

SAP Lumira, server for teams
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SAP Lumira, server for teams User Guide



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1 About this Guide

1.1 Who should read this guide

This guide is intended for business users who want to analyze documents created using SAP Lumira Desktop on web, and share these with other colleagues.

1.2 What this Guide contains

This guide contains:

- An overview of SAP Lumira, server for teams
- Information on how to use SAP Lumira, server for teams

2 Overview of SAP Lumira, server for teams

SAP Lumira is an application that helps you to visualize and create stories about data. Using SAP Lumira, you can manipulate, edit, format, and refine data to create and share visualizations that represents data graphically.

SAP Lumira, server for teams is a complete departmental data discovery solution. It is easy, quick and simple to set up and administer, and can be used to analyze and visualize business data, and to share insights with team members.

3 Getting Started

When you launch SAP Lumira, server for teams, you can start working immediately from the home page. The *ADMINISTRATOR User* can view two sections of the home page: *My Items* and *Administration*. End users can only view the *My items* section after logging on to SAP Lumira, server for teams. You can use the left-side menu for quick access to these application components and resources.

Table 1:

Left side Menu option		Description
<i>My Items</i>	<i>Shared with me</i>	This is a list of all Lumira documents that have been shared with you by other members. This is the default landing page for members who have been sent any documents by other team members.
	<i>Shared by me</i>	This is a list of all Lumira documents that you have shared with other members.
	<i>All</i>	This is a repository of all Lumira documents that you have sent, received, created. This is the default landing page if the <i>Shared with me</i> inbox is empty.
<i>Administration</i>	<i>Members</i>	This section contains the options to create members, add members to groups, assign roles, reset passwords, and delete members.
	<i>Groups</i>	This section contains the option to create, edit, and delete groups.
	<i>Sessions and Licenses</i>	This section contains the option to manage members sessions and licenses.
	<i>Maintenance</i>	This section provides information about the status of the Lumira server for teams, server RAM usage, the number of CPUs, and server information such as operating system, version, document count, and the logging directory location. You can also restart the SAP Lumira, server for teams server here.
	<i>Configuration</i>	This section contains the option to configure HTTPS/SSL, drivers, proxy settings, and member authentication.

3.1 Saving a Document from SAP Lumira Desktop to SAP Lumira, server for teams

To view Lumira documents in SAP Lumira, server for teams, you first need to save the Lumira documents from SAP Lumira Desktop to SAP Lumira, server for teams.

If you have created Lumira documents using the following desktop versions and saved them in SAP Lumira, server for teams 1.28, then some features are not compatible. Therefore, we recommend that you upgrade to SAP Lumira Desktop 1.28.

- SAP Lumira Desktop 1.22
- SAP Lumira Desktop 1.23
- SAP Lumira Desktop 1.24

Note

Before exporting a Lumira document from SAP Lumira Desktop, the SAP Lumira, server for teams member must have previously logged on to SAP Lumira, server for teams and changed his/her password.

1. Launch SAP Lumira Desktop.
2. Choose **File** > **Preferences** > **Network**.
3. Enter the SAP Lumira Team Server URL.

You can get the URL after launching SAP Lumira, server for teams from the start menu and copying the system name or IP address and the port number that appears.

Example

`http://<hostname or IP Address:port/biprws> or http://11.111.1.111:111/biprws.`

4. Choose **Done**.
5. Open the Lumira document that you want to save.

You cannot export sample documents from SAP Lumira Desktop to SAP Lumira, server for teams.

Note

- If you save a document with **Predictive content**, then this document is not supported in SAP Lumira, server for teams.

6. Choose **File** > **Save As**.

The **Save Options** dialog box appears.

7. On the left pane, select **SAP Lumira Team Server**.

You have to log on to SAP Lumira, server for teams connection before you can save to this location.

8. Enter your user name, password, and authentication type to log on to SAP Lumira, server for teams.
9. Choose **Connect**.
10. Enter a name and description for the document, e-mail addresses or group name of members with whom you want to share this document, and provide view or edit right for the document.

