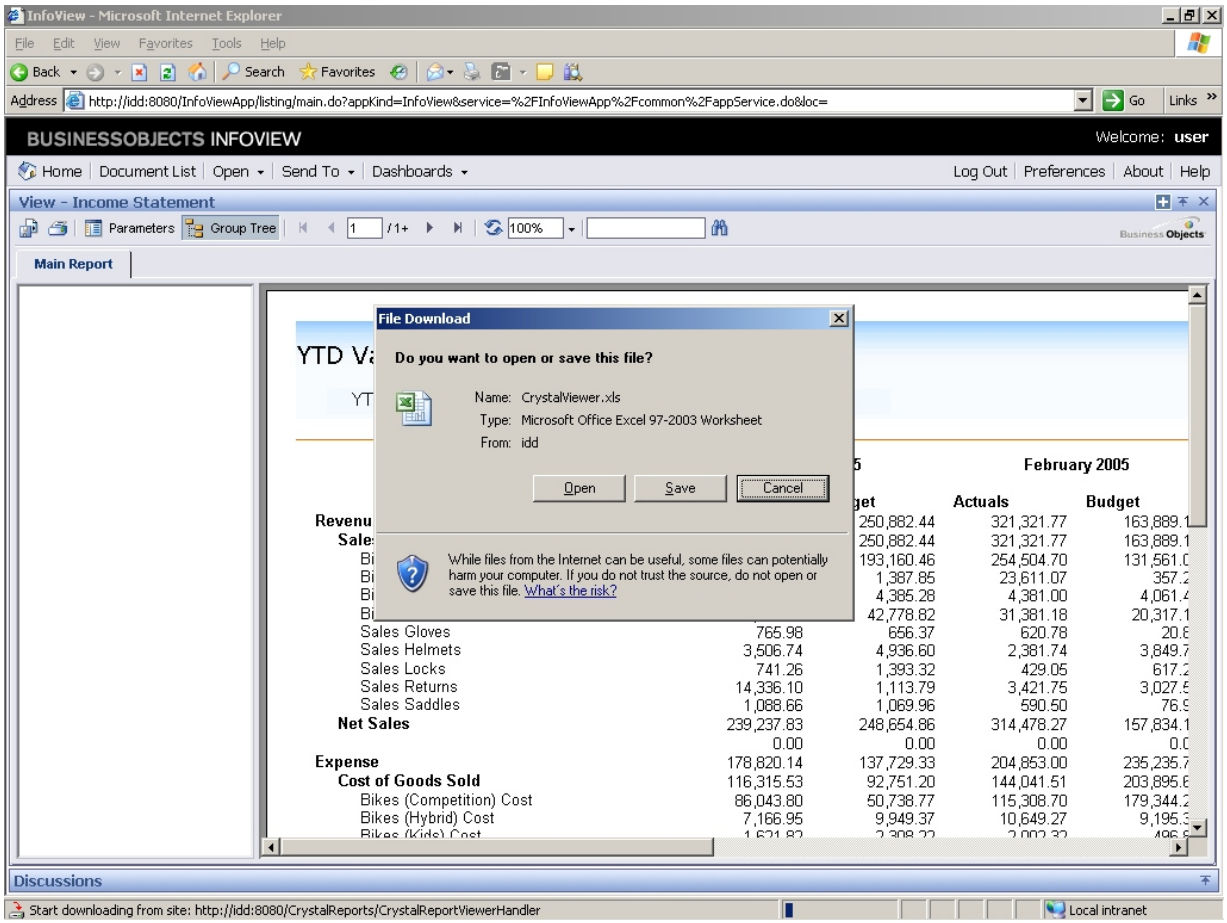
In some cases you may choose to export only certain pages of the report.

Export to Excel



28. Click **Open**.

At this point you could choose to save the document to a location on your local computer.

Open the report to see how it exports to Excel format.

