

What are *Portal Favorites* and *Save As*?

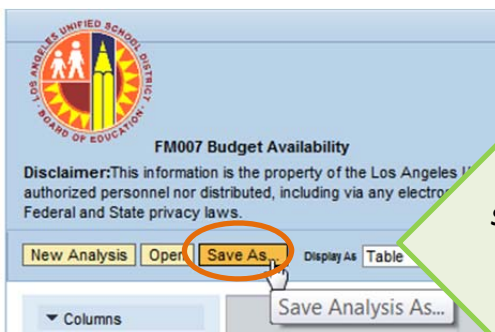
- **Portal Favorites** is a dedicated place on the BASE SAP portal page
- **Portal Favorites** provides users with a tool to create custom folders for organizing saved reports
- **Save As** is a button on the report that allows users to save a report layout for future use
- **Save As** provides users with a tool to customize and save reports

How does Portal Favorites and Save As work together?

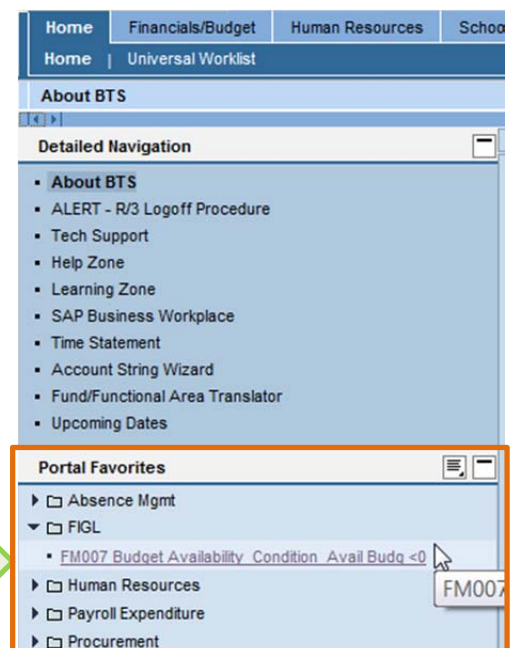
- Saving a report using the **Save As** button saves the customized report in **Portal Favorites**
- Reports saved to **Portal Favorites** can be stored and organized in custom folders for easy access

Why should I use *Portal Favorites* and *Save As*?

- It is easy to use and user friendly
- It is an improvement over **Bookmark** links
- Because you can customize reports and save them to a dedicated place on the BASE SAP portal
- Reports saved in **Portal Favorites** do not "break" like **Bookmark** links when the underlying report is changed



Save As allows you to save report layouts to **Portal Favorites**



To save a report to **Portal Favorites** using **Save As** button:

Run BW Report and customize layout

Click on **Save As** button

Save as pop-up opens

Enter **Description**, click on **OK** button

*HINT: If you have created folders in **Portal Favorites**, they will display. You can save in folders by clicking on folder to open

To edit **Portal Favorites**

To Edit Portal Favorites

Click on **Context Menu** button to open menu selection

To organize Portal Favorites Folders and Reports

Select **Organize BI Favorite Reports**

Using Organize Entries

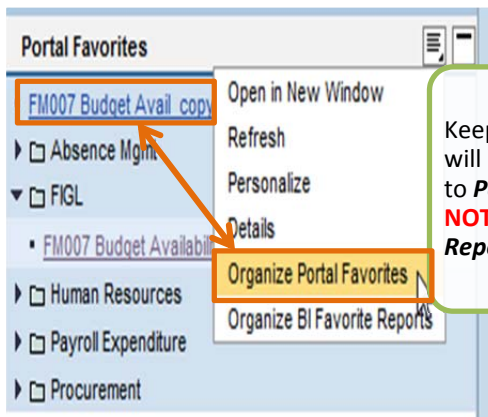
Organize Entries pop-up opens. Click on **Context menu** button to edit specific folder(s)

What is the difference between Organize Portal Favorites and Organize BI Favorite Reports?

Organize Portal Favorites contains reports created from an existing **Portal Favorite**

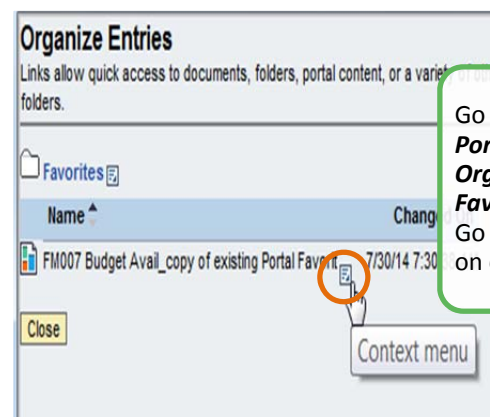
Managing Portal Favorites: Moving reports between *Portal Favorites* and *BI Favorite Reports*