11. Choose [Save](#).

The Lumira document is exported to SAP Lumira, server for teams.

3.2 Opening a Document from SAP Lumira, server for teams in SAP Lumira Desktop

In SAP Lumira Desktop, you can import, view and edit Lumira documents from SAP Lumira, server for teams.

1. Launch SAP Lumira Desktop.
2. On the left hand pane in the home page, choose [SAP Lumira Team Server](#).
3. Enter your credentials for SAP Lumira, server for teams..
4. Choose [Connect](#).

Documents that are either shared by or shared with you are displayed. You can view documents by double-clicking them. You can also modify documents and save them.

Note

The sample documents are not displayed.

3.3 Launching SAP Lumira, server for teams

The administrator creates members in SAP Lumira, server for teams and shares URL with the members so that they can log on. Newly created members need to log on to SAP Lumira, server for teams and change their password before exporting the Lumira document from SAP Lumira desktop.

Note

New members can get locked if they do not change the password before exporting the Lumira document from SAP Lumira Desktop to SAP Lumira, server for teams. Administrators can help with resetting the password.

Perform the following steps after a newly created member has logged on for the first time:

1. Launch SAP Lumira, server for teams.
2. Enter your user name, password, and authentication type.
3. Choose [Logon](#).
4. Enter and confirm your new password.
5. Choose [Set Password](#).

You receive a success message stating password reset successful. Please confirm.


6. Enter your new password.
7. Choose [Logon](#).

3.4 Viewing/Editing a Document

You can view/edit Lumira documents that have been exported/saved from the SAP Lumira Desktop to SAP Lumira, server for teams. Depending on the rights assigned to you for the document while sharing, you can view/edit the document.

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to view/edit.

The documents are displayed under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Choose *View*

You can also view the document by double clicking on the document.

The Lumira document opens in the Lumira story viewer.

Note

- If you have view rights, and there are no stories available, the *No story available* dialog box appears.
- If you have edit rights, and there are no stories available, you are directed to the *Visualize* room.

When you choose the edit icon in Lumira story viewer, you are directed to the compose room to create a new story. You can perform the following activities only if you have edit rights:

- Make changes in the document.
- Add visualization(s) and story templates in the document.
- Save your changes by choosing Save/Save As.
- Share the document.

3.4.1 Viewing a Document Containing ESRI Maps

To view Lumira documents containing ESRI maps, you need to have an ESRI account.


Ensure that you have met the following prerequisites:

You have ensured that the proxy setting for that browser allows you to access the following URL before opening a document containing ESRI maps:

- <https://www.arcgis.com/sharing> ➡
- <http://js.arcgis.com/3.8/> ➡
- <http://ajax.googleapis.com/ajax/libs> ➡
- <http://services.arcgisonline.com/ArcGIS/rest/services> ➡
- <http://static.arcgis.com/attribution/> ➡
- <http://server.arcgisonline.com/ArcGIS/rest/services> ➡

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to view/edit.

The documents are under *Shared with me* or *Shared by me* or in the *All* inbox section.

3. Choose .
4. Choose [View](#) or double-click on the document.

You can also view the document by double clicking it.

5. If the Lumira documents contains ESRI maps, you are prompted to enter the ESRI ArcGIS account user name and password.

Note

If you try to view a Lumira Document containing ESRI Maps but do not have a ArcGIS account, a dialog box appears containing a link for creating a ArcGIS account.

3.4.2 Viewing SAP HANA Online Documents

SAP Lumira, server for teams supports viewing of documents based on SAP HANA online data sources.

Make sure that you meet the following prerequisites:

- You have refresh rights.


The values that you provide while creating the Lumira document are used to view the data. You are therefore not prompted to enter the variable/input parameter values.

Note

When you open the Lumira documents based on SAP HANA online data sources, you can see the latest data. The Refresh icon is therefore disabled.

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to view/edit.

The documents are visible under [Shared with me](#) or [Shared by me](#) or [All](#) inbox.

