

WebFOCUS

WebFOCUS App Studio

User's Manual

Release 8.2

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Preface

This documentation describes WebFOCUS App Studio, a Windows-based GUI development environment for creating WebFOCUS applications. App Studio provides innovative features and functions that simplify development, thereby allowing you to concentrate on interface design, business logic, and data manipulation. Features include data visualization, color exception reporting, intelligent drill downs, and the ability to generate HTML pages without writing code.

How This Manual Is Organized

This manual includes the following chapters:

Chapter/Appendix		Contents
1	Introducing WebFOCUS App Studio	Introduces WebFOCUS App Studio.
2	Navigating the WebFOCUS App Studio Interface	Identifies the main components of the App Studio interface.
3	Creating and Editing Metadata in WebFOCUS App Studio	Describes how to create and edit metadata in App Studio.
4	Creating Reports in WebFOCUS App Studio	Describes how to launch the Report Wizard to create reports, the types of reports you can create with App Studio, and the tabs and panels that are available when you are developing reports in the Report canvas.
5	Creating Charts in WebFOCUS App Studio	Describes how to launch the Chart Wizard to create charts and the types of charts you can create with App Studio.
6	Creating Procedures in WebFOCUS App Studio	Describes the Join tab, creating and working with joins, creating procedures, and the Procedure View panel.
7	Creating Visualizations in WebFOCUS App Studio	Describes how to create visualizations in WebFOCUS App Studio.
8	Creating HTML Pages in WebFOCUS App Studio	Describes how to launch the HTML/Document Wizard, and how to create and edit HTML pages.
9	Creating Documents in WebFOCUS App Studio	Describes how to launch the HTML/Document Wizard, and how to create and edit documents.

Chapter/Appendix	Contents
10 Integrating Location Intelligence in WebFOCUS App Studio	
11 Creating, Viewing, and Editing Source Syntax in WebFOCUS App Studio	Describes the Text Editor that is available when you are developing the source syntax for procedures, procedure components, and other types of files.
A Troubleshooting App Studio	Provides troubleshooting tips and information on using verification and tracing tools.

Documentation Conventions

The following table describes the documentation conventions that are used in this manual.

Convention	Description
THIS TYPEFACE or <i>this typeface</i>	Denotes syntax that you must enter exactly as shown.
<i>this typeface</i>	Represents a placeholder (or variable) in syntax for a value that you or the system must supply.
<u>underscore</u>	Indicates a default setting.
<i>this typeface</i>	Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.
Key + Key	Indicates keys that you must press simultaneously.
{ }	Indicates two or three choices. Type one of them, not the braces.
[]	Indicates a group of optional parameters. None are required, but you may select one of them. Type only the parameter in the brackets, not the brackets.

Convention	Description
	Separates mutually exclusive choices in syntax. Type one of them, not the symbol.
...	Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).
.	Indicates that there are (or could be) intervening or additional commands.

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To learn about the full range of available support services, ask your Information Builders representative about InfoResponse Online, or call (800) 969-INFO.

Information You Should Have

To help our consultants answer your questions effectively, be prepared to provide the following information when you call:

- ☐ Your six-digit site code (xxxx.xx).
- ☐ Your WebFOCUS configuration:
 - ☐ The front-end software you are using, including vendor and release.
 - ☐ The communications protocol (for example, TCP/IP or HLLAPI), including vendor and release.
 - ☐ The software release.
 - ☐ Your server version and release. You can find this information using the Version option in the Web Console.
- ☐ The stored procedure (preferably with line numbers) or SQL statements being used in server access.
- ☐ The Master File and Access File.
- ☐ The exact nature of the problem:
 - ☐ Are the results or the format incorrect? Are the text or calculations missing or misplaced?
 - ☐ Provide the error message and return code, if applicable.
 - ☐ Is this related to any other problem?
- ☐ Has the procedure or query ever worked in its present form? Has it been changed recently? How often does the problem occur?
- ☐ What release of the operating system are you using? Has it, your security system, communications protocol, or front-end software changed?
- ☐ Is this problem reproducible? If so, how?
- ☐ Have you tried to reproduce your problem in the simplest form possible? For example, if you are having problems joining two data sources, have you tried executing a query containing just the code to access the data source?
- ☐ Do you have a trace file?

- ❑ How is the problem affecting your business? Is it halting development or production? Do you just have questions about functionality or documentation?

User Feedback

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Introducing WebFOCUS App Studio

WebFOCUS is a complete, web-ready data access and reporting system that connects users to data. It accesses and processes information located in any format, on any platform, and presents that information to end users through a web browser.

Business intelligence (BI) needs continue to evolve, as organizations seek to make more information from more sources available to more people inside and outside the enterprise. Developers need powerful, yet flexible tools in order to satisfy the increasingly sophisticated BI content demands posed by a growing number of employees, customers, suppliers, partners, and other stakeholders.

WebFOCUS App Studio is the new Windows-based graphical user interface (GUI) environment for creating advanced WebFOCUS applications. WebFOCUS App Studio is the most robust BI application development platform on the market today.

In this chapter:

- ❑ [What Is WebFOCUS App Studio?](#)
- ❑ [Launching App Studio](#)
- ❑ [WebFOCUS App Studio Documentation Overview](#)

What Is WebFOCUS App Studio?

Building on the industry-familiar Microsoft Office Ribbon Interface, WebFOCUS App Studio offers a simplified user experience and workflow, empowering developers to create application content immediately, without a costly and time-consuming learning curve. Additionally, it dramatically increases development efficiency by eliminating the need for developers to utilize multiple tools to piece together a BI application.

WebFOCUS App Studio provides:

- ❑ **Rapid deployment.** Installation and setup are fast and simple.
- ❑ **Ease of use.** A familiar ribbon interface, which can be customized to individual preferences, allows users to get up to speed quickly.

- ❑ **Maximum flexibility.** Build and deploy ad hoc or instant queries that go beyond the prescriptions of any particular application. Developers can also add dimensions to data structures at any time without affecting other queries, since the underlying data source is not changed.
- ❑ **Support for complex requests.** Unlike other BI development environments, which require the use of complex code to handle anything more than the most simple of requests, App Studio allows users to create any request, no matter how sophisticated, using the same intuitive interface.

App Studio eliminates the complex multi-tool paradigm that exists with most other development solutions, providing a single, fully-integrated environment for rapidly designing and creating reports, dashboards, InfoApps, and other types of BI apps and content, including:

- ❑ Income statements, balance sheets, and other types of tabular or financial reports.
- ❑ Charts and visualizations. A library of more than 120 HTML5 chart types meet the needs of every information consumer.
- ❑ Dashboards that draw data from one source, or multiple disparate systems. Dashboards can be viewed online or offline in disconnected mode, with full interactivity and analytical capabilities.
- ❑ Documents for print, including Adobe PDF, interactive PDF, Microsoft PowerPoint, and more.
- ❑ InfoApps, business intelligence applications that are form-driven and extremely simple to use, providing the most effective way to make information accessible to all stakeholders, as well as for custom and SaaS implementations.
- ❑ Mobile BI applications that run on any device and on any platform.
- ❑ Responsive designs that conform to the device form factor, maximizing the user experience.
- ❑ Metadata creation and modeling, such as multifact star schemas, joins, and business views.

App Studio Capabilities

In App Studio, you can do the following:

Access data and descriptions. Using the Metadata canvas, you can create new synonyms, and view or modify existing synonyms, in a graphical user interface. Synonyms enable you to access and interpret data sources for use in reporting applications. Capabilities include metadata design and development, with full visual modeling of schemas.

Create reporting applications. Build reporting procedures in the Report Canvas, Chart Canvas, HTML Canvas, or Document Canvas, which can include the following components.

- ❑ **Reports.** Display your data in a tabular format. You can create standalone reporting procedures, or add the report to a document or an HTML page.
- ❑ **Charts.** Communicate your data in a more illustrative format. You can translate complex data into an easy-to-read and understandable visual format. This often provides a new perspective to the information that users view. You can create standalone charting procedures or add the chart to a document or an HTML page.
- ❑ **HTML pages.** Build webpages for users to launch, view, and analyze data. You can add multiple reports and charting procedures to an HTML page, in addition to the controls that enable you to manipulate the data. You can also apply styling through the use of cascading style sheets (CSS), JavaScript files, and jQuery animations.
- ❑ **Documents.** Combine multiple report and charting procedures in a single output that you can organize and format. You can also add pre-process and post-process codes to customize how your document is executed.
- ❑ **Visualizations.** Create charts, maps, and grids to visually represent your data. You can add multiple visuals to the canvas to create a complete visualization, and you can update, change, or revise the visualization at any time to account for shifts in data needs.
- ❑ **Alerts.** Create event-driven procedures that apply test conditions and then trigger customized reports if the test conditions are true. You can schedule an Alert using ReportCaster Distribution Methods.
- ❑ **Reporting Objects.** Transform complex views of data into simple objects that are labeled with common business terminology for users to understand and use as templates to create their own reports.

Customize reporting applications. In addition to customizing your reporting applications by applying styling and color, you can add the following components to a procedure.

- ❑ **Virtual fields (DEFINE or COMPUTE statements).** Create temporary fields that are treated as real fields stored in the data source.
- ❑ **Define functions.** Create user functions that you can use in components of a procedure. You can retrieve your stored functions from the Functions Arguments dialog box.
- ❑ **Joins.** Define relationships between two or more data sources so that a report can use the data from all sources at once. You can also merge data sources by creating logical expressions on the Match canvas.

- ❑ **OLAP hierarchies.** Create temporary OLAP hierarchies and dimensions for a procedure.

Manage your environment. You can apply the following functions to your reporting applications to change the behavior of your environment.

- ❑ **Set.** Control the way that reports and charts appear on the screen or printer, the content of reports and charts, data retrieval characteristics that affect performance, and system responses to user requests. The Set component also helps you to set up your metadata and manipulate information, such as dates. Use the Set component to override default settings for your procedure.
- ❑ **Allocation.** Assign logical names and storage locations to the files that you create and use in WebFOCUS.
- ❑ **Use.** Identify a FOCUS data source to use in your procedure.

WebFOCUS Architecture

This topic briefly explains the main WebFOCUS components and implementations. For a complete description of WebFOCUS, see the WebFOCUS documentation.

WebFOCUS and Your Network

WebFOCUS integrates into your existing network by connecting your web server to your data. End users access WebFOCUS applications through a web browser, so they need only the following elements:

- ❑ **Web browser.** To access WebFOCUS applications, users need a browser and a TCP/IP connection to a web server.
- ❑ **Web server.** Web servers handle requests by returning files to a browser or by executing processes that provide additional functionality. You can provide WebFOCUS functionality by connecting to the web server using Java servlet calls.
- ❑ **Data.** WebFOCUS can access data from almost anywhere. Once you have configured data access and described that data, you can report on it.

WebFOCUS Components

There are two main WebFOCUS components.

- ❑ **WebFOCUS Client.** The WebFOCUS Client resides on the web server and connects WebFOCUS to the web through Java servlets. When a user makes a request from App Studio or a browser, the WebFOCUS Client receives and processes the request by passing it to the Reporting Server.

Note: When you perform a full App Studio installation for standalone development, you do not have to install the WebFOCUS Client separately because it is packaged with App Studio.

A standalone development environment is typically one in which all software components (the web server, WebFOCUS Client, and Reporting Server) are installed on the same local machine. This configuration gives you access to all your application files and data from a single machine. You do not need a physical network connection to access any other machine in order to accomplish your development tasks.

- ❑ **WebFOCUS Reporting Server.** The Reporting Server resides on machines that can access your data. The Reporting Server provides data access, number crunching, and report generation functionality.

WebFOCUS Configuration

WebFOCUS employs a distributed architecture, so the WebFOCUS Client, Reporting Server, and your data can be located on any platform, anywhere in your network.

You can easily connect an Apache™ web server running on UNIX to SQL Server data on Windows, or DB2 data on z/OS. Any number of WebFOCUS Reporting Servers can be connected to the WebFOCUS Client. WebFOCUS can report on all of them.

Configuring a distributed architecture requires the following:

- ❑ The WebFOCUS Client must reside on a machine with a web server.
- ❑ An instance of the Reporting Server must be installed on machines with your data, or machines that have access to your data.

App Studio Architecture

This topic briefly explains the main App Studio components and implementations.

WebFOCUS App Studio includes the following components:

- ❑ **App Studio Graphical User Interface (GUI).** Graphical development and code generation features for application development.
- ❑ **WebFOCUS Reporting Server.** A basic Reporting Server for local processing, standalone development, access to data, report generation, chart generation, and running requests.
- ❑ **WebFOCUS Client.** A scaled-down WebFOCUS Client with available functionality that is based on the App Studio edition you license.

- ❑ **Derby database.** An embedded database that stores user accounts and policies required for the connection of App Studio to its local WebFOCUS Client. Derby is only installed in App Studio editions that are licensed for local/standalone development. It is used for authentication, and comes with preloaded user IDs that possess developer and administration permissions.

Note: If you install App Studio on the same machine as WebFOCUS 8, you can configure App Studio to utilize the WebFOCUS 8 Derby database.

Reference: App Studio Directory Structure

This topic references the App Studio directory structure created after installation. The default directory is `drive:\ibi`.

`\apps`

Contains directories and data. By default, this is the Application Root directory (APPROOT directory) in which WebFOCUS searches for application files. Sample files are provided in the `\ibinccn` and `\ibisamp` directories.

The Application Root directory is created during the installation of App Studio and the WebFOCUS Reporting Server.

It is defined by the APPROOT variable in the server configuration file, `edaserve.cfg`, and the `IBI_Approot_Directory` variable that is defined during the WebFOCUS installation. These variables point to the Application Root directory for applications that reside on the web server where WebFOCUS is installed.

For Project-based development (optional), the Application Root directories must point to the same location.

`\AppStudio82`

Contains the graphical front-end components for creating App Studio content.

`\AppStudio82\srv\home`

Contains the local Reporting Server files.

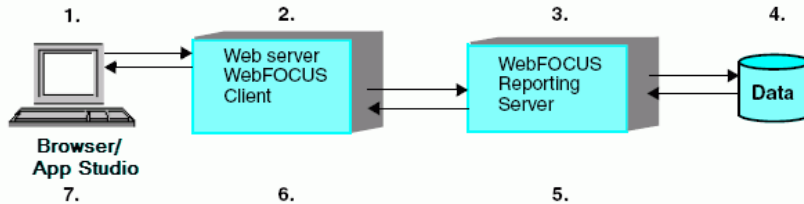
`\AppStudio82\derby`

Contains the Derby database files.

For more information, see the *App Studio Directory Structure* topic in the *WebFOCUS App Studio Installation and Configuration Guide*.

WebFOCUS and App Studio Processing

The following figure illustrates how WebFOCUS and App Studio process requests. Each step is explained below the figure.



1. A user makes a request and passes parameters by calling a WebFOCUS Servlet through links and forms on a webpage, or through App Studio.
2. The request and parameters come to the WebFOCUS Client on the web or application server, which processes the parameters and creates a request for the Reporting Server.
3. The Reporting Server receives the request, processes it, and accesses any necessary data.
4. Data is retrieved from data sources to process the request.
5. The Reporting Server processes the user request using the retrieved data.
6. The response is returned to the WebFOCUS Client on the web or application server.
7. The response is returned to the user.

App Studio processes requests the same way that WebFOCUS does:

- ❑ To access WebFOCUS or a remote Reporting Server, App Studio calls a servlet on a remote web or application server.
- ❑ To process requests using the local WebFOCUS Client and Reporting Server installed with App Studio, App Studio calls the local Reporting Server through a local web or application server using a servlet. Therefore, to run reports locally, your machine requires a web server.

App Studio Development Modes

App Studio allows local (standalone) development and development against a remote environment. From the Environments Tree panel, you can develop applications locally on your machine, or against a remote WebFOCUS environment.

In App Studio, you build applications consisting of different kinds of files. You can create the application as a standalone application in a development environment or as a web-based self-service application.

With a full App Studio installation, you can do the following:

- ❑ Locally develop self-service applications from the Projects area (optional).

Standalone Project-based development requires installation of a Reporting Server on the same machine as App Studio. A WebFOCUS Client is also required for Project-based development. The files that you create for a local project reside in a subdirectory under APPROOT as described earlier. In Project-based development, the Application Root directories (APPROOT directories) must point to the same directory.

- ❑ Connect to one or more remote servers and modify existing self-service applications on those servers. For example, you can add a reporting procedure to an existing application.
- ❑ Configure access to one or more WebFOCUS environments so you can manage resources on the WebFOCUS Client and Reporting Server, and in the Repository (if Managed Reporting is installed). For example, you can create and edit procedures, metadata, HTML files, and more.

Note: If you do not have a Reporting Server and WebFOCUS Client on your development machine (for example, the Managed Reporting Application edition of App Studio), your environment allows the last two capabilities.

Project-Based Development

App Studio supports two configurations for Project-based development (optional):

- ❑ In the first configuration, App Studio, Reporting Server, and WebFOCUS Client are installed on the same machine (a *full* installation). This WebFOCUS environment is referred to as *localhost*, which describes your local machine.

Note: When configuring a WebFOCUS environment, provide a full domain for the host name, including top-level domain name, second-level domain, and subdomains as specified by your organization (for example, *hostname.companyname.com*). This format is recommended to ensure that requests are properly resolved and redirected. In this environment, the project files that you create reside in a subdirectory under the Application Root directory (APPROOT directory).

