This process will vary somewhat depending on your permissions and/or selected preferences. If you want to save a copy in the Excel or PDF format, please see the help document 'How to Save Documents / Reports as Excel, CSV, or PDF.'

- If you open your **Preferences** > **Web Intelligence** and see only **HTML** as a **View** and **Modify** interface option, you can use **Options #1** and **#2** below.
- If you open your **Preferences** > **Web Intelligence** and see **Applet** as an option, select it, **Save & Close**, refresh your page, and then you can use **Options #1** and **#3** below.

Step-by-Step Instructions	HINTS
Log on to BI Launch Pad: xxx	• If you need to modify a corporate report, and you want to save your changes for future use, you will first need to save a copy of it to your personal **My Favorites** folder**.** • **NOTE:** Most users cannot create, save to, or delete from the **Public Folders** unless they have special editing privileges.
Option #1: (HTML & Applet) Right-click on the title of the document that you want to copy.	• Do NOT open the document for this option. • You will be saving the entire document, not just one of its reports.
Select **Organize** > **Copy.**	Contextual drop-down menu appears. (**Figure 1**)
Navigate to **My Favorites** folder, click on **Organize** > **Paste.**	• Now you can edit the report, and a regular **Save** will save it back to that same **My Favorites** folder. • The document is saved to **My Favorites** in BI4 format. (**Figure 2**)
Option #2: (HTML) Open the document that you want to copy in either **Reading** or **Design** mode.	• You will be saving the entire document, not just one of its reports.
Click on the **Save** icon and select **Save As** from the drop-down menu	• The **Save As** box displays. (**Figure 4**)
Select **Favorites Folder** panel and then change the **File Name** if desired.	You could select one of the **Public Folders** for the saving location but unless you have special editing privileges, you will receive an error when you click the **Save** button.
Click the **Save** button**.**	The document is saved to **My Favorites** in BI4 format.

|	
Option #3: (Applet) Open the document that you want to copy in either **Reading** or **Design** mode.	This option also allows you to save a copy in Excel or PDF format to your own desktop.
Click on the **Save** icon and select **Save As** from the drop-down menu	The **Save Document** box displays. (**Figure 3**) (Note that this dialog box is different than the **Save As** box!)
Select **bobiprod** and **My Favorites** as the location for saving	You may want to consider changing the name slightly; once you edit the report it will actually be a different report from the original. (**Figure 5**)
Click **Save**	Now you can edit the report in Business Intelligence, and a regular **Save** will save it back to that same **My Favorites** folder for future use**.**

! ATTENTION -- BEST PRACTICE !

When you are saving a document/report, consider whether you really need to save it with the data in it, and if not, **purge the data before you save it**! You should only save copies if you plan to change the original corporate report. **Shortcuts** are a handy way to save a pointer to the report in your favorites folder without actually making a copy.
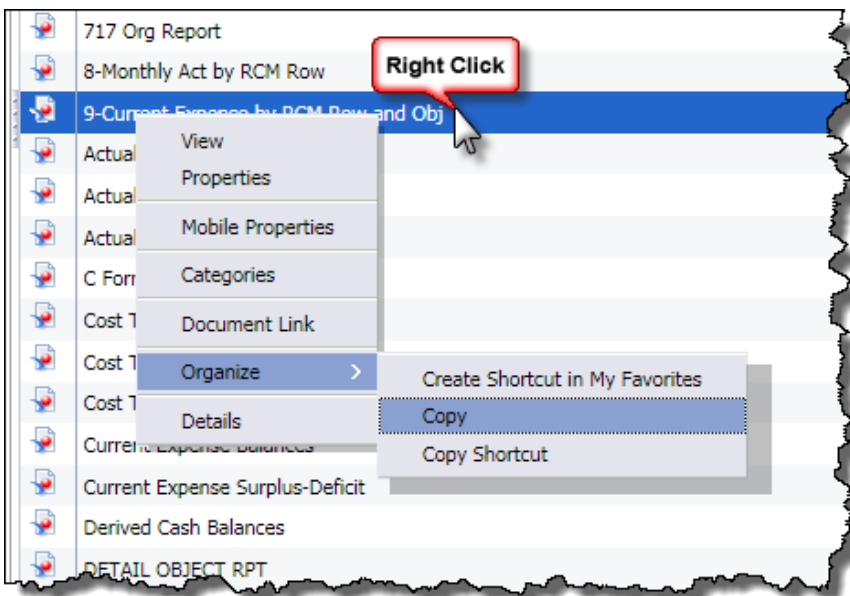
OPTION #1 (HTML or Applet)