3. Choose .
4. Right-click on the document and choose [View](#).

Choose [View](#) or double-click the document

5. To view the SAP HANA online document, perform the following:
 - a. Log on to the SAP HANA system
 - b. Enter your username and password

Note

- Depending on the rights provided, you can perform the following operations on Lumira documents based on SAP HANA online data sources:
 - Edit
 - Save/Save As
 - Schedule


- Export to PDF

3.5 Refreshing a Document

You can refresh a document in order to see the latest information in it. Members with *End User* or *Admin* role can refresh a document regardless of whether or not they have *View* and *Edit* rights for it. When you refresh the document, you are prompted to enter datasource credentials.

1. Log on to SAP Lumira, server for teams.
2. Open the document that you want to refresh by double-clicking it.

The documents that you want to refresh can be under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Enter your user name and password.

If the corresponding drivers are not installed, the following error message is displayed: Unable to connect. Check your data access driver. You then need to install the drivers before you can refresh the document.

5. Choose *Connect*.

You can now view the refreshed document.

Note


Viewing and editing of Lumira documents based on following offline data sources are supported in SAP Lumira, server for BI Platform:

- SAP BW
- Query with SQL
- SAP HANA (offline)

3.5.1 Refreshing a Document Based on Enhanced FHSQL

1. Log on to SAP Lumira, server for teams.
2. Choose a document that you want to refresh.

The documents that you want to refresh can be under *Shared with me*, or *Shared by me*, or *All* inbox.

3. Choose .
4. Enter your data source user name and password.
5. Choose *Connect*.

You can now view the refreshed document.

Note

FHSQL supports the following data sources:

- MS SQL Server 2008 and MS SQL Server 2012
- Oracle 11
- Generic JDBC datasource

3.5.2 Refreshing a Document Based on Salesforce.com data source

1. Log on to SAP Lumira, server for teams.
2. Choose a document that you want to refresh.

The documents that you want to refresh can be under *Shared with me*, or *Shared by me*, or *All* inbox.

3. Choose .

A *New Dataset* dialog box appears.

4. Enter your user name and password.

Note

System automatically updates the proxy details from the server.

5. Choose *Connect*.

You can now view the refreshed document.

3.5.3 Refreshing a Document Based on Universe

Lumira server for teams 1.28 supports refreshing of document with prompts.

1. Log on to SAP Lumira, server for teams.
2. Choose a document that you want to refresh.

The documents that you want to refresh can be under *Shared with me*, or *Shared by me*, or *All* inbox.

3. Choose .

The *Connect to Universe* dialog box appears.

4. Enter the CMS system IP/Host.
5. Enter *User Name* and *Password*.
6. Select *Authentication Type*.
7. Choose *Connect*.

You can now view the refreshed document.

3.5.4 Refreshing a Document Based on XLS/CSV/TXT file

You have placed the Lumira desktop's .xls/.csv/.txt file in the shared location and used UNC path while creating a connection to source file.

Note

You can also place the XLS/CSV/TXT file on a shared network location.

1. Log on to SAP Lumira, server for teams.
2. Choose a document that you want to refresh.

The documents that you want to refresh can be under *Shared with me*, or *Shared by me*, or *All inbox*.

3. Choose .

You can now view the refreshed document.

3.5.5 Refreshing a Document Based on SAP Business Warehouse

1. Log on to SAP Lumira, server for teams.
2. Choose the document that you want to refresh.

The documents that you want to refresh are visible under *Shared with me*, or *Shared by me*, or *All inbox*.

3. Choose .

When you choose refresh, you are prompted to enter your SAP BW credentials. After entering the credentials, the *Variable* dialog appears. This displays the list of prompts or variables that you have entered during acquisition of data.

4. Select the required prompts or variables.
5. Choose *Connect*.


You can now view the refreshed data.

3.5.6 Modifying Variables and Input Parameters for Lumira documents based on SAP HANA Online


SAP Lumira, server for teams supports refreshing of Lumira documents based on SAP HANA Online. Refreshing a Lumira document based on SAP HANA fetches the latest data from the SAP HANA database.

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document that you want to refresh.