For information about other required components that you must install, such as Java SDK and a servlet engine, see the *WebFOCUS App Studio Installation and Configuration Guide*. All required components are packaged with App Studio.

A full App Studio installation also allows Project-based development (optional) against a remote WebFOCUS environment. In this case, App Studio does not utilize the local Reporting Server or its local WebFOCUS Client. It utilizes these components from the remote WebFOCUS environment.

- ❑ In the second configuration, you can use a remote WebFOCUS installation for Project-based development (optional). App Studio is installed on a local machine (a *thin* installation), and the WebFOCUS components (which includes a Reporting Server and WebFOCUS Client that resides on the web server) are installed on remote machines.

Use of a remote environment for Project-based development requires the following:

- ❑ The Reporting Server must be at a supported release level.
- ❑ The Reporting Server must be installed on a supported Windows or UNIX platform.
- ❑ The Reporting Server and the WebFOCUS Client must be properly configured and the APPROOT variable must point to the same physical location.
- ❑ You must have read/write permission to the Reporting Server and the WebFOCUS Client.

Reference: Summary of Steps for Project-Based Development

To create a new project in the Projects node (optional), follow these steps:

1. **Install App Studio.** Use the installation program to install App Studio (this includes a Reporting Server for standalone development) on your Windows machine.
2. **Configure the web server.** For local/standalone development, configure aliases and servlet functionality on the local web server.
3. **Configure communications and data access.** Set up remote access to Reporting Servers, and create or copy data source descriptions. You must also set up data adapters to access other data sources, such as relational databases.
4. **Create a project in the Projects node of the desired environment.** Before you begin Project-based development, you must create a project directory to store the associated files. You create this directory using the Project Wizard.

Use the Project Wizard to name the project, designate a directory for it, and optionally, add other directory paths from which the project can retrieve information or paths to other resources.

Sample projects are provided for editions that allow local/standalone development. When working against a remote WebFOCUS environment you do not see any sample projects, by default.

5. **Create, develop, and test the project components.** Open the project, create its components (procedures, data source synonyms, HTML files, and related files), and develop and test them on the Reporting Server and web server.

For more information about installing App Studio, configuring the web server, and configuring communications and data access, see the *WebFOCUS App Studio Installation and Configuration Guide*.

Remote Development

App Studio provides the following scenarios for remote development:

- ❑ Use the Data Servers area to develop applications directly on the Reporting Server and edit resources in place against remote environments.
- ❑ Use the Repository area to access the Managed Reporting repository. From here, you can develop and manage Managed Reporting applications against a configured WebFOCUS environment.
- ❑ Use the Web Applications area to manage resources on the web tier, and edit the resources in place against remote environments. HTML pages, cascading style sheets (CSS), and other web components can be stored in the Web Applications node. You can view and modify files with an editor.

Reference: Summary of Steps for Remote Development

To create a new application on a server platform:

1. **Install App Studio.** Use the installation program to install App Studio on your Windows machine.
2. **Add a WebFOCUS environment.** Add an environment from the WebFOCUS Environment Properties dialog box. For more information, see [How to Add a WebFOCUS Environment](#) on page 113.
3. **Create an application folder on the server.** Create the application folder in the Data Servers area, or develop directly against the Repository.
4. **Create, develop, and test the application components.** Open the application, create its components (procedures, data source synonyms, HTML files, and related files), and develop and test them on the Reporting Server and WebFOCUS Client.

Launching App Studio

Once you have installed App Studio, you can launch the product and begin developing applications.

You can launch App Studio in one of the following ways:

- ❑ **Launch App Studio and the App Studio Reporting Server at the same time.** From the Start menu, expand the Information Builders program group, expand the WebFOCUS App Studio folder, and then click *WebFOCUS App Studio*. Both App Studio and the App Studio Reporting Server start at the same time.

When App Studio starts, the Reporting Server installed with App Studio is started with Security OFF.

- ❑ **Start your Reporting Server and then launch App Studio.** If you have installed a standalone version of App Studio, or a standalone Reporting Server for use with WebFOCUS, you can start your Reporting Server before launching App Studio.
- ❑ **Standalone App Studio.** From the Start menu, expand the Information Builders program group, expand the WebFOCUS 82 App Studio folder, and expand the WebFOCUS 82 Server for App Studio folder. Select *Start Security OFF* to start the Reporting Server without security, or *Start Security ON* to start the Reporting Server securely. The Reporting Server opens a command window. Once the process is complete, launch App Studio.
- ❑ **Standalone Reporting Server.** From the Start menu, expand the Information Builders program group, and expand the *WebFOCUS 82 Server* folder. Select *Start Security OFF* to start the Reporting Server without security, or *Start Security ON* to start the Reporting Server securely. The Reporting Server opens a command window. Once the process is complete, launch App Studio.

Note: Additional configuration steps are required if you choose to start the Reporting Server with Security ON. For more information, see the *WebFOCUS App Studio Installation and Configuration Guide*.

When App Studio first opens, you may be prompted to sign in to your localhost environment. You can enter the ID, *wfdesktop*, with no password. For more information, see [Navigating the WebFOCUS App Studio Interface](#) on page 49.

Note: If you have previously configured WebFOCUS environments on your machine, those environments appear when you launch App Studio.

WebFOCUS App Studio Documentation Overview

The following documentation components are available for App Studio users:

- ❑ *WebFOCUS App Studio Installation and Configuration Guide*

- ❑ *WebFOCUS App Studio User's Manual*

- ❑ Context-sensitive online Help system

You can access the online Help system through the product. Press F1 on your keyboard or click *Help* throughout the interface to open the Help window. The online Help system is designed to provide you all of the information that you need to develop content in App Studio.

- ❑ Help Wizard

You can access the Help Wizard by selecting the *Help Wizard* check box in the View group on the Home tab of the App Studio ribbon. By default, the Help Wizard panel opens in the bottom-right corner of the interface. The Help Wizard content dynamically changes, depending on where you are in the interface.

Navigating the WebFOCUS App Studio Interface

App Studio provides an easy-to-use interface for creating applications, such as reports, charts, HTML pages, and documents.

The first time you launch App Studio, a default interface opens. You can modify the default interface by customizing the appearance of the application window and rearranging the placement of the main interface components.

These changes are automatically saved and made available the next time you launch the product.

In this chapter:

- ❑ [Introducing the App Studio Interface](#)
 - ❑ [Initiating App Studio](#)
 - ❑ [Opening the Application Menu of File-Related Commands](#)
 - ❑ [Accessing Frequently Used Commands Using the Quick Access Toolbar](#)
 - ❑ [Developing Applications in the Canvas Area](#)
 - ❑ [Accessing Features and Functions With the App Studio Ribbon](#)
 - ❑ [Working With the Environments Tree Panel](#)
 - ❑ [Working With the Environments Detail Panel](#)
 - ❑ [Showing the Properties of a Folder or File Using the File/Folder Properties Panel](#)
 - ❑ [Editing Areas of Functionality Using the View Tabs](#)
 - ❑ [Customizing WebFOCUS App Studio Panels](#)
-

Introducing the App Studio Interface

The main components of the default App Studio interface are shown in the following image.



The App Studio interface components are identified as follows:

- ❑ **Welcome screen.** Introduces the new App Studio user interface and provides hyperlinks to get you started with the product. For more information, see [Initiating App Studio](#) on page 51.
- ❑ **Application button.** Provides access to the Application menu of file-related commands. For more information, see [Opening the Application Menu of File-Related Commands](#) on page 51.
- ❑ **Quick Access Toolbar.** Displays frequently used commands, such as Open, Save, Quick Print, Undo, Redo, Cut, Copy, Paste, and Run. For more information, see [Accessing Frequently Used Commands Using the Quick Access Toolbar](#) on page 69.

- ❑ **Ribbon.** Displays both static and contextual tabs of commands that you can use to build and customize applications. For more information, see [Accessing Features and Functions With the App Studio Ribbon](#) on page 83.
- ❑ **Environments Tree panel.** Provides access to the WebFOCUS environments you configure and files you create under each development area. For more information, see [Working With the Environments Tree Panel](#) on page 96.
- ❑ **Canvas.** Provides an active preview of your application development. For more information, see [Developing Applications in the Canvas Area](#) on page 74.

Initiating App Studio

When you initiate App Studio for the first time, the Welcome screen opens.


From the Welcome screen, you can access a PDF version of this manual, view the Getting Started video, or open the App Studio Information Center.

You can select the *Don't show this dialog again* check box to prevent the Welcome screen from opening the next time you launch App Studio.

Note: You can also control the appearance of the Welcome screen through the Options dialog box. For more information, see [Setting User Preferences Using the Options Dialog Box](#) on page 56.

Opening the Application Menu of File-Related Commands



The Application button, represented by the App Studio icon , opens the Application menu of file-related commands. You can open an existing document, save an active document, and print an active document. The Options button opens the App Studio Options dialog box, where you can set user preferences. The Application menu also lists recently opened documents. The Application button is always available. It is located in the upper-left corner of the App Studio interface.

Tip: Double-click the Application button to exit App Studio. If you exit App Studio in this way, active (open) applications will not be saved.

From the Application menu, you can perform the following actions:

- ❑ **Open.** Open an existing document. You can open a file from the list of configured WebFOCUS environments.

- ❑ **Save.** Save the active document.
- ❑ **Save As.** Save the active document with a new name.
- ❑ **Save All.** Save all open documents with the current file names. There will be no prompting for file names.
- ❑ **Run.** Run the report, chart, HTML page, or document. When you click the *Run* menu, the Message Viewer Options submenu opens.

From the Message Viewer Options submenu, you can select from among four Message Viewer Options that affect the App Studio Viewer display when a report, chart, HTML page, or document is run. The options are:

- ❑ When you select *Message Viewer OFF* and run a report, the App Studio Viewer window displays the report without any messages.
- ❑ When you select *Message Viewer ON* and run a report, the App Studio Viewer window displays the report and a message.
- ❑ When you select *Display command lines*, the App Studio Viewer window displays the report and the command lines.
- ❑ When you select *Display Dialogue Manager commands*, the App Studio Viewer window displays the report and the Dialogue Manager commands, and the result of their evaluation.
- ❑ **Print.** Print the active document. When you click the *Print* menu, the Preview and print the document submenu opens.

From the Preview and print the document submenu, you can print the active document using the current print options, preview the active document before printing, and configure your print options.

Note: The Print and Quick Print options are only available when you edit content in the Text Editor, or when the Source view tab, in the Report canvas, is active.

- ❑ **Close.** Close the active document.
- ❑ **Options.** Open the Options dialog box where you can set user preferences.
- ❑ **Exit.** Close the active document and exit App Studio.

Note:

- ❑ In the Application menu, the terms *document* and *active document* represent all files which you can create in App Studio.
- ❑ Spaces are not allowed in file names. When naming a report, chart, HTML page, or document in their respective wizards or in the Save As dialog box, spaces are replaced with underscores. When naming a procedure, spaces and underscores are not permitted and when you press the Space bar, nothing happens. If the repository is set to display by title, the wizards, Open dialog box, and Save As dialog box will still expect a proper name, with no spaces, to be entered.

Reference: Open File Dialog Box

The Open File dialog box opens when you click *Open* from the Application menu or the Quick Access toolbar.

The Open File dialog box displays files that you can open and edit in App Studio.

Configured Environments list

Contains a list of currently Configured Environments. You can navigate to different environments and development areas to display different files in the file list.

File list

Displays all files of a specific type in a selected folder and includes the name, size, type, last modified date, and location of the file.

Note: Instead of the regular Master File icon, Master Files that have a DEFINE use the DEFINE icon and Master Files that have a Join use the JOIN icon.

File name drop-down list

Use this text box to type the name of a file you want to open.

Note: If you are in the Repository section and the tree is set to display by title, the Open File dialog box will only require a name to be entered.

File Type drop-down list

Filters to display all files of a specified file type. You filter for .fex, .htm, .js, .css, .sch, .adr, .ad, .sty, .mnt, .txt, .lib, and All Files. You can also choose to display all files.

Show All Files in Associated Paths

Displays all files that are associated with the parent folder, when selected. Only one option, *Show all Files in Associated Paths* or *Show Files in Selected Path Only*, can be selected at a time.

Show Files in Selected Path Only

Displays only files in the current, selected folder. This option is selected by default. Only one option, *Show all Files in Associated Paths* or *Show Files in Selected Path Only*, can be selected at a time.

Use Qualified Path

When selected, the fully qualified path name of the file you select will be used.

Note: This check box appears only in the Report and Chart Wizard.

Show Tree

When selected, displays the Environment Tree. This option is only available when opening a file using commands and features in the Report canvas, HTML canvas, Document canvas, Join canvas, and the Procedure View panel.

Details Toggle

Toggles between displaying the files in the file list with details (date modified, size, etc) or in a list. Displaying files with details is the default.

Note: App Studio remembers your choice and will keep the setting you chose the next time the Open File dialog box is open. For example, if you chose to display file details the first time you invoke the Open File dialog box, then the next time you invoke the Open File dialog box, file details are shown.

Refresh Button

When clicked, refreshes the list of available files.

File Information

Displays the name, size, type, and last modified date of the file.

Reference: Save As Dialog Box

The Save As dialog box opens when you click Save As from the Application menu. You can use this dialog box to save a file to another location or to provide a different file name.

Configured Environments list

Contains a list of currently Configured Environments. You can navigate to different environments, development areas, and project folders to display different files in the file list.

File list

Displays all files of a specific type in a selected project folder.

File name drop-down list

Use this text box to type the name of a file you want to open.

Note: If you are in the Repository section and the tree is set to display by title, the Save As dialog box will only require a name to be entered.

File Type drop-down list

Displays the filter based on applicable file type.

Details Toggle

Toggles between displaying the files in the file list with details (date modified, size, etc) or in a list. Displaying files with details is the default.

Note: If you choose to display details or not, App Studio remembers your choice and will keep the setting you chose the next time the Open File dialog box is open. For example, if you chose to display file details the first time you invoke the Open File dialog box, then the next time you invoke the Open File dialog box, file details are shown.

Show All Files in Associated Paths

Displays all files that are associated with the parent folder, when selected. Only one option, *Show all Files in Associated Paths* or *Show Files in Selected Path Only*, can be selected at a time.

Show Files in Selected Path Only

Displays only files in the current, selected folder. This option is selected by default. Only one option, *Show all Files in Associated Paths* or *Show Files in Selected Path Only*, can be selected at a time.

File Information

Displays the name, date last modified, size, and type of the file.

Setting User Preferences Using the Options Dialog Box

You can customize App Studio by setting specific user preferences, using the following tabs in the App Studio Options dialog box. To open the Options dialog box, click *Options* in the Application menu.

Reference: General Tab

The General tab contains options for starting App Studio, minimizing the main window, and other settings. The following options are available.

Main Window Options

Option	Description
Maximize main window	Maximizes the application window when you begin each session.

Smart Context

Option	Description
Set new column type based on metadata/surrounding fields	Sets new column types by using metadata and surrounding fields.
Activate Field ribbon tab when selecting a field on the report canvas	Activates the Field tab on the ribbon upon selection of a field within the report canvas.
Activate Layout ribbon tab when no selection is made on the report canvas	Activates the Layout tab on the ribbon when no selection is made on the report canvas and you click the white space.

Other Settings

Option	Description
Show Welcome Screen	Controls the appearance of the Welcome screen when App Studio is launched.
Confirm close	Displays a prompt for users to confirm that they want to exit App Studio.
Start local WebFOCUS Server	Starts the local Reporting Server when App Studio is launched.
Stop local WebFOCUS Server on exit	Stops and closes the local Reporting Server when you exit App Studio.
Recent file list limit	Allows you to set the number of recently used files that appear in the Recent file lists. The default value is 25.
Ping Interval (minutes)	Sets the frequency at which requests are sent to the web or application server so your connection does not time out. The default is 5.
Reset all message boxes	Resets all message boxes to their default state. For example, if you selected the <i>Don't show this message again</i> check box in any message box, clicking this button will reset all message boxes. Once you click this button, it becomes inactive until you choose not to display a message box in the product.
Reset All Options to Default	Restores all options in App Studio to the default settings.

Option	Description
Default file editor	<p>Lists file editor options, such as:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Edit in App Studio canvas <input type="checkbox"/> Edit in Text Editor <input type="checkbox"/> Edit in Windows registered tool <p>Note: The Edit in Windows registered tool is only visible if the file type you are accessing has been associated with a Windows application.</p> <p>The file editor used determines which shortcut menu options are available and controls the default behavior for double-clicking and right-clicking files.</p>
Language	<p>Provides a drop-down list which allows you to change the language of the App Studio screen text. After you change the language, restart App Studio to make the change effective. The languages listed are selected in the Dynamic Language Switch setting in the WebFOCUS Administration Console.</p>

Reference: Reporting Tab

The Reporting tab contains format options for output, field list displays, formatting a report for the web, and setting the record retrieval limits. The following options are available.

Field List Options

The following options affect the appearance of the Fields tab of the Object Inspector.

Option	Description
Sort the list by field name	Sorts any list of field names alphabetically.
Show fully qualified field names	Displays any list of field names as qualified field names, which include data source and table names, alphabetically.