FIGURE 1: Right-clicking on the title of the document that you want to copy displays the drop-down with **Organize** > **Copy**.
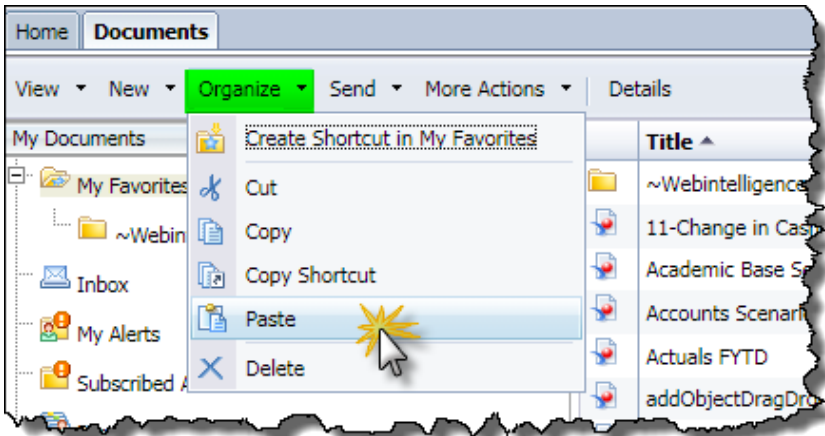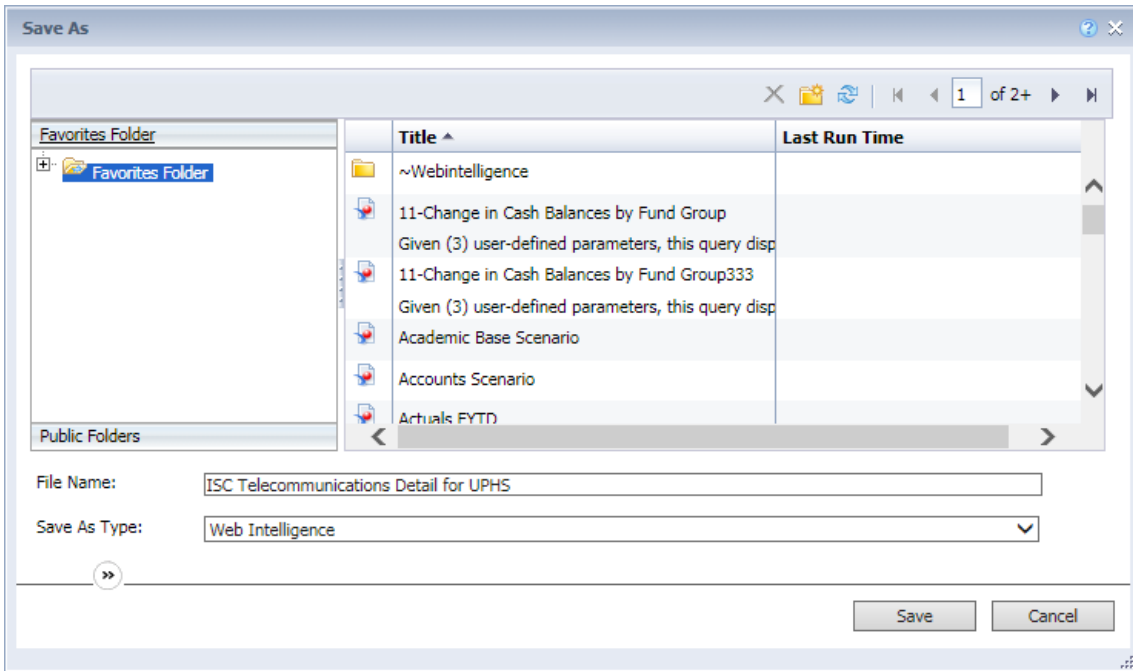
OPTION #1 (HTML or Applet)

FIGURE 2: Navigate to **My Favorites**, click **Organize** > **Paste**.
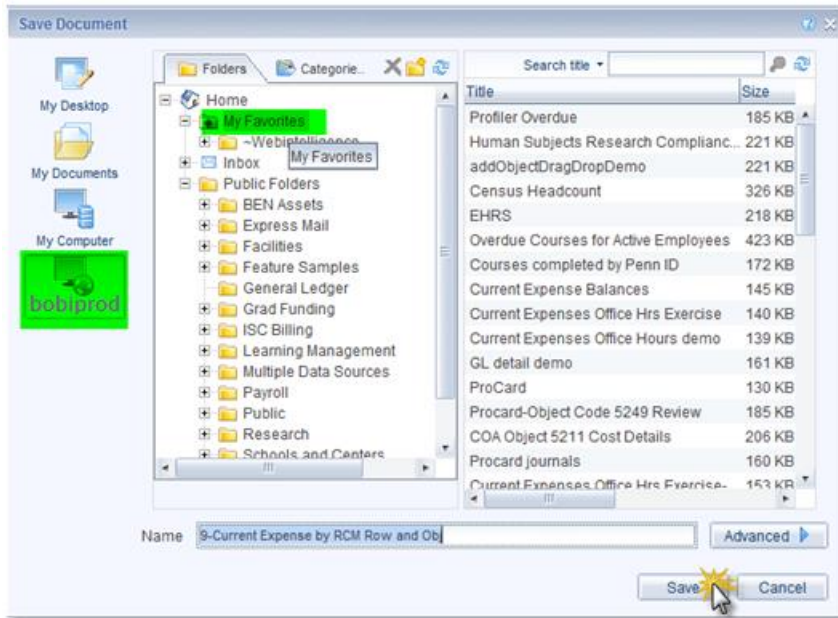

OPTION #2 &#3

FIGURE 3: Select **Save** > **Save As.**

OPTION #2 (HTML)

FIGURE 4: Open the **Favorites Folder** and change the **File Name** if desired. Then click **Save**.

OPTION #3 (Applet)

FIGURE 5: Select **bobiprod**, then **My Favorites**, think about whether you want to alter the **Name**, and then click **Save**. Now you have a copy of the report that you can edit and save your edits for future use.