The documents are displayed under *Shared with me* or *Shared by me* or *All inbox*.

3. Choose .
4. If you have already configured single sign-on via SAML for the SAP HANA system, then SAP Lumira, server for teams logs you on to SAP HANA and displays the [Variable](#) dialog.
5. If you have not configured SAML SSO to the SAP HANA system, you need to enter the following credentials:
 - a. [Server](#)
 - b. [Instance/Port](#)
 - c. [User](#)
 - d. [Password](#)
6. Choose [Connect](#).

The [Variable](#) dialog appears. The dialog box displays a list of variables and input parameters prefilled with values saved in Lumira document. You need to answer prompts by specifying the mandatory variables and input parameters. You can specify values by typing them, selecting them from the list of values, or searching the list for the values that you are interested in. The Lumira document then displays your chosen variables and input parameters.

7. Choose [OK](#).
8. If you want to change variables and input parameters while viewing Lumira document based on SAP HANA online, choose  in the story viewer page.
9. Select the required variables and input parameters.
10. Choose [OK](#).


You can now view the data for your chosen variables and input parameters.

3.5.7 Modifying Variables and Input Parameters for Lumira documents based on SAP HANA Offline

SAP Lumira, server for teams supports refreshing of Lumira documents based on SAP HANA data sources. Refreshing a Lumira document fetches the latest data from the SAP HANA database.

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document that you want to refresh.

The documents are displayed under [Shared with me](#) or [Shared by me](#) or [All inbox](#).

3. Choose .
4. If you have already configured single sign-on via SAML for the SAP HANA system, SAP Lumira, server for teams logs you on to SAP HANA and displays the [Variable](#) dialog.
5. If you have not configured SAML SSO to the SAP HANA system, you need to enter the following credentials:
 - a. [Server](#)
 - b. [Instance/Port](#)
 - c. [User](#)
 - d. [Password](#)
6. Choose [Connect](#).

The Variable dialog appears. The dialog box displays a list of variables and input parameters prefilled with values saved in the Lumira document. You need to answer prompts by specifying the mandatory variables

and input parameters. You can specify values by typing them, selecting them from the list of values, or searching the list for the values that you are interested in. The Lumira document then displays the specified variables and input parameters.

7. Choose [OK](#).

You can now view the data for your chosen variables and input parameters.

3.6 Searching a Document

Searching options provide you with a simple and immediate way of searching for items; documents, owners and so on.

1. Log on to SAP Lumira, server for teams.
2. In the left pane, choose the [All](#) or [Shared by me](#) or [Shared with me](#) section.

This displays a list of the Lumira documents that you have sent or received, or the documents that you have created and not yet shared with other users.

3. In the right pane, enter the keyword to start searching.

The search result includes the specified search keywords.

4. You can perform the search in following two ways:
 - a. **General search:** The search box accepts the keywords and searches exclusively for the letters contained in the [Name](#) column.
 - b. **Search using keywords:** The search box accepts the use of keywords with specific syntaxes. The syntax **<column name>: <keyword>** searches for the keyword in a particular column.

For example: Owner(column name): David(keyword) returns the list of documents with owner containing the letters david.

3.7 Saving (Save As) a Lumira document in SAP Lumira, server for teams

An [end user](#) or [administrator](#) can only save a document if they have [Edit](#) rights for it. The most recently saved version of the document is kept as the latest copy. If several members open and modify the same document at the same time, the version of the document saved by the last member after saving their modification is saved as the latest copy.

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to view.
3. If you have edit rights, you can modify the document.
4. Choose [Save/Save As...](#)
5. To [Save As...](#) the document, perform the following:
 - a. Enter a new name for the document.

- b. (Optional) Add a description.
 - c. Choose *OK*.
6. If you have view rights, you can only *Save As...* the document.

i Note


- Once you have performed *Save As...* and saved the document with a different name, you become the owner of the document.
- Saving the document does not change the owner of the document.
- *Save As...* option is enabled for sample documents.
- After you have performed *Save/Save As...*, the documents appears on a listing page for the owner and for other users with rights to view/edit the document.