Option	Description
Display the field name	Displays the full field name in the Fields tab, as specified in the file description.
Display the field alias	Displays the alternate field name in the Fields tab, as specified in the file description.
Display field titles	Displays the titles for columns, filters, and computes in the Fields tab, as specified in the file description.
Display field descriptions	Displays descriptive information about the field in the Fields tab, as specified in the file description.
Display the data formats	Displays the field length and format type in the Fields tab, as specified in the file description.
Expand field tree	<p>Displays fields in expanded mode when using a Field tree. If this option is not selected, segments appear collapsed wherever a Field tree appears.</p> <p>Note: This option can also be accessed from the Field tree shortcut menu.</p>
Display Filters in Filters Folder	<p>Displays Filters in a separate Filters folder of the Field tree. If this option is not selected, Filters appear with the rest of the fields in the segment.</p> <p>Note: This option can also be accessed from the Field tree shortcut menu.</p>

Authoring Mode

The Authoring Mode options determine how field names in a procedure (.fex) are written in the WebFOCUS source code. These options are not affected by the selected Field List options.

Option	Description
Qualified fieldname	Writes the source code using qualified field names, for example: <code>BY 'GGSales.SALES01.CATEGORY'</code>
Unqualified fieldname	Writes the source code using unqualified field names, for example: <code>BY CATEGORY</code>
Alias fieldname	Writes the source code using alias field names, as defined in the ALIAS field of the Master File. The ALIAS field assigns an alternative name for a column. The following example shows source code in which the Category field name is assigned E02 in the ALIAS field of the ggssales.mas Master File. <code>BY E02</code>

Other

Option	Description
Default Report Format	<p>Sets a report format to use as the default format by the Reporting feature.</p> <p>Select the display format for your reports. You can select from the following options:</p> <ul style="list-style-type: none"> <input type="checkbox"/> HTML <input type="checkbox"/> Active Report <input type="checkbox"/> Active Flex <input type="checkbox"/> Active PDF <input type="checkbox"/> PDF <input type="checkbox"/> Excel XLSX <input type="checkbox"/> Excel XLS <input type="checkbox"/> PowerPoint PPTX <input type="checkbox"/> PowerPoint PPT <input type="checkbox"/> Default (This option is the FOCUS default. It applies to whichever of the previous formats was set as an environment parameter.) <input type="checkbox"/> User
Maximum number of records to retrieve	<p>Specifies a limit on the number of records to retrieve from the data source. Setting a retrieval limit creates selection criteria for both Retrieval Limit and Read Limit dialog boxes.</p> <p>Specify a retrieval limit when you need only a few records to test the design of a new report, or you know how many records meet the test criteria and want to stop a search after those records are retrieved. This reduces total retrieval time.</p>
Maximum number of readings to make	<p>Specifies a limit on the number of readings that can be made against the data source.</p>

Option	Description
Default Style Template	Specifies the default styling template when you open the Report feature.
Default Report Template	Specifies the default report settings when you open the Report canvas. Click <i>Browse</i> to select user-created templates.
Retrieve master file descriptions	<p>Displays Master File suffix and description in the Environments Tree, and in the Chart Wizard and the Report Wizard. System performance may be effected if there are a large number of Master Files. The default value is unselected.</p> <p>If you change this option, you must exit App Studio and reopen it for the change to take effect.</p>

Reference: HTML Page Tab

The HTML Page tab enables you to set grid settings for an HTML page, preview reports and charts, set single or multiple layers, and alter the frequency in which you refresh thumbnails. The following options are available.

Grid Settings

Option	Description
Show Grid	Enables you to view a grid while you create an HTML page. The Show Grid check box is selected by default. Clear this check box if you do not want to develop with a grid.
Snap to Grid	Enables you to snap to grid on demand. The Snap to Grid check box is selected by default. Clear this check box if you do not want to enable the snap to grid option.
Width	Customizes the width of your grid. The default is 10 pixels.
Height	Customizes the height of your grid. The default is 10 pixels.

Form type

Option	Description
None	Specifies no form object in the HTML page.
Single layer	Specifies a single layer form in the HTML page. This is the default setting.
Multiple layer	Specifies a multiple layer form in the HTML page.
Form Settings	Opens the Form settings dialog box.

Tab Characters

Option	Description
Insert spaces	Indicates that, when the Tab key is pressed, the number of spaces specified in the Tab size option is inserted.
Keep tabs	Indicates that, when the Tab key is pressed, a tab character is inserted.
Tab size	Specifies the number of spaces inserted when you press Tab.

Check boxes

Option	Description
Show 'New Parameters' dialog	Sets the New Parameters dialog box to appear in the HTML page. This is the default setting.
Default caching option	Sets the Default caching option to run in the HTML page. By default, this option is not selected.
Auto Arrange Objects	Sets the objects in the HTML page to arrange automatically. This is the default setting.

Preview settings

Option	Description
Reports and Charts Preview	Enables you to preview reports and charts before saving and deploying the HTML page. This is the default setting.
Simulated Data	Enables you to view the HTML page based on simulated data from WebFOCUS.
Live Data	Enables you to view reports and charts using live data in the HTML page. This is the default setting.
Record limit for reports	Sets the record limit for reports. Values range from -1 to 999. The default setting is 500.
Record limit for input controls	Sets the record limit for input controls. Values range from -1 to 999. The default setting is 10.
Use Prefix	Sets a prefix to run before each report or chart component on an HTML page.
Refresh thumbnails every seconds	Sets the time interval for refreshing thumbnails. Values range from 0 to 999 seconds. The default setting is 20.
Default Theme	Sets the default theme for an HTML page. The Information Builders theme is the default theme.

Reference: Form Settings Dialog Box

The following table describes the options available in the Form Settings dialog box.

Option	Description
To the left of the input	Sets the prompt orientation to appear to the left of the input controls.
Above the input	Sets the prompt orientation to appear above the input controls. This is the default setting.

Option	Description
Distance between prompt and input	Sets the distance between prompt and input. The range is from 0 to 99 pixels. The default setting is 5 pixels.
Horizontal distance between controls	Sets the horizontal distance between controls. The range is from 0 to 99 pixels. The default setting is 10 pixels.
Vertical distance between controls	Sets the vertical distance between controls. The range is from 0 to 99 pixels. The default setting is 10 pixels.
Number of columns	Sets the number of columns in the form object. The default setting is 4.
Add schedule button	Adds a schedule button to the form object. This is the default setting.
Add defer button	Enables deferred running of a report. This is the default setting.
Start each chain on a new line	Starts chains on a new line. This is the default setting.

Reference: Document Tab

The Document tab enables you to set grid settings for a document, preview reports and charts, and alter the frequency in which you refresh thumbnails. The following options are available.

Grid Settings

Option	Description
Show Grid	Enables you to view a grid while you create a document. The Show Grid check box is selected by default. Clear this check box if you do not want to develop with a grid.
Snap to Grid	Enables you to snap to a grid on demand. The Snap to Grid check box is selected by default. Clear this check box if you do not want to enable the snap to grid option.
Width	Customizes the width of your grid. The default is 10 pixels.

Option	Description
Height	Customizes the height of your grid. The default is 10 pixels.

Tab Characters

Option	Description
Insert spaces	Indicates that, when the Tab key is pressed, the number of spaces specified in the Tab size option is inserted.
Keep tabs	Indicates that, when the Tab key is pressed, a tab character is inserted.
Tab size	Specifies the number of spaces inserted when you press Tab.

Preview Settings

Option	Description
Reports and Charts Preview	Enables you to preview reports and charts before saving and deploying the document. This is the default setting.
Simulated Data	View the document based on simulated data from WebFOCUS.
Live Data	View reports and graphs using live data in the document. This is the default setting.
Record limit for reports	Sets the Record limit for reports. Values range from -1 to 999. The default setting is 500.
Use Prefix	Sets a prefix to run before each report or chart component on a document.
Refresh thumbnails every seconds	Sets the time interval for refreshing thumbnails. Values range from 0 to 999 seconds. The default setting is 20.

Reference: Environments Tab

Note: The Environments options are used to control the development areas that are visible in the Configured Environments tree. At least one option must be selected and applied to all configured environments.

The Environments tab enables you to change the viewable contents of the Configured Environments tree. The following options are available.

Environments settings

Option	Description
Show Projects area	If selected, displays the Projects area in the Configured Environments tree.
Show Data Servers area	Displays the Data Servers area in the Configured Environments tree.
Show Repository area	Displays the Repository area in the Configured Environments tree.
Show Web Applications area	Displays the Web Applications area in the Configured Environments tree.

Reference: Help Configuration Tab

The Help Configuration tab enables you to configure the location of the web-based Help system for App Studio. It provides the fields in which you can modify the App Studio Help configuration information to access the online Help system from your environment.

Option	Description
Protocol	Specify the protocol, either HTTP or HTTPS.
Host	Type the name of the machine where the Help resides.
Port	Type the port number of the web and/or application server.
Help Context Root	Type the context root for the location where the Help is hosted.

Reference: Output Viewer Settings Tab

The Output Viewer Settings tab enables you to set a specific browser to use for output, and to set the navigation options for the output (run in new window, run in same window).

Browser Setup

Option	Description
Browser Setup	<p>Select a browser to use for output.</p> <div> <p>Note:</p> <ul style="list-style-type: none"> ❑ The Browser Setup section is populated with a list of browsers that are installed on the App Studio machine. ❑ App Studio works with Mozilla Firefox®, Google Chrome™, Microsoft Internet Explorer®, and Microsoft Edge® browsers. Microsoft Edge is the default browser for Windows 10 operating systems. Internet Explorer is the default browser for all Windows operating systems prior to Windows 10. ❑ The browser that is highlighted when you close the dialog box is the browser that will be used for execution. </div>
Browser executable path	Sets the location of the browser executable. This field box is populated based on the browser selection.
Web driver location	Sets the location of the web driver for the browser. This field box is populated based on the browser selection.
Test URL	Indicates the test URL for testing the browser setup. The default URL is http://www.ibi.com .
Test browser setup	Tests the browser setup, using the test URL. If the test is successful, the webpage will display in the browser and you will receive a success message. If the test is unsuccessful, you will receive a failed message.
Save selected browser setup	Saves the setup information for the selected browser.

Navigation Options

Option	Description
Run in new window	Sets the output to run in a new window.
Run in same window	Sets the output to run in the same window.

Reference: File Extensions Tab

The File Extensions tab lists the currently supported file extensions. They are all checked by default, and you can clear the check box for any file types that you do not want retrieved from the server.

Note: You must exit and restart App Studio for your selections to take effect.

Option	Description
File Type	The file extension for a specific type of file.
Display	If selected, displays this file type throughout App Studio.

Accessing Frequently Used Commands Using the Quick Access Toolbar

The Quick Access Toolbar provides access to frequently used commands, and the option to customize the toolbar with the commands that you use most often. By default, the Open, Save, Save All, Quick Print, Undo, Redo, Cut, Copy, Paste, Run, and Customizing Quick Access Toolbar buttons appear on the Quick Access Toolbar, as shown in the following image.



Note:

- ❑ When using the undo and redo commands, consider that these actions may not take effect on options or information that is changed in every panel. In addition, if you change multiple options in one panel, for example, the undo or redo command will reverse all of those indicated changes in one action.
- ❑ The Cut, Copy, and Paste commands can be used on text, objects on the HTML canvas and Document canvas, and fields on the Report canvas.

The Customize Quick Access Toolbar button (down pointing arrow) appears on the Quick Access Toolbar and opens the Customize Quick Access Toolbar menu. This menu contains a list of the default commands on the toolbar. You can clear these commands to hide them from the toolbar. There are also options to add more commands with the Customize dialog box, move the Quick Access Toolbar below the ribbon, and hide the ribbon.

You can also add commands using the Customize dialog box. To access the Customize dialog box, select *More Commands* from the Customize Quick Access Toolbar menu. From the Customize dialog box, you can choose which commands you want to add to or remove from the Quick Access Toolbar, as well as the order in which the commands appear.

The Quick Access Toolbar is always available. By default, it is located in the upper-left corner of the App Studio interface. To move the Quick Access Toolbar below the ribbon, click the arrow button, and then click *Show Below the Ribbon*.

Reference: Customize Dialog Box

Using the Customize dialog box, you can add or remove commands from the Quick Access Toolbar. By providing access to the Customize Keyboard dialog box, you can also customize the keyboard by setting keyboard shortcuts for commonly performed tasks.

Choose commands from

Opens a list of available areas in App Studio. The Commands section dynamically repopulates with the commands that are associated with your selection.

Commands

A list of commands from a specific area of App Studio. You can select commands and use the Add or Remove buttons to add or remove them from the Quick Access Toolbar. Commands are represented by the icon that displays on the ribbon. Commands that have no icon and a vertical arrow are command groups. Commands that have an icon and a horizontal arrow are commands with submenus. You can add all commands, command groups, and commands with submenus to the Quick Access Toolbar.

Add

Adds a selected command from the Commands list to the Quick Access Toolbar.

Remove

Removes a selected command from the Quick Access Toolbar. If no command is selected, the last command on the Quick Access Toolbar is removed.

Up

Moves a command up in order on the Quick Access Toolbar.

Down

Moves a command down in order on the Quick Access Toolbar.

Reset

Reverts the Quick Access Toolbar to use the default commands (Open, Save, Quick Print, and Run).

Show Quick Access Toolbar below the Ribbon

Displays the Quick Access Toolbar below the ribbon when selected.

Customize

Opens the Customize Keyboard dialog box. For more information on the Customize Keyboard dialog box, see [Customize Keyboard Dialog Box](#) on page 72.

OK

Applies the changes you made to the Quick Access Toolbar.

Cancel

Exits the Customize dialog box without applying any changes you made to the Quick Access Toolbar.

Help

Opens the App Studio Help.

Procedure: How to Add Commands to the Quick Access Toolbar

You can quickly add commands to the Quick Access Toolbar by right-clicking the ribbon, groups, or the individual commands, and selecting *Add to Quick Access Toolbar*, or you can follow the procedure below.

1. On the Quick Access Toolbar, click the arrow, and then click *More Commands*.

The Customize dialog box opens.

2. In the Choose commands from list, select a command group.
3. Select a command name, and then click *Add*.

The command name appears in the Quick Access Toolbar list.

If you select a command group or a command with a submenu, all associated commands are accessible from the Quick Access Toolbar.

To remove a command name from the Quick Access Toolbar list, select the command, and then click *Remove*.

4. Click the arrow buttons to rearrange the order of command names in the list.

This also rearranges how the command buttons appear in the Quick Access Toolbar.

5. Click *OK* to save your changes.

Reference: Customize Keyboard Dialog Box

The Customize Keyboard dialog box is used to create and edit keyboard shortcuts to commands. You can access the Customize Keyboard dialog box by clicking the Customize button in the Customize dialog box from the Quick Access Toolbar.

Categories

A list of the available areas in App Studio. The commands associated with that area are displayed in the Commands section.

Commands

A list of commands from a specific area of App Studio. You can select commands and then assign a keyboard shortcut to them.

Current Keys

Displays the current keyboard shortcuts associated with the selected command.

Press new shortcut key

Press the keyboard shortcut you want to assign to a specific command. Once the Assign button is clicked, this keyboard shortcut will then be displayed in the Current Keys list for the selected command.

Set Accelerator for

Enables you to set an accelerator for one of the following: Default, HtmlPage, or Document.

Description

Provides a description of the selected command.

Assign

Allows you to assign a keyboard mapping to a command.

Remove

Allows you to remove an assigned keyboard mapping.

Reset All

Resets all keyboard mapping assignments for every command. A warning displays to ensure that want to perform this action.

Close

Exits the Customize Keyboard dialog box and return to the Customize dialog box.

Procedure: How to Create Keyboard Shortcuts

1. To open the Customize dialog box, do one of the following:
 - ☐ Click the drop-down arrow on the Quick Access Toolbar and then click *More Commands*.
 - ☐ Use the shortcut menu on the ribbon or Quick Access Toolbar and then click *Customize Quick Access Toolbar*.
2. Click *Customize*.
The Customize Keyboard dialog box opens.
3. From the Categories list, select an area that contains the command that you want to create a shortcut for.
4. From the Commands list, select a command.
5. In the Press new shortcut key area, enter the key combination that you want to use with the command you selected.

You can make a shortcut up to three keystrokes long. For example, Ctrl+Shift+R.

6. Click *Assign*.

A shortcut is now assigned with the command you selected.

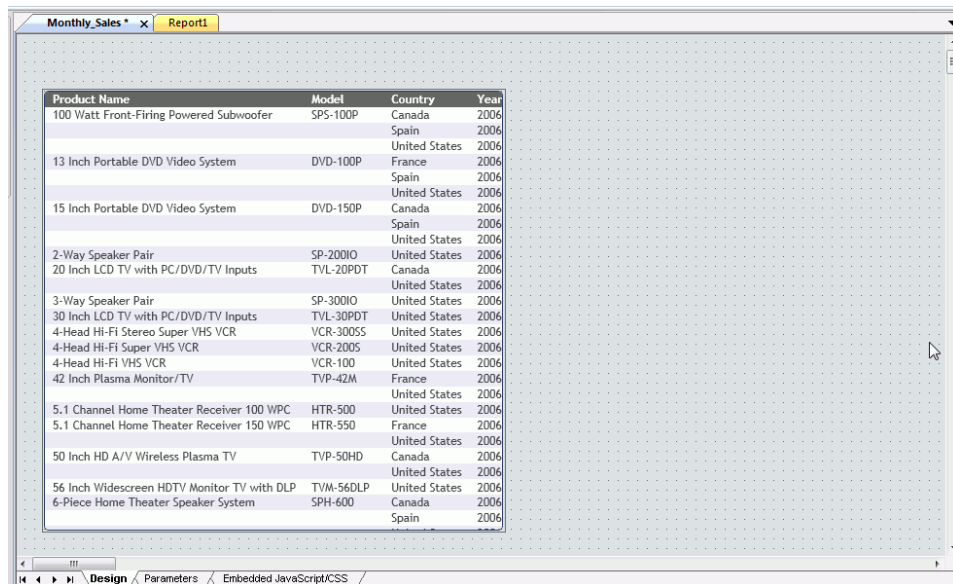
7. Click *Close* to exit the Customize Keyboard dialog box.