29. Press **[Enter]** to continue.

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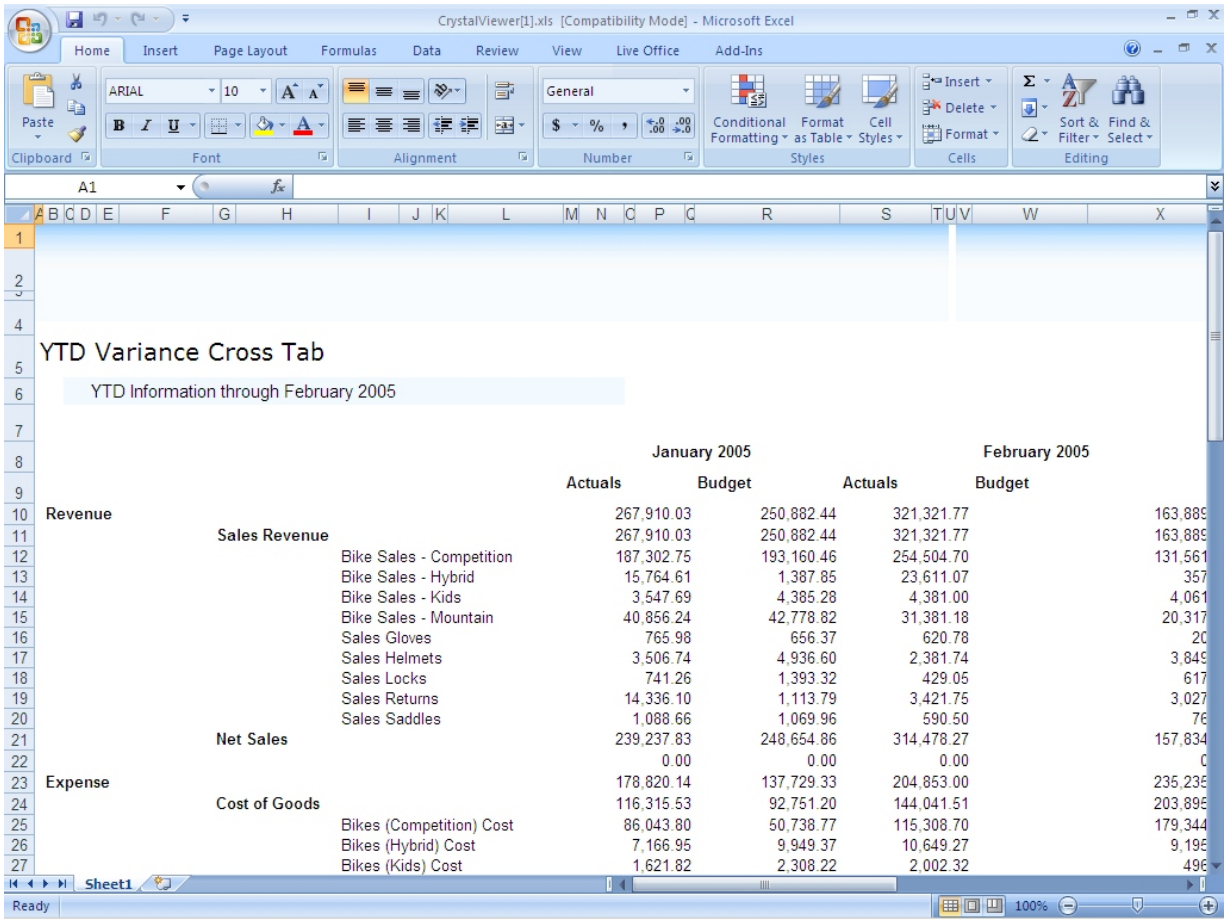
The document opens in Excel format.

Note: When you export a report to a different file format, you may lose some or all of the formatting that appears in your report. However, the program attempts to preserve as much formatting as the export format allows.

Press **[Enter]** to continue.

End of Simulation.



YTD Variance Cross Tab

YTD Information through February 2005

			January 2005		February 2005	
			Actuals	Budget	Actuals	Budget
Revenue			267,910.03	250,882.44	321,321.77	163,889
	Sales Revenue		267,910.03	250,882.44	321,321.77	163,889
		Bike Sales - Competition	187,302.75	193,160.46	254,504.70	131,561
		Bike Sales - Hybrid	15,764.61	1,387.85	23,611.07	357
		Bike Sales - Kids	3,547.69	4,385.28	4,381.00	4,061
		Bike Sales - Mountain	40,856.24	42,778.82	31,381.18	20,317
		Sales Gloves	765.98	656.37	620.78	20
		Sales Helmets	3,506.74	4,936.60	2,381.74	3,849
		Sales Locks	741.26	1,393.32	429.05	617
		Sales Returns	14,336.10	1,113.79	3,421.75	3,027
		Sales Saddles	1,088.66	1,069.96	590.50	76
	Net Sales		239,237.83	248,654.86	314,478.27	157,834
			0.00	0.00	0.00	0
Expense			178,820.14	137,729.33	204,853.00	235,235
	Cost of Goods		116,315.53	92,751.20	144,041.51	203,895
		Bikes (Competition) Cost	86,043.80	50,738.77	115,308.70	179,344
		Bikes (Hybrid) Cost	7,166.95	9,949.37	10,649.27	9,195
		Bikes (Kids) Cost	1,621.82	2,308.22	2,002.32	496

30. End of Simulation.

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