3.8 Sharing a Document

You can use the *Share* option to share a document with other members. You can only share the document if you have *Edit* rights for it. You can share a document with several members at once by entering the member names separated by commas. You can also share a document with the group.

1. Log on to SAP Lumira, server for teams.
2. Select the document you want to share.

The document that you want to share can be under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Choose *Share*.

i Note

You can only share the document if you have the edit rights.

The *Share* dialog box appears.

5. In the *Add Members/Groups* field, double-click the text box.

The members list appears. You can add multiple members by entering multiple names separated by commas or by entering the name of a group.

i Note

Unlike in Release 1.0, where the member name was an e-mail address, you can provide any member name other than your e-mail address in Release 1.25 and above.

6. Provide members/groups with View/Edit permissions.
7. Choose *Add*.
8. Choose *Done*.

i Note


- Under *Shared with me*, the system displays a column called *SHARED BY*. This column displays the member who has shared the document with the user who is logged on.
- If you share the document with other members, the document is listed under your *Shared by me* section.
- If you have published a document from SAP Lumira desktop, it is listed under *ALL*, unless you have shared the document with other user when publishing the document.
- If you have edit rights, you can perform the following activities:
 - You can remove members with whom you have previously shared the document.
 - You can also see members who have shared the document with other members.
- If you are the owner of the document, you can remove members or access rights assigned to members for your document.

3.9 Downloading a Document

You can download the Lumira document from SAP Lumira, server for teams to your local driver and share it with other colleagues through email.

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to download.

The document that you want to download, can be under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Choose *Download*.
5. Enter a file name.
6. Choose *Save*.

i Note


All Lumira documents are downloaded to the local machine download folder. The default location for download depends on your browser settings. For Chrome 36 and above, clicking on download directly downloads the .lums file without a pop up.

3.10 Deleting a Document

Only owner and *ADMINISTRATOR User* can delete a document. Other users with edit rights for the document cannot delete it.

1. Log on to SAP Lumira, server for teams.
2. Select the document that you want to delete.

The document that you want to delete can be under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Choose *Delete*.

The *Delete confirmation* dialog box appears.




5. Choose *Delete*.

Note

You cannot restore the document once it is deleted.

3.11 Changing Password

Administrators or end users with admin rights can change the existing password.

1. Log on to SAP Lumira, server for teams.
2. Click on *Welcome <Username>* at the top of the right-hand side panel.
If you are an administrator, you can see *Welcome Administrator* displayed.
3. Choose  *Settings*  *Change Password* .
4. Enter your current password.
5. Enter your new password and confirm it.
6. Choose *Done*.


3.12 Exporting a story to Portable Document format (PDF)

Converting a story to PDF helps you to send files consultants, business partners, and clients. PDF files are used by companies to make sure that no changes are made to the original document.


Make sure that you have met the following prerequisites:

- You have been granted the Export as File right.
1. Log on to BI Launch pad.
 2. Select the document that you want to view/edit.

The documents are displayed under *Shared with me* or *Shared by me* or *All* inbox.

3. Choose .
4. Choose *View* or double-click on the document.

The Lumira document opens in the Lumira story viewer.

5. Choose .

6. In the *Export as File* dialog, perform the following:
 - a. Select *Format* as PDF.

PDF is the default format
 - b. In the *Pages* option, you can select one of the following:
 - *All*: Exports all the pages in the document.
 - *Range*: Enter the range of pages that you want to export. The range entered should be in the following format: **<Start Page> - <End Page>**.
 - c. In the *Dataset Filters* option, select one of the following:
 - *Do not display*
 - *Display in appendix*
7. Chose *Export*.

3.13 Configuring User Preferences

SAP Lumira, server for teams now provides an option to store the user preferences. This helps users to quickly access frequently used pages.

1. Log on to SAP Lumira, server for teams.
2. In the right pane, under *Welcome <Username>* dropdown list, select *Settings*.
If you are an administrator, you can see *Welcome Administrator* displayed.
3. Choose *Preferences*.
4. In the *Default Landing* pane, select the page that should appear by default whenever you log on to SAP Lumira, server for teams.