Developing Applications in the Canvas Area

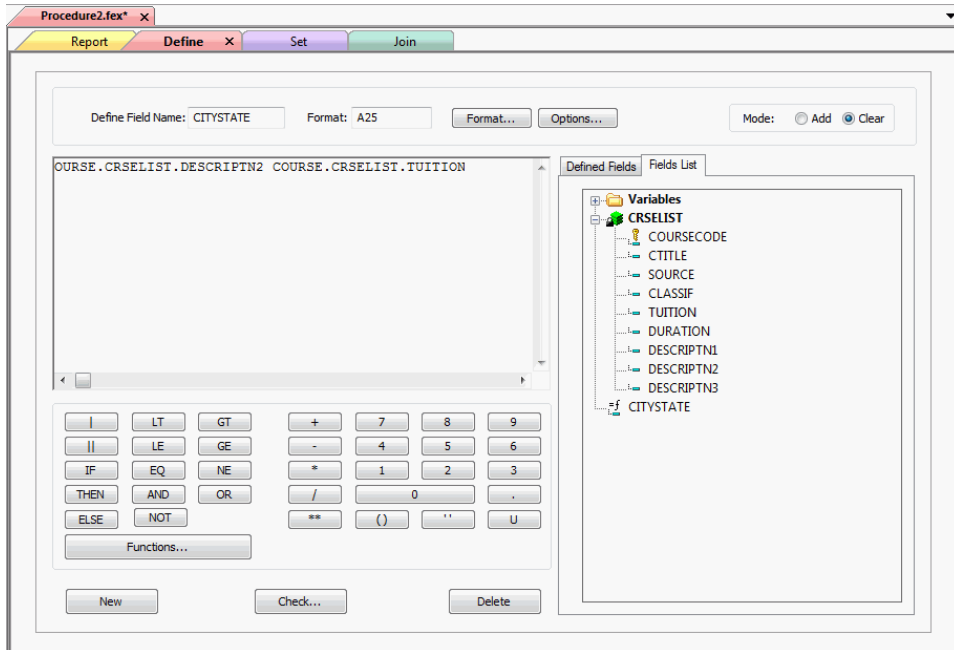
You can use App Studio features and functions to develop applications in the canvas area of the interface. The size of your canvas depends on the placement and location of panels around the interface window.

As you develop in App Studio, tabs open in the canvas area. Since you can develop an HTML page at the same time that you create a report, each canvas opens with a different colored tab. The colored tab at the top of each canvas displays the name of the file you are developing.

If you chose to name the file after you develop the content, a default file name, such as Report1, appears on the tab, as shown in the following image.

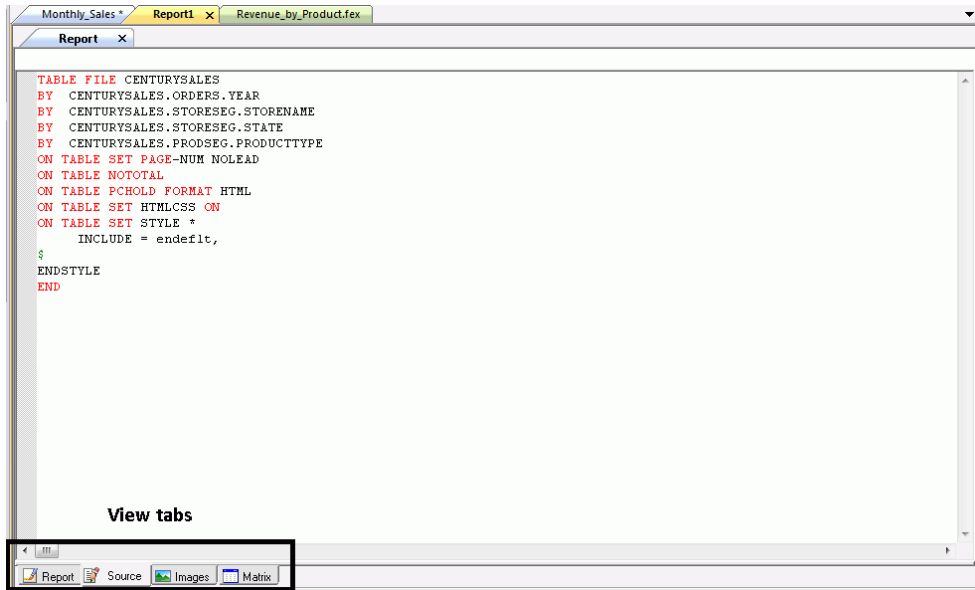


A second set of tabs opens when you create procedures with multiple components. For example, you can add Set, Define, and Join components to a procedure at anytime. These canvases open as tabs below the report or chart procedure, as shown in the following image.



In addition to colored tabs, some canvases also contain View tabs. A View tab appears at the bottom of the canvas and changes the display of information on the canvas. View tabs are shown in the following image.

View tabs display different views of the same component.




View tabs, such as those on the HTML canvas, also enable additional features and functions that you can use to customize an application. For example, in the HTML canvas, you can add JavaScript functionality to an HTML page through the Embedded JavaScript view tab.

You can develop App Studio content in the following canvases.

Creating and Scheduling an Alert Using the Alert Assist Canvas

The Alert Assist canvas enables you to distribute an entire report or selected sections of a report when certain test conditions are met.

To access the online Help for the Alert Assist canvas, click the *Alert Assist Help* icon , located within the Alert Assist canvas.

Alert Assist Button

The Alert Assist button opens a menu that contains the Save, Save As, Run, and Close buttons.

Alert Assist Quick Access Toolbar

You can access frequently used commands on the Alert Assist Quick Access Toolbar, such as Save, Undo, Redo, View code, and Run.

Alert Assist Home Tab

You can use the Alert Assist Home tab to access the features and functions necessary to create, open, edit or run an Alert Test or Alert Result. The Alert Assist Home tab contains the Navigation group.

Navigation Group

You can create a new Alert Test or Alert Result, open a previously created Alert Test or Alert Result, edit a previously created Alert Test or Alert Result, and run the report in a new browser window. The commands are:

New

You can create a new Alert Test or Alert Result by selecting Test or Result, and then clicking *New*. This opens a menu from which you can choose to create a new WebFOCUS Report or Test for File Existence. New provides the same functionality as if you right clicked the Test node and created a report from the menu.

Open

You can open a previously created Alert Test or Alert Result. This invokes the Chart canvas so that you can make changes to the chart. The Open option is activated only after a report test is created.

Edit

You can edit an Alert Test or Alert Result. This opens the Report on FILENAME data source dialog box. Here, you can edit the report in the Text Editor canvas.

Run

You can run the report in a new browser window.

Delete Group

You can remove the report from the Alert Test or Alert Result. The command is:

Delete

You can remove the report from the Alert Test or Alert Result.

Creating Charts Using the Chart Canvas

The Chart canvas enables you to create different types of charts. You can select from a variety of chart types and output formats, and add custom features to a chart. To access the Chart canvas, on the *Home* tab, in the *Content* group, click *Chart*. The Chart Wizard opens.

Creating Cascading Style Sheets Using the Cascading Style Sheet Canvas

The Cascading Style Sheet canvas allows you to create a cascading style sheet. To access the Cascading Style Sheet canvas, right-click any folder or file in the Environments Tree panel and in the shortcut menu click *New* and then *Cascading Style Sheet* .

Accessing the ESRI Configuration Utility Canvas

The ESRI Configuration Utility canvas allows you to edit configuration options associated with ESRI, the ArcGIS Server, and the GIS Adapter. To access the ESRI Configuration Utility canvas, right-click an Application folder in the Data Servers area, point to *New*, and click *XML Document with ESRI Configuration*.

Working With the JavaScript/CSS Canvas

The JavaScript canvas and the Embedded JavaScript/CSS view tab have a built-in Auto Complete feature to assist in the creation of code segments, similar to functionality offered by Microsoft IntelliSense® and other code editors. When you begin typing a string, array, number, or user-defined object, a list of available JavaScript methods, related to those code segments, displays.

The Auto Complete feature is on by default. To turn it off, right-click in the Cascading Style Sheet canvas and clear *Auto Complete* from the shortcut menu.

Note: If there is a syntax error, the Auto Complete features will not display.

Editing Component Code Using the Text Editor Canvas

The Text Editor canvas allows you to edit component code. To access the Text Editor canvas, right-click a component in the Procedure View panel, point to *Open With*, and then click *Text Editor*.

Combining Layouts Within a Single Document Using the Document Canvas

The Document canvas enables you to design reports, and to coordinate and distribute layouts made up of multiple reports and charts in a document. You can position reports and charts anywhere on a single page or combine a series of layouts within a single document. To access the Document canvas, on the *Home* tab, in the *Content* group, click *HTML/Document*. When the HTML/Document Wizard opens, select *Document* from the available options. The Document canvas opens.

Creating HTML Pages Using the HTML Canvas

The HTML canvas enables you to create HTML pages for WebFOCUS. Designed for business users, you do not need to have experience in HTML, CSS, XML, or JavaScript. The HTML canvas is a graphical interface that is easy to use.

Note: HTML canvas files are intended to be created and edited with the HTML canvas only. They are not designed to be edited manually. HTML files that have been edited manually, outside the HTML canvas, may fail to run and are not supported.

If you are a web developer and want to write your own code instead of using the HTML canvas, you can use the authoring tool of your choice and also use RESTful Web Services. To do so, you must license the WebFOCUS Web Services Enablement Option. For more information see the *WebFOCUS RESTful Web Services Developer's Guide*.

To access the HTML canvas, on the *Home* tab, in the *Content* group, click *HTML/Document*. When the HTML/Document Wizard opens, select *HTML Page* from the available options. The HTML canvas opens.

The HTML canvas uses HTML 5 Document Type Definitions (DTD).

Creating and Styling Reports Using the Report Canvas

The Report canvas provides you with many features that enable you to create and style reports. To access the Report canvas, on the *Home* tab, in the *Content* group, click *Report*. The Report Wizard opens. Follow the prompts in the Report Wizard to create a report. The Report canvas opens.

Creating Reporting Objects Using the Reporting Object Canvas

The Reporting Object canvas enables you to present available data using different terms and formats. You can then use Reporting Objects as templates for the creation of a wide range of reports and charts.

To access the online Help for the Reporting Object canvas, click the *Reporting Object Help* icon



, located within the Reporting Object canvas.

Reporting Object Button

The Reporting Object button opens a menu that contains the Save, Save As, Run, and Close buttons.

Reporting Object Quick Access Toolbar

You can access frequently used commands on the Reporting Object Quick Access Toolbar, such as Save, Undo, Redo, View code, and Run.

Reporting Object Home Tab

You can use the Reporting Object Home tab to access the features and functions necessary to create, open, edit or run an item. The Reporting Object Home tab contains the Navigation group.

Navigation Group

You can create a new item, open a previously created item in the respective canvas, edit a previously created item, rename an item, and run the item. The commands are:

New

You can create a new join, DEFINE statement, filter, or WHERE statement.

Open

You can open a previously created items in the appropriate canvas.

Edit

You can open the item source code in the Text Editor canvas.

Properties

You can rename the selected filter or filter group.

Run

You can run the selected item.

Delete Group

You can delete a selected item or all items of a specific type. The commands are:

Delete

You can delete the selected item.

Delete All

You can delete all items of the selected item type. For example, all WHERE statements, all filters in a particular group, or all filters in every group.

Working With Synonyms Using the Metadata Canvas

The Metadata canvas provides a graphical interface that enables you to work with synonyms and perform tasks, such as creating, viewing, and modifying synonyms. To access the Metadata canvas from the Environments Tree panel, right-click a Master File and select *Metadata Canvas*. To access the Metadata canvas from the ribbon, on the *Home* tab, in the *Content* group, click *Data*, and then click *Synonym via Metadata Canvas*.

Joining Data Sources Using the Join Canvas

The Join canvas allows you to temporarily join two or more data sources and use data from them as if they were one data source. Joined files remain physically separate but are treated as one data source. To access the Join canvas, right-click a procedure folder or component in the Procedure View panel, point to *New*, and then click *Join*.

Creating Hierarchies and Dimensions Using the OLAP Dimensions Canvas

The OLAP Dimensions canvas allows you to create temporary OLAP hierarchy and dimensions. To access the OLAP Dimensions canvas, right-click a procedure folder or component in the Procedure View panel, point to *New*, and then click *Olap Dimensions*.

Changing Environment Settings Using the Set Canvas

The Set canvas provides you with a graphical option for issuing a SET command. You can use the SET command to change parameters that govern App Studio and your environment. To access the Set canvas, right-click a procedure folder or component in the Procedure View panel, point to *New*, and then click *Set*.

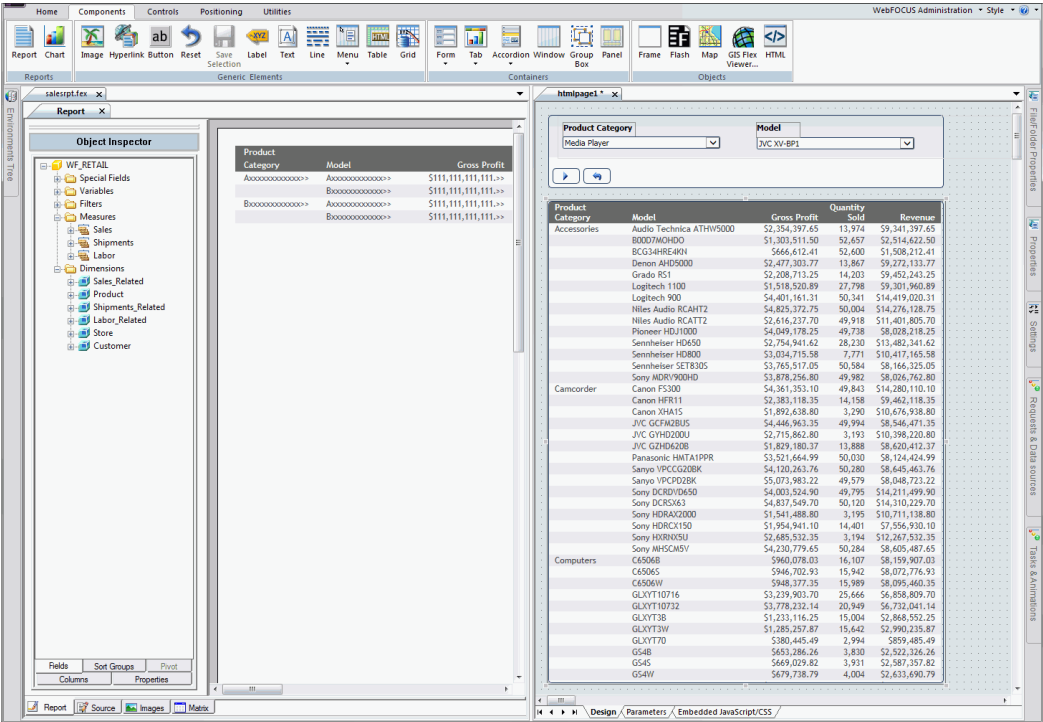
Specifying the Name and Location of a Data Source Using the Use Canvas

The Use canvas enables you to specify the name and location of a WebFOCUS data source. This is helpful if the default naming convention is not used, the data source cannot be found on the standard search path, or an explicit extra option is desired. To access the Use canvas, right-click a procedure folder or component in the Procedure View panel, point to *New*, and then click *Use*.

Customizing Canvases

You can switch between the canvases by clicking the colored tab at the top of the canvas. You can also develop in the canvases side by side.


The following image shows an HTML canvas next to a Report canvas.



Procedure: How to Move Canvases for Side-by-Side Development

To create side-by-side canvas development, follow these steps:

- 1. Drag one canvas tab away from its original position.

A pointer with a document icon  appears.

- 2. Drag the pointer with the document icon to the upper-right corner of the canvas.

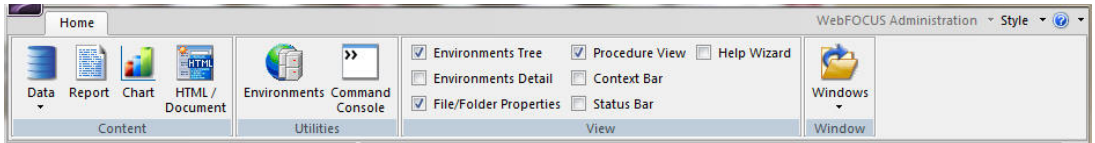
The canvases now appear side by side.

Tip: Repeat the preceding steps to develop on additional canvases side by side.