You can create a **Portal Favorite** from an existing **Portal Favorite**



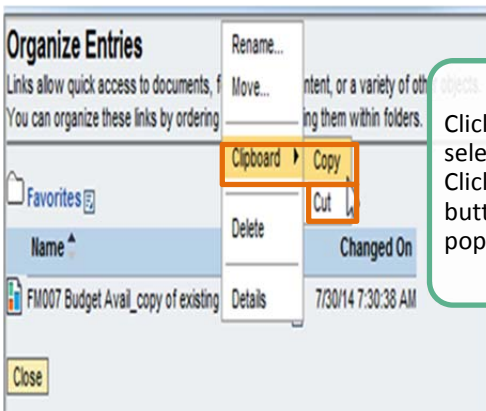
Keep in mind, it will save the link to **Portal Favorites** **NOT** **BI Favorite Reports**

To move reports or folders between **Portal Favorites** and **BI Favorite Reports**



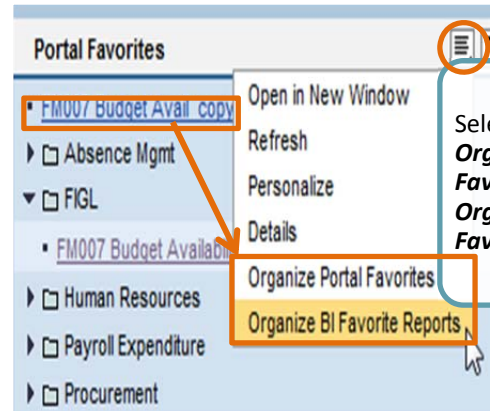
Go to **Organize Portal Favorites** or **Organize BI Favorite Reports**. Go to report, click on **Context Menu**

Use **Clipboard** to **Copy** or **Cut**



Click on **Clipboard**, select **Copy** or **Cut**. Click on **Close** button to close pop-up.

Click on **Context Menu** button and select destination where you want to paste link



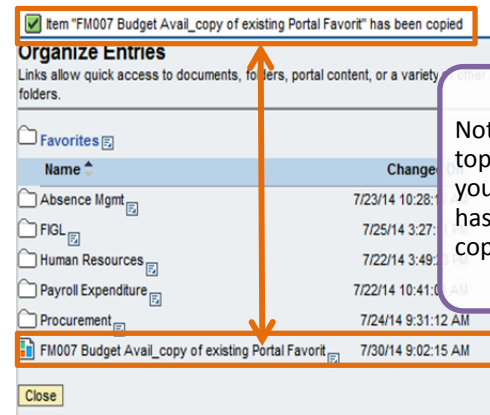
Select either **Organize Portal Favorites** or **Organize BI Favorite Reports**

Select **Context menu** for where you want to Paste



From **Context Menu**, click on **Clipboard**, select **Paste**

Organize Entries pop-up refreshes and copied/cut report (or folder) displays



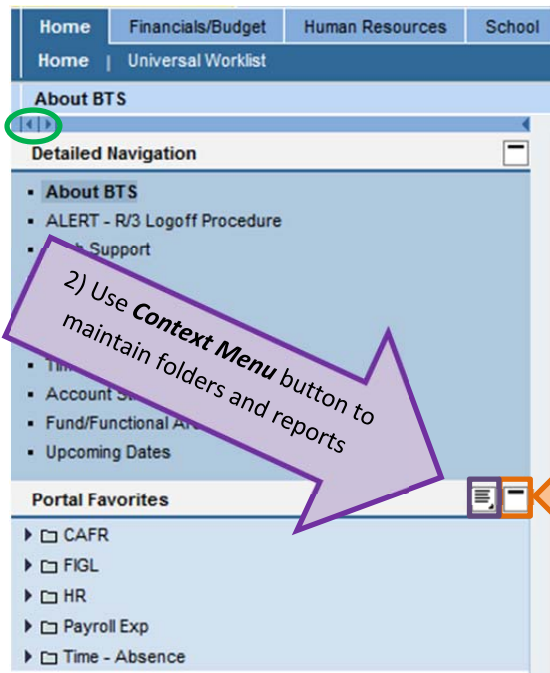
Note: message at top that informs you that report has been copied/cut

Portal Favorites: Tips and Tricks

1) Use arrows to expand or reduce width of **Portal Favorites**

2) Use **Context Menu** button to maintain folders and reports

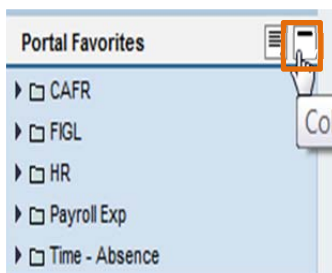
3) Use **Expand/Collapse Tray** buttons to display (Expand) or hide (Collapse) **Portal Favorites**



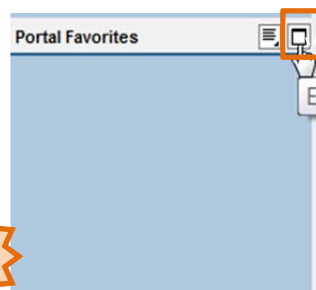
Use arrows to expand display width of **Portal Favorites** (right-facing arrow to expand, left-facing arrow to minimize)



Click on **Context Menu** to maintain **Portal Favorites**



Click on **Collapse Tray** button to hide **Portal Favorite** folders/reports



Click on **Expand Tray** button to display **Portal Favorite** folders/reports