Note

- As an end user, you can set any section under *My Files* as default.
- As an administrator, you can set any section under *My Files* and *Administration* as default.

3.14 Customizing the Views

Each SAP Lumira, server for teams page has a standard view. You can change the view to suit your own requirements and preferences. This view helps you to quickly access the data that you are looking for.

1. Log on to SAP Lumira, server for teams as *Administrator*.
2. In the *My files* pane, choose one of the following pages that you want to customize the views for:
 - Shared with me
 - Shared by me
 - All

3. Open the page by double clicking on it.
4. Right click on the column header of the page in question and select the column that you want to show/hide.

If you want to show the Shared with column in your page for example, you select this option.

Note

You can also adjust the column width and order of the column.

The changes you have made are saved in the system. When you log on to SAP Lumira, server for teams again, the views of these pages will be populated accordingly.

3.15 Behavior of Sample Documents

Providing sample documents is an indirect method of proving a better explanation of the concept. You can perform the following actions on sample documents in SAP Lumira, server for teams:

- Edit and Save As the document

Note

Save is disabled for sample documents.

- Export a story to PDF for sharing
- Super administrators can delete the document.

3.16 Configuring Bookmark

SAP Lumira, server for teams provides you with an option to make changes to the stories in a Lumira document in the story viewer and to store them as Bookmark. These Bookmark are available in the document once created. When you open a document in Lumira story viewer, you can filter data based on your requirement by applying filters. You can then save this state of the document as Bookmark.

Note

Bookmark consists of all the stories in the document and filters applied to the story by the users.

For example, you have a document which provides information on the populations of various cities around the world. You want to share this information with your colleagues located in various cities. They are only interested in viewing information related to their particular city however. You can share this document with your colleagues, and they can filter data related to cities that interest them and save them as Bookmark. This helps your colleague to avoid creating multiple copies of the document or stories. It also allows them to switch between different Bookmark and to explore the data that is of interest to them.

You can create two kinds of Bookmark:

- **Personal Bookmark:** This Bookmark is only visible to the user who created it.
- **Global Bookmark:** This Bookmark is visible to all users who can access the document.

3.16.1 Creating a Bookmark

Creating a Bookmark allows you to save any filter that you have applied to the story, without creating a copy of a document.

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.

Documents are displayed under *Shared with me* or *Shared by me* or *All inbox*.

3. Add input controls available on the story.


Or

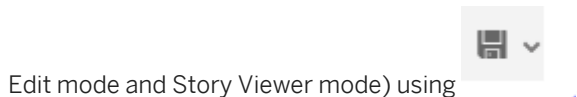


4. Choose the required filter.

The Filter dialog appears. The dialog box displays the list of filters you entered during acquisition of data. You can filter the document by specifying the values that you want to Bookmark. You can specify values by typing them, selecting them from the list of values, or searching the list for the values that you are interested in.

5. If you want to save a *Bookmark*, then select *Bookmark*.
6. If you want to save a copy of a Bookmark, then select *Bookmark As*.
 - a. Enter a name for the Bookmark.
 - b. If you want to create a Personal Bookmark, select the *Personal Bookmark* button.
 - c. If you want to create a Global Bookmark, select the *Global Bookmark* button.
 - d. Choose *Done*.

The 'Save' and 'Save As' options are disabled for Bookmark. You therefore see this  disabled when you try to save a Bookmark in Lumira story viewer. You can save changes that you make to the document (both in



3.16.2 Setting a Bookmark as Default

1. Log on to SAP Lumira, server for teams.
2. Double click on the document.

The documents are displayed under *Shared with me* or *Shared by me* or *All inbox*.

3. To set a Bookmark as default, select it from the Bookmark dropdown list.
4. Choose the *Default Bookmark* option to see that Bookmark every time you open a document.

3.16.3 Deleting a Bookmark

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document that you want to delete.

Documents are displayed under [Shared with me](#) or [Shared by me](#) or [All inbox](#).