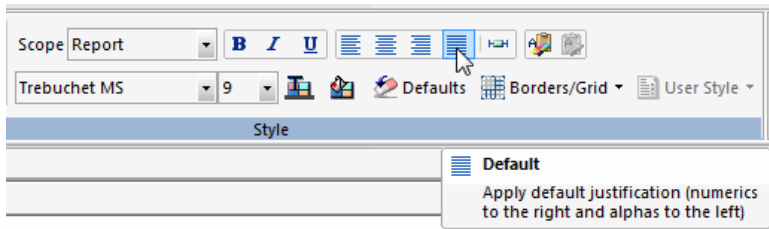
Accessing Features and Functions With the App Studio Ribbon

The App Studio ribbon replaces traditional toolbars with a single command bar that organizes commands and controls into a series of static and contextual tabs. From the ribbon, you can also access the WebFOCUS Administration menu, the Style menu, and the Help menu.

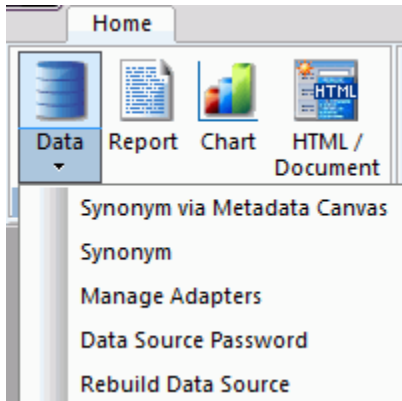
The default ribbon is shown in the following image.



Each tab on the ribbon, whether static or contextual, contains commands and controls that are organized into groups according to their function or relationship. All tabs are named and all groups are labeled. Icons are used to represent the commands or controls in each group. By default, all icons are labeled. There are a few styling icons in the Style group that are not labeled. Rest your pointer over an icon to view the tooltip that identifies it. An example of this is shown in the following image.



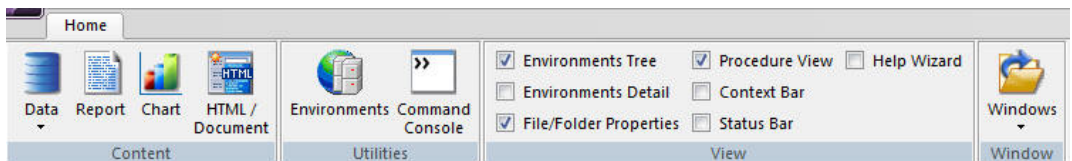
In addition to single-click commands, some commands on the ribbon contain a submenu of options that opens when you click the arrow associated with the command. These arrows can appear below or next to a label. An example of this is the Data command, which opens a submenu of options, as shown in the following image.



Note: There is no default ribbon size. As your monitor or application window size changes, the commands and controls on the ribbon resize themselves to fit the available space. Large monitors or application windows will display larger icons and entire groups. Smaller monitors or application windows may display groups as a single, labeled icon that opens a submenu.

Building an Application Using the Home Tab

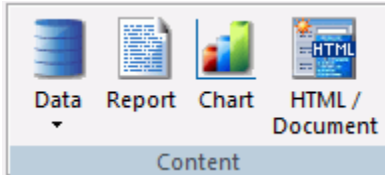
The Home tab enables you to access the features and functions necessary to build an application, create new components, open existing components, run existing components, and edit components. The Home tab contains the Content, Utilities, View, and Window groups. The Home tab is always available and is static. It is located in the upper-left corner of the App Studio interface, below the Quick Access Toolbar, as shown in the following image.



Note: The Home tab is the only static tab in App Studio.

Creating an Application Using the Content Group

The Content group contains the components or tools that you can use to create an application. These include: Data, Report, Chart, and HTML/Document. The Content group is shown in the following image.



The commands in the Content group are:

Data

Contains the *Synonym via Metadata Canvas*, *Synonym*, *Manage Adapters*, *Data Source Password*, and *Rebuild Data Source* commands. These provide you the options you need to create and edit synonyms for existing adapters, configure a new adapter, or add a remote server.

If you click *Synonym via Metadata Canvas*, the Data Source Definition Wizard opens. Navigate to the location of the data source you want to create or edit and click *OK*.

If you click *Synonym*, the Select Server Node dialog box opens. Navigate to the application folder where you want to create your synonym and click *OK*. After the location of the synonym is determined, the Select Adapter dialog box opens. Select the adapter you want to use and click *OK*. You will then be able to edit the synonym details.

If you click *Manage Adapters*, the Select Server Node dialog box opens. Navigate to a valid server location to begin configuring a new adapter or edit the settings of an existing adapter.

If you click *Data Source Password*, the Password Dialog box opens. You can enter the password for the data source you have selected in your Environments Tree panel.

If you click *Rebuild Data Source*, the Rebuild dialog box opens. You can rebuild a disorganized file, index a specific field from a file, or check the integrity of a file.

Note: To index a specific field from a file, the field must have FIELDTYPE=I, specified in the Master File. You can do this from the Metadata canvas using the FIELDTYPE property, I-Index check box.

Report

Opens the Report canvas in report mode after you enter a procedure name and select a location for your report from the Report Wizard.

In report mode, you can create and style simple or complex reports, add data to the Report canvas, and style that data creating a graphical representation of the report page. This allows you to view how the report displays at run time.

Using report mode, you can:

- ☐ Display and sort data.
- ☐ Select records.
- ☐ Include totals, subtotals, column calculations, headings, footings, and images.
- ☐ Format columns.
- ☐ Style fonts, colors, and grids.
- ☐ Add drill downs to detailed reports and URLs.
- ☐ Save output in many types of formats for display and reuse.
- ☐ Create active reports.
- ☐ Perform predictive analysis (an RStat license is required).

Chart

Opens the Chart canvas after you enter a procedure name and select a location for your chart from the Chart Wizard.

In chart mode, you can easily transform almost any type of data into effective custom charts. You can create a variety of charts, such as bar charts, line charts, scatter charts, or pie charts, to help users analyze data in a different way. You can include selection criteria by defining parameters for your data. Additionally, you can apply drill-down capabilities and conditional styling to highlight specific data on a chart.

The Chart canvas contains a ribbon of features and options that allow you to add and style the data in your chart. Contextual tabs open within the Chart canvas, rather than on the App Studio ribbon.

HTML/Document

Opens the HTML/Document Wizard. You can choose the type of page that you want to create from the following options: HTML Page, Guided Report Page, Document, or Active Dashboard. Depending on your selection, the corresponding canvas will open.

HTML mode provides the features you need to create HTML pages so that end users can interact with your data. You can build and customize an HTML page in the HTML canvas, using the contextual tabs on the ribbon to add objects to the page. HTML mode is fully integrated with JavaScript and cascading style sheets (CSS).

In the HTML canvas, you can:

- ☐ Build an HTML launch page.
- ☐ Add push buttons, hyperlinks, and other controls to launch WebFOCUS reports in your application.
- ☐ Create a launch page for one or more reports that contain parameters.
- ☐ Create a complete HTML page, by adding multiple reports and charts.
- ☐ Create an advanced report layout by including images, frames, and other web objects.
- ☐ Modify the location, size, and properties of all objects in your page layout.
- ☐ Set background, font, and other page properties.

In the Document canvas, you can coordinate and distribute layouts made up of multiple reports and charts in a single document. You can position reports and charts anywhere on a single page or combine a series of layouts within a single document. When creating compound reports in the Document canvas, PDF, HTML, active reports, PowerPoint, and Excel are available as output formats.

Creating a New Environment and Accessing the Command Console Using the Utilities Group

The Utilities group enables you to create a new environment and to access the Command Console, where you can send commands to the server. The Utilities group is shown in the following image.



The command in the Utilities group is:

Environments

Opens the Environments List dialog box. A WebFOCUS environment consists of a web server, a WebFOCUS Client, and a Reporting Server. Adding WebFOCUS environments allows you to create and manage multiple environments, such as development, test, and production instances. You can set a new development environment, add a new environment, edit an existing environment, or remove an environment.

Command Console

Opens a command tab for editing and enables you to send commands directly to a server from App Studio. For more information on creating, viewing, and editing source syntax, see [Creating, Viewing, and Editing Source Syntax in WebFOCUS App Studio](#) on page 753.

Sending Commands to the Server Using the Command Console

The Command Console enables you to send commands directly to a server from App Studio. This benefits users who have worked with Information Builders products and are already familiar with the command syntax.

The Command Console sends output to your web browser or App Studio Viewer. Output can include error messages, responses to query commands, and report output. The Command Console can also serve as a troubleshooting and debugging tool.

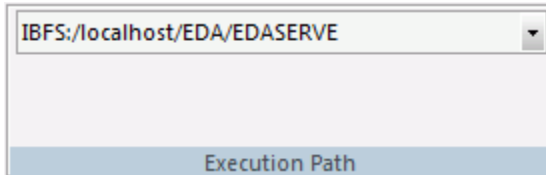
The following are a set of rules that you should follow when entering commands in the command console.

- ❑ The Console is case-sensitive. Therefore, you must enter text in the case required for processing. For example, keywords must be entered in uppercase characters.
- ❑ The Command Console is not interactive. Therefore, you must enter all required commands in sequence and execute them as an entire process. For example, you must enter all steps required to execute the WebFOCUS REBUILD command. The Console does not prompt you for information.
- ❑ You can copy or cut text from the Command Console or an outside window, and paste it in the Command Console.
- ❑ You can drag command syntax within the Command Console.

The following groups are available in the Command Console Ribbon tab.

Listing the Available Paths Using the Execution Path Group

The Execution Path group contains a list of paths that are available for you to use when you execute commands. The Execution Path group is shown in the following image.



The command is:

Execution Path List

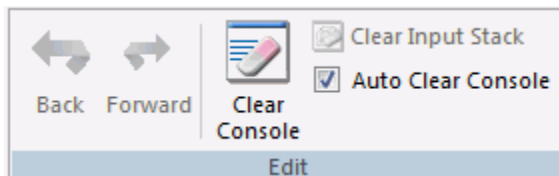
Contains a list of available paths for you to execute commands.

The list of available execution paths is determined by the selected nodes in the Environments Tree Panel. When you open App Studio for the first time, you must expand and select a node from the Environments Tree panel to populate the Execution Path List.

When you run the content of the console, it will be executed using the selected execution path and the Reporting Server associated with that selected path.

Loading Commands Using the Edit Group

The Edit group allows you to load commands, clear the console, and clear the input stack. The input stack is a series of commands that you enter using the Command console. The Edit group is shown in the following image.



The commands are:

Back

Loads the previous command from the input stack.

Forward

Loads the next command from the input stack.

Clear Console

Clears the current commands from the console.

Clear Input Stack

Clears the previously entered commands from saved memory. This option is unavailable if you do not have previously entered commands available for recall.

Auto Clear Console

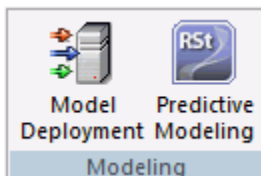
When selected, automatically clears the console after your commands are executed.

Note: The Command Console tab shares the following groups with the Text Editor tab: Find, Bookmarks, Position, Case/Comment, and Options. For more information on these remaining groups, see [Creating, Viewing, and Editing Source Syntax in WebFOCUS App Studio](#) on page 753.

Deploying an RStat Scoring Routine Using the Modeling Group

The Modeling Group is only available when RStat is installed. You can deploy an RStat scoring routine or estimate future values based on selected data.

WebFOCUS RStat is a statistical modeling workbench embedded in App Studio. It allows you to perform common statistical and data mining tasks, and develop models that can be deployed as scoring applications on every platform. RStat enables data miners and Business Intelligence developers to collaborate with the same tools used to access, manipulate, or transform data, develop predictive models, and create and deploy scoring applications along with associated reports to any worker within their organization. The Modeling group is shown in the following image.



The commands in the Modeling Group are:

Model Deployment

Opens the Model Deployment dialog box. This functionality enables you to deploy existing, stored routines.

You can deploy an RStat scoring routine in any application directory within your app path on any WebFOCUS server. The process of deployment includes compiling the routine and placing the executable file in a location that can be accessed by a WebFOCUS scoring application.

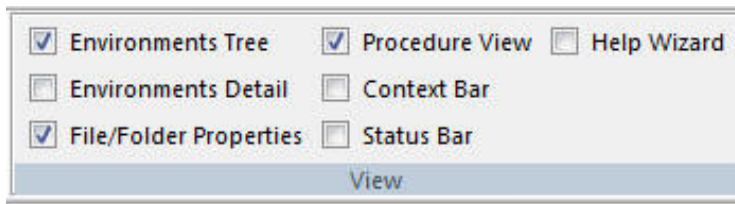
Predictive Modeling

Opens RStat, a statistical modeling workbench that is embedded in App Studio. When you select the Predictive Modeling command, the RGui window is opened and the R Console and RStat are activated.

You use RStat to derive expected and predicted values from data observations. Decision trees, regression, and the other algorithms are used to generate estimates. For example, you can estimate whether a prospect is a good target for a particular marketing campaign, or you can estimate the expected sales revenues for different stores in order to determine whether store layout and product mix have an impact on sales.

Controlling the Display of the Screen Using the View Group

The View Group enables you to control what displays on your screen. For example, you can choose whether to display or hide the Environments Tree or Help Wizard. The View group is shown in the following image.



The commands in the View group are:

Environments Tree

Displays or hides the Environments Tree panel, which displays on the left side of the screen and displays environment information.

Environments Detail

Displays or hides the Environments Detail panel.

File/Folder Properties

Displays or hides the File/Folder Properties panel.

Procedure View

Displays or hides the Procedure View panel.

Context Bar

Displays or hides the Context Bar. The Context Bar displays under the ribbon.

Status Bar

Displays or hides the Status Bar. The Status Bar displays along the bottom of the screen.

Help Wizard

Displays or hides the Help Wizard. By default, the Help Wizard panel opens in the bottom-right corner of the interface. The Help Wizard content dynamically changes, depending on where you are in the interface.

Viewing and Manipulating Windows Using the Window Group

You can view and manipulate all opened windows. The Window group is shown in the following image.



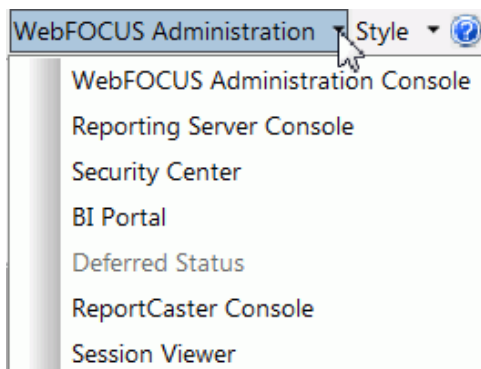
The command in the Window group is:

Windows

Manipulates all opened windows. You can view and manipulate the windows using the Windows dialog box. The Windows dialog box enables you to Activate or Save an open window.

Using the WebFOCUS Administration Menu

From the WebFOCUS Administration menu, you can access the WebFOCUS Administration Console, the Reporting Server Console, the Security Center, the BI Portal, the ReportCaster Console, and the Session Viewer. You can also create deferred status reports from this menu. The WebFOCUS Administration menu is shown in the following image.



The WebFOCUS Administration menu is only available when you select an environment in the Environments Tree panel. The options available to you change, depending on the development area that you select in the Environments Tree panel. Deferred Status is only available when you select a Content node in the Environments Tree panel. The Reporting Server Console is only available when you select a Web Applications node in the Environments Tree panel.

WebFOCUS Administration Console

Opens the WebFOCUS Administration Console in the set browser. Here you can add remote Reporting Servers, configure application settings and client settings, and use WebFOCUS diagnostic tools.

Reporting Server Console

Opens the Web Console, where a server user with the required metadata privileges can configure and manage adapters, and can create synonyms through the Reporting Server Console. You can use the Server Console as an alternative to App Studio to configure adapters, add remote servers, and create synonyms. In addition, many other configuration options are available through the Server Console.

For a full understanding of configuration options and server capabilities, see the Server Console Help system or the following manuals: *Server Administration for UNIX, Windows, OpenVMS, IBM i, and z/OS* and *Adapter Administration for UNIX, Windows, OpenVMS, IBM i, and z/OS*.

Note:

- ❑ The Reporting Server Console is sometimes referred to as the Web Console.
- ❑ For App Studio installations that allow stand-alone development, the local, default Reporting Server normally runs with security OFF, and the user who installed App Studio is the default administrator.

Security Center

Opens the WebFOCUS Security canvas. Here you can set user privileges and roles for users and groups.

BI Portal

Opens the WebFOCUS BI Portal in the set browser. Here you can create dynamic websites using the content you create in App Studio.

Deferred Status

Opens the Deferred Report Status console in the set browser. Here you can defer running a report until a specified time. This option is only available in the Content node.

ReportCaster Console

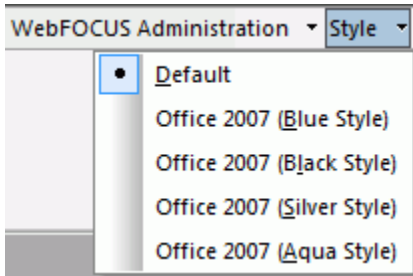
Opens the ReportCaster Console in the set browser. Here you can schedule and distribute WebFOCUS reports, the content of URLs, and files.