3. To delete a Bookmark, select it from the Bookmark dropdown list.
4. Hover over the Bookmark that you want to delete and choose the cross mark.

The [Delete View](#) dialog appears.

5. Choose [Delete](#).

3.16.4 Changing a Bookmark Type

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.

The documents are displayed under [Shared with me](#) or [Shared by me](#) or [All inbox](#).

3. If you want change a Bookmark type, select the Bookmark from the Bookmark dropdown list.
4. Select [Bookmark As](#).
 - a. Enter a name for a [Bookmark](#).
 - b. If you want to change the Bookmark type from Global to Personal, then select the [Personal](#) button.
 - c. If you want to change the Bookmark type from Personal to Global, then select the [Global](#) button.
 - d. Choose [Done](#).

If you enter an existing name for the new Bookmark, then you are informed that the Bookmark already exists and whether you want to overwrite it. You can choose [Yes or No](#). Depending on your input, the system performs the required action.


3.16.5 Changing Filters for Bookmark

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.

Documents are displayed under [Shared with me](#) or [Shared by me](#) or [All inbox](#).

3. If you want to make changes to a Bookmark, select it from the Bookmark dropdown list.



4. Choose  icon and make the required changes to filters.
or


Add input controls available in the story.

5. If you want to save a Bookmark, choose [Bookmark](#).
6. If you want to create a copy of a Bookmark, choose [Bookmark As](#).

3.16.6 Switching from View Mode to Edit Mode

The only modifications that you can perform on a Bookmark is applying input controls and adding filters to it. If you want to make any modifications to a document however, you need to switch from View mode to Edit mode.

To switch from View mode to Edit mode, proceed as follows:

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.
3. Choose .
4. If you want to save a document, choose [Save](#).
5. If you want to create a copy of a document, Choose [Save As](#).

3.17 Configuring OpenDocument Functionality

With OpenDocument functionality, you can generate direct links for opening Lumira documents and specific content within them. After creating a hyperlink with OpenDocument functionality, you can share it with other users. Users who access these hyperlinks can open the documents and content within them if they have the relevant authorizations.

Advantages

- Provide end users with hyperlinks to a document via e-mail or by other means.
- Embed hyperlinks from one document to another.

3.17.1 Parameters Used for Creating an OpenDocument URL

Basic URL syntax

The basic syntax for an OpenDocument URL is as follows:

Sample Code

```
http://<machine_name>:6405/sap/OpenDocument.html?iDocID=<DocumentCUID>
?<parameter1>
&<parameter2>
&...
&<parameterN>
```

User session

When a document is viewed using an OpenDocument URL, you are prompted for credentials except in the following cases:

- The OpenDocument URL uses a serSes or a token parameter
- The OpenDocument application has an existing user session for this browser session

Document Identifier Parameters

iDocID

Table 2:

Syntax	Description	Value
iDocID	Specifies the unique identifier of the viewable document in SAP Lumira, server for teams.	A numerical identifier associated with the document in SAP Lumira, server for teams.

SDocName

Table 3:

Syntax	Description	Value
sDocName	Specifies the name of the viewable document in SAP Lumira, server for teams.	The title of the document in SAP Lumira, server for teams.

sStoryName

Table 4:

Syntax	Description	Value
sStoryName	Specifies the story name of the viewable document in SAP Lumira, server for teams	The story name of the document in SAP Lumira, server for teams.

Refresh parameter

Table 5:

Syntax	Description	Value
sRefresh	Indicates whether a database refresh should be forced when the target document is opened.	<ul style="list-style-type: none">• T• F

Page Number

Table 6:

Syntax	Description	Value
sPageNumber	Open the specified page number in the story.	A valid page number. It should work with storyName parameter.

Note

- If you have not specified this parameter, you are taken to the default view, which is the first page of the first story or the story specified in the URL.
- If sPageNumber is invalid or does not exist in the story, you are taken to the default view.
- If you add both sPageNumber and sPageName in the OpenDocument URL, sPageNumber always takes a higher precedence.