Session Viewer

Enables you to review system events that took place during recent work sessions and export them to system administrators or customer support staff. Traces of system events and error messages captured by the Session Viewer provide a clear picture of system operations, and enable you to investigate the causes of system disruptions or performance issues.

Customizing the Appearance of the Interface Using the Style Menu

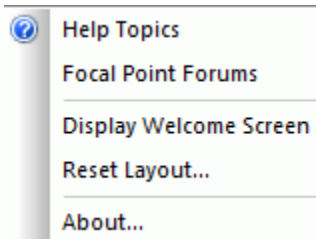
You can customize the appearance of the App Studio interface from the Style menu. From this menu, you can select a theme with which to customize the App Studio interface. The themes available to you are determined by the themes that you have installed for Microsoft® Office. The Style menu is always available. It is located in the upper-right corner of the App Studio interface, as shown in the following image.



Note: When you close App Studio, the theme that you have selected is saved and used the next time you launch the product.

Accessing App Studio Help Content

You can access the App Studio Help content, Focal Point Forums, App Studio licensing information, and other product options from the Help menu. The Help button is always available. It is located in the upper-right corner of the App Studio interface, as shown in the following image.



From the Help menu, you can do the following:

- ❑ Access the online Help system. Click *Help Topics* to open the App Studio Help window.
- ❑ Access the Focal Point community. Click *Focal Point Forums* to access our online developer center and more than a message board. It is an interactive network of developers from almost every profession and industry, collaborating on solutions and sharing tips and techniques.

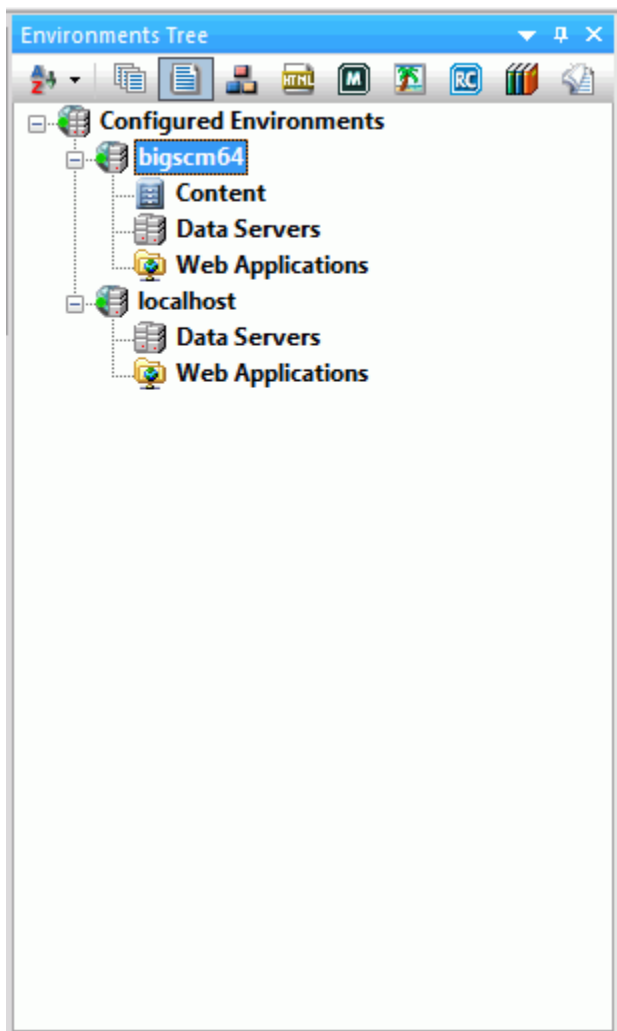
- ❑ Reopen the Welcome screen after it has been closed. Click *Display Welcome Screen* to reopen the Welcome screen.
- ❑ Reset the interface layout. Click *Reset Layout* to return the App Studio interface settings, such as the ribbon, Quick Access Toolbar, panels, and styling, to their default. This change will not occur until App Studio is restarted.
- ❑ View license and product information. Click *About* to open the About WebFOCUS App Studio dialog box.

Working With the Environments Tree Panel

From the Environments Tree panel, you can:

- ❑ Customize the appearance of the panel.
- ❑ Filter content listed under the WebFOCUS environments in the Configured Environments tree.
- ❑ Access configured WebFOCUS environments to create new content or modify existing content.
- ❑ Refresh an application or folder in the Configured Environments tree, to view new files and updated file information, and omit deleted files.

The Environments Tree panel is shown in the following image.













The Environments Tree panel opens with App Studio.








Reference: Environments Tree Toolbar

The Environments Tree toolbar contains the buttons and menus that you need to navigate, filter, and sort the information that appears in the Configured Environments tree.

View Options

Presents options for viewing items (for example, alphabetical sorting or grouping), as described in the following table.

Option	Name	Function
	View items sorted in Alphabetical order	Sorts the files alphabetically from A to Z.
	View items sorted in reverse Alphabetical order	Sorts the files alphabetically from Z to A.
	View items sorted in Chronological order	Sorts the files by the last saved time, in descending order.
	View items sorted in reverse Chronological order	Sorts the files by the saved time, in ascending order.
	View Items grouped by File Type	Sorts the files by file type.
	Respect Sort Order Property	Respects the Sort Order property value specified in the File/Folder Properties panel. This is the default.
	View items by Title	Displays the files by title and sorts the files by title. If an item does not have a title, its name is shown.
	View items by Name	Displays the files by name and sorts the files by name. If an item does not have a title, its name is shown.
	Refresh View	Refreshes all of the files and folders that you see in the Configured Environments tree. <i>Refresh View</i> also shows the dependencies of the file or folder that you have selected.
	Show All Content files	Filters the tree to show all content file types.
	Show only Procedure files	Filters the tree to show only this file type.

Option	Name	Function
	Show only Master files	Filters the tree to show only this file type.
	Show only HTML files	Filters the tree to show only this file type.
	Show only Maintain files	Filters the tree to show only this file type.
	Show only Image files	Filters the tree to show only this file type.
	Show only ReportCaster files	Filters the tree to show only this file type.
	Show only Library files	Filters the tree to show only this file type.
	Other files	Filters the tree to show other file types.

Viewing Nodes in the Configured Environments Tree

The Configured Environments tree displays the WebFOCUS Environments, Data Servers, Domains, and Web Applications nodes. These are the development areas where you can create content. If you have the Managed Reporting version of App Studio and WebFOCUS installed on your machine, or configured a remote WebFOCUS 8 environment, a repository node also appears.

If a node under the Configured Environments Tree has been populated and contains content, a green dot is shown on the node icon. If a node has been populated and does not contain any content, a red dot is shown on the node icon. If a node has not been populated, App Studio does not know if there is any content in that node and no dot is shown on the node icon. If you create a new content in a node with a red dot on it, that node now has content in it and will change to a green dot. If you delete all content in a node with a green dot, that node now has no content in it and will change to a red dot.

Note: By default, the Configured Environments tree sorts files and folders by title. If you change the sorting options to *View Items by Name*, the names of your files and folders will display. Whether you display content by title or by name, the Content, Data Servers, Projects (optional), and Web Applications nodes do not display differently.

You can expand the nodes on the Configured Environments tree to view your configured environments, folders, and application files. Use the filtering commands on the toolbar to sort files alphabetically, display by name or title, or include the associated paths.

From the Configured Environments tree, you can manage content for each of your WebFOCUS environments. This includes creating new folders or files, opening existing files, and copying files. Right-click a node, folder, or file to view the shortcut menu of options. You can also open files by double-clicking them.

You can also use the Refresh Descendants option to refresh a specific application or folder. Right-click the application or folder that you want to refresh, and then click *Refresh Descendants*.

Note:

- ❑ You can use the shortcut menu on any file, select New, and click the type of content you want to create, to create new content in the same location.
- ❑ If a Master File is located in a nested folder (for example, folder xyz is within folder abc), you must first use the Reporting Server Console to map the nested application folder as a new application.

You can copy files from your desktop to the Configured Environments Tree.

From the Configured Environments node, you can access the following shortcut menu option:

- ❑ **Add.** Opens the WebFOCUS Environments Properties dialog box where you can add additional environments.

From your WebFOCUS environment, in the Environments Tree panel, you can access the following shortcut menu options:

- ❑ **Sign In.** Allows you to sign in to your WebFOCUS environment. This option is only available if you are not already signed in to your WebFOCUS environment.
- ❑ **Sign Out.** Allows you to sign out of your WebFOCUS environment. This option is only available if you are already signed in to your WebFOCUS environment.

Note: You can copy files that are not in App Studio and paste them in the Configured Environments tree to use those files when creating your application.

Reference: Data Servers

The Data Servers node lists each Reporting Server that the WebFOCUS Client can access. This node expands to display the files that you can use to develop WebFOCUS applications successfully.

The process of populating the application paths of the files in the Data Servers node is done on a background thread. While this background thread is running, you can navigate on the tree, open a folder, and create files. However, you will be unable to save a new file, or do anything that requires a path list, such as create a new style sheet, until the background thread completes. This section of the Configured Environments tree, which is visible, will populate.

From a data server, you can access the following shortcut menu options:

- ❑ **Manage Adapters.** Opens the Select Server Node dialog box from which you can configure a new adapter or edit the settings of an existing adapter.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and file information, such as date, time, and size.

From the Applications folder, you can access the following shortcut menu options:

- ❑ **New Application.** Creates a new application folder.
- ❑ **Configure Application Path.** Opens the Application Path dialog box from which you can create applications, add applications to the search path, map and reorder applications, delete applications or mappings from the path.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

From an application folder or a file, you can access the following shortcut menu options:

- ❑ **New.** Creates a new folder or file. The following shortcut menu options are available when pointing to *New*:
 - ❑ **Procedure.** Creates a new procedure folder in the your current application folder.
 - ❑ **Report.** Creates a new report.
 - ❑ **SQL Report.** Creates a new SQL report.
 - ❑ **Chart.** Creates a new chart.
 - ❑ **SQL Chart.** Creates a new SQL chart.
 - ❑ **HTML/Document.** Creates a new HTML page or document.
 - ❑ **Synonym.** Creates a new Master File after you have selected a configured adapter, or configure a new adapter.
 - ❑ **Synonym via Metadata Canvas.** Creates a new Master File in the Metadata canvas.

- ❑ **Define Function Library.** Creates a user-defined function library. Any user-defined functions created in this library are available for use in any content created within the same folder as the library. After the creation of the first function, you can create additional functions or edit existing ones. Once the initial function library is created, future additions or modifications are done through the Procedure View panel.
- ❑ **Upload Data.** Connects to the Reporting Server Console Upload wizard. For details, refer to the Server Console Help system.
- ❑ **WebFOCUS StyleSheet.** Creates a template WebFOCUS StyleSheet.
- ❑ **Text Document.** Creates a text document that can be saved to a local project. You can use the Add Comment or Remove Comment commands to comment on the file.
- ❑ **XML Document with ESRI Configuration.** Creates a new XML document using an ESRI configuration.
- ❑ **Application.** Creates a new application folder in your current application folder.
- ❑ **Duplicate.** Creates a copy of the selected file in the Data Servers node.
- ❑ **Copy.** Copies the selected file to the clipboard where you can paste it to a different node.
- ❑ **Paste.** Pastes the cut or copied file.
- ❑ **Rename.** Changes the name of the selected folder or file.
- ❑ **Delete.** Deletes the selected folder or file. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, *Cancel* will prevent all subsequent items from being deleted.
- ❑ **Properties.** Displays the folder properties in the Data Servers node.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

Reference: Projects

You can use the Projects node (optional) to develop content if, during installation, you used a serial number that allows project development. The Projects node is part of the Configured Environments tree. It helps you organize, develop, maintain, and deploy WebFOCUS applications as a project.

Projects does not require the web-tier APPROOT and the Reporting Server APPROOT to match. This is only necessary if you are developing content that requires the use of the Reporting Server. An example of content that uses the Reporting Server would be an HTML Page that runs procedures

If the APPROOTs do not match you will still see the Projects node and can create new projects. However, the content you create can only be saved on the web tier and cannot access Reporting Server files. An example of this type of content would be an HTML page that does not run procedures.

You can clear the option, *Start local Reporting Server*, in the App Studio Options dialog box, and if you try to create Reporting Server content, such as a report, you will receive an error when selecting a Master File.

You can specify a Reporting Server to use for project development in the Environments List dialog box.

From the Projects node, you can access the following shortcut menu options:

- ❑ **New Project.** Creates a directory in which you store your procedures. Opens the New Project dialog box which facilitates the creation of your new project.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

From a project folder, you can access the following shortcut menu options:

- ❑ **Rename.** Changes the name of the selected folder or file.
- ❑ **Delete.** Deletes the selected folder or file. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, Cancel will prevent all subsequent items from being deleted.
- ❑ **New.** Creates a new file. The following shortcut menu options are available when pointing to *New*:
 - ❑ **Procedure.** Creates a new procedure folder in the your current application folder.
 - ❑ **Report.** Creates a new report.
 - ❑ **SQL Report.** Creates a new SQL report.
 - ❑ **Chart.** Creates a new chart.
 - ❑ **SQL Chart.** Creates a new SQL chart.
 - ❑ **HTML/Document.** Creates a new HTML page or document.

- ❑ **Synonym.** Creates a new Master File after you have selected a configured adapter, or configure a new adapter.
- ❑ **Synonym via Metadata Canvas.** Creates a new Master File in the Metadata canvas.
- ❑ **Define Function Library.** Creates a user-defined function library. Any user-defined functions created in this library are available for use in any content created within the same folder as the library. After the creation of the first function, you can create additional functions or edit existing ones. Once the initial function library is created, future additions or modifications are done through the Procedure View panel.
- ❑ **Upload Data.** Connects to the Reporting Server Console Upload wizard. For details, refer to the Server Console Help system.
- ❑ **JavaScript File.** Creates a new JavaScript file from which you can create original JavaScript.
- ❑ **Cascading Style Sheet.** Creates a base template from which you can create a unique cascading style sheet (CSS).
- ❑ **WebFOCUS StyleSheet.** Creates a template WebFOCUS StyleSheet.
- ❑ **Text Document.** Creates a text document that can be stored to a project. You can use the Add Comment or Remove Comment commands to comment on the file.
- ❑ **Properties.** Displays the folder properties in the File/Folder Properties panel.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

Reference: Content

The Content node is storage space for data or information, and allows you to use App Studio to administer and develop against a Managed Reporting environment. The Content node lets you manage resources and applications on remote servers, as well as on your local machine if you have performed a full installation of App Studio. You can create and edit application files on all remote servers from one easily accessible interface. You can also create and administer reports for Managed Reporting from a Windows application rather than a web browser.

From a Content node, you can access the following shortcut menu options:

- ❑ **Impact Analysis.** Enables you to generate a list that identifies the procedures that access a specific Master File or field within a Master File.
- ❑ **New Folder.** Creates new folder.

- ❑ **Mode Manager.** Allows you to edit private files, if you have the proper authorization setting.
- ❑ **Security.** Enables you to control user permissions, which limit what development areas a user can access. The options are:
 - ❑ **Rules.** Opens the Security Rules dialog box, where you set up simple and advanced security rules for groups and users.
 - ❑ **Rules on this Resource.** Opens the Rules on this Resource dialog box, where you can view and run reports on the security rules defined for the repository.
 - ❑ **Effective Policy.** Opens the Effective Policy dialog box, where you can view the effective policy by privilege and user.
 - ❑ **Owner.** Opens the Set Resource Owner dialog box, where you can set the portal user, set the group to which the user belongs, and publish the portal. Since ownership is set at the Domain level, this option is not available for the folders and files under a Domain.
- ❑ **ReportCaster Explorer.** Opens the ReportCaster Explorer.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

From a folder or file, in the Content node, you can access the following shortcut menu options:

- ❑ **Impact Analysis.** Enables you to generate a list that identifies the procedures that access a specific Master File or field within a Master File.
- ❑ **New.** Creates a new file. The following shortcut menu options are available when pointing to *New*:
 - ❑ **Procedure.** Creates a new procedure folder in your current application folder.
 - ❑ **Report.** Creates a new report.
 - ❑ **SQL Report.** Creates a new SQL report.
 - ❑ **Chart.** Creates a new chart.
 - ❑ **SQL Chart.** Creates a new SQL chart.
 - ❑ **HTML/Document.** Creates a new HTML page or document.
 - ❑ **Visualization.** Creates a new chart, map, or grid.
 - ❑ **Alert.** Creates a new alert.
 - ❑ **Reporting Object.** Creates a new reporting object.
 - ❑ **URL.** Creates a new URL.
 - ❑ **JavaScript File.** Creates a new JavaScript file from which you can create original JavaScript.
 - ❑ **Cascading Style Sheet.** Creates a new cascading style sheet.
 - ❑ **WebFOCUS StyleSheet.** Creates a new WebFOCUS StyleSheet.
 - ❑ **Text Document.** Creates a new text document.
 - ❑ **Schedule.** Creates a new schedule.
 - ❑ **Distribution List.** Creates a new distribution list.
 - ❑ **Library Access List.** Creates a new library access list.
 - ❑ **Folder.** Creates a new folder.
- ❑ **Upload Data.** Connects to the Reporting Server Console Upload wizard. For details, refer to the Server Console Help system.
- ❑ **Publish/Unpublish.** Allows or suppresses public access to every file within the selected folder.