Example

This example opens the “Company Portfolio” story and takes you to first page of the company portfolio story.

Sample Code

```
http://<machine_name>:6405/sap/OpenDocument.html?iDocID=<DocumentCUID>
?sIDType=CUID
&iDocID=ASkYYVrvEBVEsRWU1_4BwL4
&storyName=Company Portfolio
```

Page Name

Table 7:

Syntax	Description	Value
sPageName	Open the specified page name in the story.	A valid page name. It is case sensitive. It should work with storyName parameter

Note

- If you have not specified this parameter, you are taken to the default view, which is usually the first page of the first story in the document or the story specified in the URL.
- If sPageName does not exist in the story, you are taken to the original view.
- If more than one page has the same name, the smaller page number takes a higher precedence.
- If you add sPageNumber and sPageName in the OpenDocument URL, sPageNumber always takes a higher precedence.

Example

This example opens the “Profit and Loss Report” story and takes you to the “Q3 Summary” page.

Sample Code

```
http://<machine_name>:6405/sap/OpenDocument.html?iDocID=<DocumentCUID>
?sIDType=CUID
&iDocID=ASkYYVrvEBVEsRWU1_4BwL4
&storyName=Profit and Loss Report
&sPageNumber=3
&sPageName=Q3 Summary
```

3.17.2 Sharing the OpenDocument URL

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.

The documents are displayed under *Shared with me* or *Shared by me* or the *All* inbox.

3. Choose *Share*.
4. Copy the OpenDocument URL that you want to share.
5. Choose *Done*.

Once you have copied the OpenDocument URL, it is saved in the clipboard. You can copy the URL from the clipboard and share it with other users, or use it to view documents and content within them.

3.17.3 Viewing the OpenDocument URL

When you click the OpenDocument URL, you are directed to Lumira story viewer page by default. If you have defined any other parameters in the URL however, clicking the link takes you to the defined destination. Depending on the parameters that you have defined in the OpenDocument URL, you can:

- View a document
- View a specific story in a document
- View a specific page of a story in a document

If you have specified a particular story in the URL for example, clicking the URL open this story in the document.

i Note

You can perform various actions on OpenDocument URL depending on the rights assigned to you.

3.18 Purging Lumira documents while saving them to SAP Lumira, server for teams

Purging of Lumira document allows you to save document without the sensitive data in the document. Purging is useful if Lumira documents connect to data sources that have row-level security. Purging data while saving is supported only for the following data sources:

- Universes

i Note

Only UNX is supported

- SAP BW Offline
- SAP HANA Offline

i Note

- If you have purged a document while saving it, the system automatically refreshes it when it is opened in Lumira server for teams.
- Lumira documents that connect to SAP HANA in online mode do not contain any data while saving. They therefore do not require purging.

If you have purged a Lumira document while saving in Lumira desktop for example, the system automatically refreshes when you open the document in SAP Lumira, server for teams. Once the refresh is performed, the system loads data into Lumira document.

Advantage

Prevent sharing of confidential or restricted data with unauthorized users. As a report designer for example, the data that you need in Lumira document is test data which makes no sense to business users. You would therefore like to save the document without data to SAP Lumira, server for teams as a template. Business users can then open the Lumira document and choose [Save As](#) in order to save the document with the data they require.

3.18.1 Purging and Saving Lumira documents

1. Log on to SAP Lumira, server for teams.
2. Double-click on the document.

The document opens. If this document is already purged while saving in Lumira desktop, the system automatically refreshes it. Once refreshed, the system loads the data into the Lumira document, and you can perform one of the following activities:

3. Choose the [Save without Data](#) option to purge all the data sets from the document.
4. Choose the [Save As](#) option and perform the following activities:
 - a. Enter a name for the document.
 - b. Add a description (optional).
 - c. Choose the [Save without Data](#) option to purge all data sets from the document.

Note

The [Save without Data](#) option is displayed for data sources in Lumira documents that contain row-level security.

- d. Navigate to the required folder and choose [Save As](#) to save the document to a selected folder.

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