- ❑ **Hide/Show.** Hides or shows every file in the selected folder, to users who are permitted to access the folder. You can specify which users can see this content by changing the *Do not show on user's list* property in the File/Folder Properties panel.
- ❑ **Security.** Enables you to control user permissions, which limit what development areas a user can access. The options are:
 - ❑ **Rules.** Opens the Security Rules dialog box, where you set up simple and advanced security rules for groups and users.
 - ❑ **Rules on this Resource.** Opens the Rules on this Resource dialog box, where you can view and run reports on the security rules defined for the repository.
 - ❑ **Effective Policy.** Opens the Effective Policy dialog box, where you can view the effective policy by privilege and user.
 - ❑ **Owner.** Opens the Set Resource Owner dialog box, where you can set the portal user, set the group to which the user belongs, and publish the portal. Since ownership is set at the Domain level, this option is not available for the folders and files under a Domain.
- ❑ **Duplicate.** Creates a copy of the selected file in the Content node.
- ❑ **Copy/Paste.** Copies or pastes a folder or file.
- ❑ **Rename.** Changes the name of the selected folder or file.
- ❑ **Delete.** Deletes the selected folder or file. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, *Cancel* will prevent all subsequent items from being deleted.
- ❑ **ReportCaster Explorer.** Opens the ReportCaster Explorer.
- ❑ **Properties.** Displays the folder properties in the Content node.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

Note: For more information on publishing and unpublishing folders and items within the repository, see the *WebFOCUS Security and Administration* manual.

Reference: Scheduling

Scheduling allows you to indicate the method and time at which the procedure should run. You can schedule a procedure using one of the following options:

- ☐ Email
- ☐ FTP
- ☐ Printer
- ☐ Report Library
- ☐ Repository

For more information, see the *ReportCaster* manual.

Reference: Web Applications

The Web Applications node allows you to open files with the Text Editor, or the mode you used to create them.

Note: Based on the file type, different options may display.

From the Web Applications node, you can access the following shortcut menu options:

- ☐ **New Application.** Creates a new application folder.
- ☐ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

From an application folder, you can access the following shortcut menu options:

- ☐ **Rename.** Changes the name of the selected folder or file.
- ☐ **Delete.** Deletes the selected application folder. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, Cancel will prevent all subsequent items from being deleted.
- ☐ **New.** Creates a new file. The following shortcut menu options are available when pointing to *New*:
 - ☐ **HTML File.** Creates a page in html format. You can import existing HTML content, as well.
 - ☐ **JavaScript File.** Creates a new JavaScript file from which you can create original JavaScript.

- ❑ **Cascading Style Sheet.** Creates a base template from which you can create a unique cascading style sheet (CSS).
- ❑ **Folder.** Creates a new folder.
- ❑ **Properties.** Displays the folder properties in the File/Folder Properties panel.
- ❑ **Refresh Descendants.** Refreshes the contents of the application or folder in the Configured Environments tree to omit deleted files, and show new files and updated file information, such as date, time, and size.

From a file, you can access the following shortcut menu options:

- ❑ **Open.** Opens the file.
- ❑ **Edit in Windows Associated Tool.** Edits the file in your Windows associated tool.
- ❑ **Print.** Prints the file.
- ❑ **New.** Creates a new file. The following shortcut menu options are available when pointing to *New*:
 - ❑ **HTML File.** Creates a page in html format. You can import existing HTML content, as well.
 - ❑ **JavaScript File.** Creates a new JavaScript file from which you can create original JavaScript.
 - ❑ **Cascading Style Sheet.** Creates a base template from which you can create a unique cascading style sheet (CSS).
- ❑ **Duplicate.** Creates a copy of the selected file in the Web Applications node.
- ❑ **Copy/Paste.** Copies the selected file to the clipboard where you can paste it to a different node.
- ❑ **Rename.** Changes the name of the selected file.
- ❑ **Delete.** Deletes the selected application folder. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, Cancel will prevent all subsequent items from being deleted.
- ❑ **Properties.** Displays the folder properties in the File/Folder Properties panel.

Reference: Node Population

Population is a check to see what content, if any, is contained within a node in the Configured Environments tree. Node population occurs when you select a node in the Configured Environments tree. The node icon will be different depending on whether population has occurred. If a node contains files after population a green dot appears on the node icon. If a node does not contain files after population, a red dot appears on the node icon.

If a node has been populated and contains content, deleting that content will change the green dot to a red dot. Conversely, if a node has been populated and contains no content, creating content in that node will change the red dot to a green dot.

Reference: Master File Shortcut Commands

The following shortcut menu options are available for a Master File:

- ☐ **Open.** Opens the Master File in the Metadata canvas.
- ☐ **Create Report.** Opens the Report Wizard, where you can create a new report.
- ☐ **Create Chart.** Opens the Chart Wizard, where you can create a new chart.
- ☐ **Open in Text Editor.** Opens the Master File in the Text Editor canvas.
- ☐ **Edit in Windows Associated Tool.** Opens the Master File in your Windows associated tool. Note that this only appears if you have a Windows associated tool in which to open the file.
- ☐ **Refresh Synonym.** Regenerates the synonym. Use this option if the underlying object has been altered.
- ☐ **Sample Data.** Displays sample output for the Master File in the set browser.
- ☐ **Impact Analysis.** Enables you to generate a report that identifies the procedures that access a specific Master File or field within a Master File.
- ☐ **Print.** Prints the Master File.
- ☐ **Check.** Tests the validity of the Master File.
- ☐ **Edit Access File as Text.** Enables you to view and manually edit the Access File synonym.
- ☐ **New.** Creates a new folder or file. The following shortcut menu options are available when pointing to New:
 - ☐ **Procedure.** Creates a new procedure folder in the your current application folder.
 - ☐ **Report.** Creates a new report.

- ❑ **SQL Report.** Creates a new SQL report.
- ❑ **Chart.** Creates a new chart.
- ❑ **SQL Chart.** Creates a new SQL chart.
- ❑ **HTML/Document.** Creates a new HTML page or document.
- ❑ **Synonym.** Creates a new Master File after you have selected a configured adapter, or configure a new adapter.
- ❑ **Synonym via Metadata Canvas.** Creates a new Master File in the Metadata canvas.
- ❑ **Define Function Library.** Creates a user-defined function library. Any user-defined functions created in this library are available for use in any content created within the same folder as the library. After the creation of the first function, you can create additional functions or edit existing ones. Once the initial function library is created, future additions or modifications are done through the Procedure View panel.
- ❑ **Upload Data.** Connects to the Reporting Server Console Upload wizard. For details, refer to the Server Console Help system.
- ❑ **WebFOCUS StyleSheet.** Creates a template WebFOCUS StyleSheet.
- ❑ **Text Document.** Creates a text document that can be stored to a local project. You can use the add or remove comment to comment the file.
- ❑ **XML Document with ESRI Configuration.** Creates a new XML document using an ESRI configuration.
- ❑ **Application.** Creates a new application folder in your current application folder.
- ❑ **Duplicate.** Creates a copy of the selected file.
- ❑ **Copy/Paste.** Copies the selected file to the clipboard where you can paste it to a different node.
- ❑ **Rename.** Changes the name of the selected file.
- ❑ **Delete.** Deletes the selected file. You will be prompted to confirm your deletion. Click *No* if you do not want to delete an item, or click *Cancel* to abort the delete operation. If you choose to abort the delete operation while deleting a list of items, *Cancel* will prevent all subsequent items from being deleted.
- ❑ **Properties.** Displays the folder properties in the File/Folder Properties panel.

Note: When a Master File is opened in the Text Editor canvas or the Metadata canvas, all other open options from the shortcut menu are unavailable.

Opening Files in the Configured Environments Tree

In addition to opening files through the Application menu, or from the Quick Access Toolbar, you can also open files from the development areas in the Configured Environments tree.

- ❑ To open a file in its native canvas, double-click the file or right-click the file, and then click *Open*.
- ❑ To open a file in the Text Editor canvas, right-click the file and then click *Open in Text Editor*.
- ❑ To open a file in a Windows Associated Tool, right-click the file and then click *Open in Windows Associated Tool*. This option appears only if a Windows associated tool is available. When you access this functionality, the file will open in a separate dialog box using the relevant Windows tool.

Note: Files can only be opened in one area of App Studio at a time to ensure that your changes are not overwritten by another opened version of the file. However, you are able to open a file in App Studio and in a Windows Associated Tool at the same time. To ensure that your changes are saved properly, you should only modify one opened version of the file at a time.

Viewing Files in the Configured Environments Tree

In addition to opening editable files through the Configured Environments tree, you can also view file types that are not editable in App Studio. Viewable file types include:

- ❑ .doc
- ❑ .ftm
- ❑ .mht
- ❑ .wp

To view a file, right-click it and select *View* from the shortcut menu, or double-click it. The file opens in the program you associate it to on your computer.

Note: The above file types appear in the Configured Environments tree when you click the *Show all content files* button from the Environments Tree toolbar.

Setting Up Access to WebFOCUS Environments

As you set up access to WebFOCUS environments, your settings are retained in a file named `wfscom.xml`. WebFOCUS environment settings are typically stored in the following locations.

Windows 7:

```
drive:\Users\user_id\
  AppData\Roaming\Information Builders\wfscom.xml
```

where:

`user_id`

Is your Windows user ID.

Note:

- ❑ This file and directory might not be visible by default. To see this directory, open the Windows Control Panel, click *Folder options*, and then click the *View* tab. Select *Show hidden files, folders, and drives*, and click *OK*.
- ❑ User IDs and passwords stored in `wfscom.xml` are encrypted to keep them confidential.
- ❑ WebFOCUS environment properties apply to your current App Studio configuration.
- ❑ To ensure access to the WebFOCUS tools that create charting procedures, alert procedures, and Reporting Objects, you must develop against WebFOCUS environments that are Release 8.0 Version 0.5 or higher. When App Studio connects to a WebFOCUS environment, of a prior release, you will receive a WFSCOM message.

You can choose to remove this environment from your configuration files or leave the environment, and continue to develop against other environments that you configure. If you choose to remove the environment from your configuration files, you must restart App Studio.

Procedure: How to Add a WebFOCUS Environment

A WebFOCUS environment consists of a web server, a WebFOCUS Client, and a Reporting Server. Adding WebFOCUS environments lets you create and manage multiple environments, such as development, test, and production instances.

To add a WebFOCUS environment, do the following:

- ❑ Specify a web server that includes a host name and port number.
- ❑ Configure the HTML alias/context root to access the WebFOCUS Client.

- ❑ Provide the appropriate user credentials if web server authentication is required.

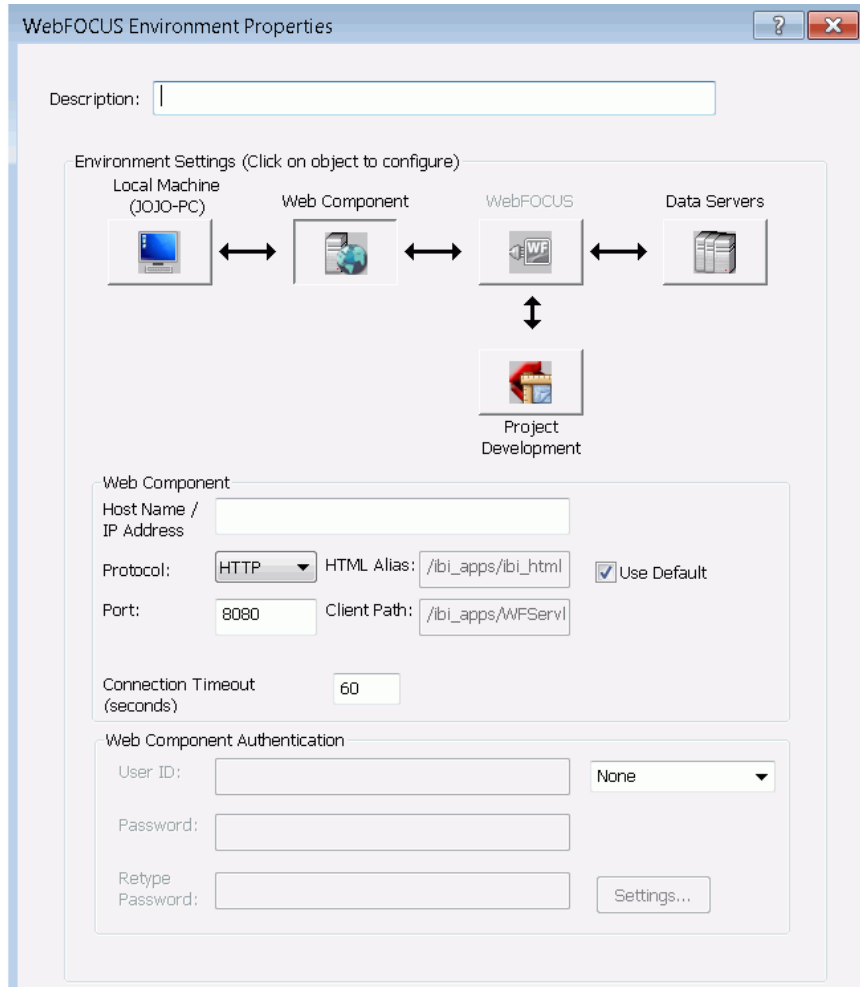
The following procedure provides the information you need to add a WebFOCUS Environment.

1. On the *Home* tab, in the *Utilities* group, click *Environments*.

The Environments List dialog box opens. This dialog box lists all WebFOCUS environments defined for App Studio.

2. Click *Add*.

The WebFOCUS Environment Properties dialog box opens, as shown in the following image.



At the top of the dialog box is the Description field, followed by the Environments Settings area. The Environments Settings area contains a series of buttons that represent components in a WebFOCUS environment, and the required parameter fields to configure that environment. When you configure an environment, the areas below the buttons can change according to the parameters that are required.

3. In the Description field, type a description for the WebFOCUS environment. This description appears in the Configured Environments tree.

Note: The description cannot contain special characters, such as ., /, \, ?, *, and others. A message with characters not allowed appears if one of the restricted characters is detected during validation.

4. In the Web Component area, specify the web server information.

For some environments, once you specify the web server, all other settings default. If the WebFOCUS environment you are accessing does not use default settings, or the components require authentication, click the appropriate button in the Environment Settings area to provide the parameters. The areas that follow explain the parameters available for each component.

Note: WebFOCUS environment properties must be supplied in a specific order. For example, if web server security is enabled, you cannot set the WebFOCUS Client script name until you have provided valid web server credentials. Similarly, you cannot retrieve a list of Reporting Servers until you have provided a valid WebFOCUS Client Path.

As you select a component button in the WebFOCUS Environment Properties dialog box, App Studio ensures that it has the necessary information before it displays the properties of that component in the lower part of the dialog box. If the required information is not available, you cannot proceed to the next component.

5. Click *OK*.

The WebFOCUS Logon - WebFOCUS dialog box opens and prompts you for a WebFOCUS ID and password.

The WebFOCUS logon dialog box populates the ID *wfdesktop*, by default. This user ID is configured with WebFOCUS and allows self-service development: development from the Projects (optional), Data Servers, and Web Applications area.

Access to the Repository is restricted, and you cannot create new content with this user ID. You can only see and run published content.

There is a check box option on the logon dialog box for remembering the ID or password. By default, it is not selected. If you select this box, your credentials are stored and encrypted in the *wfscom.xml* file, the local configuration file that stores information processed by the App Studio communication layer.

To clear stored credentials, open the WebFOCUS Environment Properties dialog box and select the environment that users need to make changes. Click *WebFOCUS Client*. Under WebFOCUS Credentials, delete the User ID and Password information, and then clear the Supply Credentials check box.

Note: A logon dialog box can also open for connection to the web server, application server, or Reporting Server, depending on the security implemented in the WebFOCUS environment that is being accessed.

6. Type the appropriate user name and password, and then click *Logon*.
The WebFOCUS Environment Properties dialog box closes.
7. In the Environments List dialog box, click *OK*.

Setting Up Local Machine Properties

Local Machine properties are optional. Click the *Local Machine* button to access the WebFOCUS Environment Caching area. Select the options in this area to cache remote directory and file information, and enable file-content caching.

The file content caching location path is for a Windows 7 machine.

In caching, copies of files or information stored on a remote machine are temporarily stored on your local App Studio machine. App Studio then works with the locally stored files.

Caching speeds App Studio performance because remote machines are not accessed and queried every time you request information. This is especially useful when accessing mainframes or when a network connection is slow.

However, caching should not be used when multiple developers are working with the same files because they could overwrite changes made by other developers. By default, caching is not enabled.

Two properties are available:

- ☐ **Cache remote directory and file information.** This option caches information about files stored in the WebFOCUS environment. This does not actually cache files, only information about them. If you select this property, App Studio does not requery the Reporting Server every time it needs a list of files stored in the WebFOCUS environment.
- ☐ **Enable file content caching.** This option caches files typically stored on the server. App Studio only retrieves files once. When you want to read or edit your files, App Studio uses a cached copy. When you edit a cached file, the edited cached file is returned to the server and replaces the actual file on the server.

App Studio retrieves information and files the first time you request them and then caches them locally. App Studio then uses the cached copies until App Studio is restarted, or you click the *Clear* buttons for each level.

Note:

- ❑ If you create a new synonym, you have to perform a refresh to view the new files in the App Studio Environments Tree panel when caching is enabled.
- ❑ You cannot use the caching options for the local development environment if the Source Control feature is enabled.

Specifying Web Component Properties

The *Web Components* button is typically selected by default. Web Component properties specify how App Studio accesses the web server. The web server must be identified before any other components.

The following properties are available:

- ❑ **Host Name/IP Address.** Specifies the host name or IP address where your web server is running. This field is required and has no default value.
- ❑ **Protocol.** The protocol to use for accessing the web server (HTTP or HTTPS).
- ❑ **Port.** The TCP/IP port for accessing the web server. Port 8080 is the default.
- ❑ **HTML Alias.** Identifies the alias used to access content from the WebFOCUS environment directory, `ibi_html`. In App Studio, there is no need to configure an `ibi_html` alias. The `ibi_html` content is accessed through the `ibi_apps` alias. The configuration of this alias is:

`/ibi_apps/ibi_html`

where:

`ibi_apps`

Is customizable.

`ibi_html`

Is constant.

- ❑ **Client Path.** Specifies how calls are made from App Studio to the web server. By default, when you add a new WebFOCUS environment, it is set to use the WebFOCUS Servlet with the default `ibi_apps` context path:

`/ibi_apps/WFServlet`

where:

`ibi_apps`

Is customizable.

`WFServlet`

Is constant.

If the WebFOCUS environment uses a non-default context path, clear the *Use Default* check box and provide the correct Client Path. For example:

`/ibi_apps8/WFServlet`

If the Client Path is incorrect for the environment, you receive an error when you click the *WebFOCUS* button at the top of the page, or when you click *OK* to exit and save your changes.

If you do not know your path, ask your WebFOCUS Administrator or check the WebFOCUS Administration Console of the environment to which you want to connect. The Client Path settings for the environment are located under *Utilities* and *Client Selection*.

- ☐ **Use Default.** Specifies that the default `ibi_html` alias is used. Keep this option selected unless you change the HTML Alias value.

Note:

- ☐ If the Client Path field is empty, and the *Use Default* check box is selected, there is a problem connecting to the WebFOCUS Client. Ensure your web server is started and that you typed the correct properties on the Web Components page. If you cannot connect, contact your WebFOCUS Administrator.
- ☐ If while providing a custom HTML Alias and Client Path, your connection fails because of incorrect information and the Client Path is deleted, you can clear *Use Default* to restore the values you entered. Click the *Use Default* check box to edit the HTML Alias and Client Path, and type the correct information. If a custom `ibi_apps` alias or context path is used, it needs to be entered in both the HTML Alias and Client Path fields. For example:

HTML Alias:

`/ibi_apps8/ibi_html`

Client Path:

`/ibi_apps8/WFServlet`

- ❑ **Connection timeout.** The default time to connect to a WebFOCUS environment is 60 seconds. However, in some slow systems this needs to be increased to avoid connection failures when the timeout period is reached. If timeout issues are experienced, please increase this to 240 or higher. Also, increasing the timeout can address issues with slow environments or environments that have many resources (Applications/files) during development.
- ❑ **Web Component Authentication.** Specifies whether authentication is required on the web server. To set security, select *Basic* in the drop-down list, and type a web server user ID and password. If this is set to *None*, the web server allows anonymous access.

For more information, see the *WebFOCUS Security and Administration* manual.

WebFOCUS Properties

When you click the *WebFOCUS* button, App Studio makes a connection to your web server to retrieve information about the WebFOCUS environment. Therefore, you have to first specify Web Component properties, and your web server must be running.

You are prompted to sign in to WebFOCUS to verify your configuration. You will also be prompted to sign in to WebFOCUS if you click *OK* to exit the dialog box.

The following properties are available:

- ❑ **Client Path.** Is specified in the WebFOCUS Component properties area, and only appears in this pane for reference. This field is read-only and can only be changed in the WebFOCUS Component properties area.
- ❑ **Select Language.** Specifies the language of the WebFOCUS Client.
- ❑ **Supply Credentials.** Specifies whether to supply and store credentials when you connect to WebFOCUS and access the environment.

When the correct WebFOCUS Client Path is provided, you can specify properties for the remaining component.

Data Server Properties

You can set authentication and view available Reporting Servers by clicking the *Data Servers* button. When you select *Data Servers*, App Studio connects to the WebFOCUS Client and retrieves a list of servers from its communication configuration file (odin.cfg).

The following property is available:

- ❑ **Supply Credentials.** If selected, you can type a WebFOCUS Server ID and password for the server highlighted in the list. Clicking *Set* stores the credentials with the environment properties, and the ID entered is shown next to the server in the list. The credentials are checked the next time you use a feature on that server, not when you click *Set*.

Specifying the Project Development Server

Note: These properties only apply to self-service application development, and when performing project development.

If you use remote Project-based development and your remote environment has multiple Reporting Servers, click the *Project Development* button to specify which server to use when processing requests. This server is referred to as the Project Development Server. The Project Development Server and the WebFOCUS Client must be installed on the same machine or use the same Application Root directory (APPROOT directory) as each other.

The following property is available:

- ❑ **Project Development Server.** This specifies which server to use for Project Development. All servers defined in the WebFOCUS Client appear in the drop-down list.

Procedure: How to Edit an Existing WebFOCUS Environment

1. On the *Home* tab, in the *Utilities* group, click *Environments*.
The Environments List dialog box opens.
2. Select the environment that you want to edit.
3. Click *Properties*.
The WebFOCUS Environment Properties dialog box opens.
4. Edit the WebFOCUS environment accordingly, and then click *OK* to accept your changes.
5. In the Environments List dialog box, click *OK*.

Procedure: How to Add a New Project

To add a project to the Projects node:

1. In the Configured Environments tree, right-click the *Projects* node, and select *New Project*.
The Create a Project wizard opens.
In the Create a Project - Step 1 of 2 dialog box, you can:

- ☐ Type a name for the new project you are creating.
 - ☐ Select a different directory name, or browse for an existing directory.
 - ☐ View the location and name of the new project.
2. In the first input field, type a name for the new project. The name can be a maximum of 18 characters in length including spaces.
 3. The Create a Project wizard displays the project name as the default directory in the second input field. You can optionally enter the name of a subdirectory associated with another project file, so that the new project shares project files with the existing project.

The location and name of the new project displays at the bottom of the dialog box.

4. Click *Next*.

A message displays if the directory does not exist.

5. Click *Yes* to create the new directory.

The Create a Project - Step 2 of 2 dialog box opens.

From this dialog box, you can add other directories to the project path. Project files in those directories are visible to the project and are accessible for development.

6. Click *Add* to add other directories to the project path.
7. Select a folder you want to add to the project path, and then click *OK*.

Repeat this step to add more directories to the project path.

- ☐ To change the order of the directories, select the directory, and click *Move Up* or *Move Down*.
 - ☐ To remove a directory from the list, select the directory, and click *Remove*.
8. When you are satisfied with the order of the directories, and have no other changes, click *Finish*.

The new project now appears under the Projects node.

You can update the directory folders associated with a Project after you create it by right-clicking the Project and selecting *Properties*. The Properties dialog box opens, click the *Paths* tab. In the Related Application Paths area, you can add, delete, and reorder the directory folders. Click *OK* to accept the changes.

Mode Manager

If you have the *manage private resources* permission, you can use Mode Manager to view and edit private files. To enable Mode Manager, right-click on the Repository node and click *Mode Manager*. Your view refreshes, displaying all private files in the Repository. You can open and make changes to these private files as needed. When you are finished, right-click on the Repository node and click *Mode Normal*. Your view refreshes, hiding the private files in the Repository node.

Note: When a file in the Repository is marked as shared, and you do not have permission to save the original file, you will only be allowed to use the Save As command to save the file. This will allow you to save the file under a different name, leaving the original file untouched.

Working With the Environments Detail Panel

The Environments Detail panel is an optional panel, which contains panel customization commands, the Environments Detail toolbar, the Configured Environments tree, and the Details pane. To display the Environments Detail panel, on the *Home* tab, in the *View* group, select the *Environments Detail* check box.

The Environments Detail panel is similar to the Environments Tree panel except that content is displayed in the Details pane rather than under the Configured Environments tree.

From the Environments Detail panel, you can:

- ❑ Customize the appearance of the panel.
- ❑ Filter content listed under the WebFOCUS environments in the Configured Environments tree.
- ❑ Access configured WebFOCUS environments to create new content or modify existing content.
- ❑ Refresh an application or folder in the Configured Environments tree, to view new files and updated file information, and omit deleted files.

When you select a folder in the Configured Environments tree, the content within that folder is shown in the Details pane.

Reference: Environments Detail Toolbar

The Environments Detail toolbar contains the buttons and menus that you need to navigate and filter the information that appears in the Configured Environments tree.

View Options

Presents options for viewing items (for example, alphabetical sorting or grouping), as described in [Environments Tree Toolbar](#) on page 98. Note that the available icons for the Environments Detail toolbar and the Environments Tree toolbar are the same.

Note: To sort content in the Environments Detail panel, you do not use the View Options command. Instead, you would click the columns at the top of the Details pane to sort content by either name, size, type, last modified, or location.

Showing the Properties of a Folder or File Using the File/Folder Properties Panel

The File/Folder Properties panel is always open and shows the properties of a project folder or the files within a project. The File/Folder Properties panel is shown in the following image.

The screenshot shows the 'File/Folder Properties' window with two tabs: 'General' and 'Data Server'. The 'General' tab is active, displaying a list of properties for a file named 'act108.fex'. The 'Data Server' tab is also visible, showing the 'Server' property set to 'EDASERVE'.

File/Folder Properties	
General	
Name	act108.fex
Title	act108
Summary	
Development Environment	bigscm64
Parent Folder	IBFS:/WFC/Repository/DanG
Full Path	IBFS:/WFC/Repository/DanG/...
Created On	Thursday, October 22, 2015, 11...
Created By	admin
Last Modified On	Thursday, October 22, 2015, 11...
Last Modified By	admin
Last Accessed On	Thursday, October 22, 2015, 11...
Last Accessed By	admin
Properties	tool=editor
Size	346 bytes
Sort Order	
Status	Private/User: admin
Do not show on user's list	No
Prompt for parameters	Yes
Run with OLAP	No
Only run as deferred report	No
Schedule only	No
Enable Auto Linking	No
Auto Link Target	No
Source Control Status	_not_set
Data Server	
Server	EDASERVE
Application Paths	

The options within this panel change according to the type of file or folder you select. You can view the properties of a file or folder in the Data Servers, Projects (optional), and repository areas of the Configured Environments tree.

Copying Property Values in the File/Folder Properties Panel

You can copy a property value from the File/Folder Properties panel. Right-click a property value and click *Copy* to copy it to the clipboard. This is particularly useful if you want to capture the full path of an open file.

Editing Properties in the File/Folder Properties Panel

The following table defines the properties that you can change for each node within the File/Folder Properties panel.

Note: The changes that you make in the File/Folder Properties panel are not reflected in the Configured Environments tree until you click outside of the panel.

Data Servers

Element	Editable Panel Properties
Node	<div><input type="checkbox"/> Title. Changes the title of the Data Server node in the Configured Environments tree.</div> <div><input type="checkbox"/> Server Path. Indicates the fully-qualified path to the server.</div>
Primary Folder	<div><input type="checkbox"/> Title. Changes the title of the primary folder in the Configured Environments tree.</div> <div><input type="checkbox"/> Server Path. Indicates the fully-qualified path to the server.</div>
Subfolder	<div><input type="checkbox"/> Name. Changes the name of the selected subfolder in the Configured Environments tree.</div>
File	<div><input type="checkbox"/> Name. Changes the name of the selected file in the Configured Environments tree.</div>

Projects

Element	Editable Panel Properties
Node	<ul style="list-style-type: none"> <input type="checkbox"/> Title. Changes the title of the Projects node in the Configured Environments tree. <input type="checkbox"/> Server Path. Indicates the fully-qualified path to the server.
Project Folder	<ul style="list-style-type: none"> <input type="checkbox"/> Name. Changes the name of the selected project folder in the Configured Environments tree. <input type="checkbox"/> Application Paths. You can manually modify the name of the current application path or you can select a new path using the ellipsis (...) option.
Files	<ul style="list-style-type: none"> <input type="checkbox"/> Name. Changes the name of the file in the Configured Environments tree.

Content/Repository

Element	Editable Panel Properties
Node	<ul style="list-style-type: none"> <input type="checkbox"/> Title. Changes the title of the repository node in the Configured Environments tree. <input type="checkbox"/> Server Path. Indicates the fully-qualified path to the server.

Element	Editable Panel Properties
Folder	<div><div><input type="checkbox"/> Name. Changes the name of the folder in the Configured Environments tree.</div><div><input type="checkbox"/> Title. Changes the title of the folder in the Configured Environments tree.</div><div><input type="checkbox"/> Summary. Adds summary information to the folder properties.</div><div><input type="checkbox"/> Sort Order. Specifies the order in which to list the folder or item in the tree.</div><div><input type="checkbox"/> Do not show on user's list. This value is set to No by default. If Yes is selected, this folder will display on the user's list.</div><div><input type="checkbox"/> Auto Create My Content Folders. This value is set to Yes by default to create a My Content folder for saving personal reports, charts, or documents. You can optionally set this to No to disable this functionality.</div><div><input type="checkbox"/> Automatically Open. This value is set to No by default. If Yes is selected, this folder will automatically be open in the next session of App Studio.</div><div><input type="checkbox"/> Server. This value defaults to the server that is currently in use. You can use the drop-down list to affiliate a different server with the folder.</div><div><input type="checkbox"/> Application Paths. This value defaults to the application path indicated for the selected folder. You can modify this value as needed.</div></div>

Element	Editable Panel Properties
File	<ul style="list-style-type: none"> <input type="checkbox"/> Name. Changes the name of the file in the Configured Environments tree. <input type="checkbox"/> Title. Changes the title of the file in the Configured Environments tree. <input type="checkbox"/> Summary. Adds summary information to the folder properties. <input type="checkbox"/> Sort Order. Specifies the order in which to list the file in the tree. <input type="checkbox"/> Do not show on user's list. This value is set to No by default. If Yes is selected, this file will display on the user's list. <input type="checkbox"/> Prompt for parameters. This value is set to Yes by default. If No is selected, you will not be prompted for parameters. <input type="checkbox"/> Run with OLAP. This value is set to No by default. If Yes is selected, you can run the report or procedure with OLAP. <input type="checkbox"/> Only run as deferred report. This value is set to No by default. If you select Yes, the report or procedure will run only as a deferred report. <input type="checkbox"/> Use Title for Deferred Report Description. This value is set to No by default. If you select Yes, the title is used instead of the name, as the description for a deferred report. <input type="checkbox"/> Schedule only. This value is set to No by default. If Yes is selected, you will only be able to schedule the report or procedure. <input type="checkbox"/> Enable Auto Linking. This value is set to No by default. If Yes is selected, Auto Linking enables you to develop and maintain numerous referenceable reports and charts that can be linked together. <input type="checkbox"/> Auto Link Target. Indicates whether the file is set as a target for an Auto Link drill down. This value is set to No, by default. <input type="checkbox"/> Server. This value defaults to the server that is currently in use. You can use the drop-down list to affiliate a different server with the file. <input type="checkbox"/> Application Paths. This value defaults to the application path indicated for the selected file. You can modify this value as needed.

Application Paths Dialog Box

If the Projects node is selected (optional), the Application Paths of a project folder (.gfa) display in the File/Folder Properties panel when you select the project from the Projects area. You can add, remove, or reorder the associated application paths in the Application Paths dialog box.

Open the Application Paths dialog box by clicking the ellipsis button next to the Associated Paths information. The Application Paths dialog box displays a list of applications that you can associate with your project and a list of projects that are currently associated with your project.

Adding or Removing Applications

To add an application to the project, click the name of the application in the Available list, and then click add. Click *OK* to view your changes in the File/Folder Properties panel.

To remove an application from the project, click the name of the application in Selected list, and then click remove. Click *OK* to view your changes in the File/Folder Properties panel.

Reordering Applications

To reorder an application in the Available list, click the name of the Application and then click up or down. Click *OK* to view your changes in the File/Folder Properties panel.

Editing Areas of Functionality Using the View Tabs

You can use the view tabs to edit different areas of functionality for the same document. These tabs show information that would be inaccessible from any other view tab.

Designing the Layout of a Page Using the Design View Tab

The Design View tab is accessible when you are creating an HTML page or document. From here, you can design the layout of your page by adding controls and components to the canvas. This is tab is selected by default when you are creating an HTML page or document.

Creating and Modifying Parameter Values Using the Parameters View Tab

The Parameters View tab is accessible when you are creating an HTML page or active dashboard. From here, you can create and modify parameter values, input controls, and customize parameter conditions. You can also bind parameters to controls and chain controls to one another.

The Parameters tab consists of the following components:

- ☐ Input control objects.

You may select the input control object to view and edit the Properties and settings of the control.

- ❑ Creating an input control from the Design view prompts you to create a bound parameter on the Parameters tab.
- ❑ Editing an input control, which is inserted when setting input controls for new parameters.
- ❑ Add new parameters.

Right-click anywhere on the Parameters tab to add a new parameter.

Note: Manually adding a parameter creates an unbound parameter.

- ❑ Refresh unresolved parameters.

All parameters on the parameters tab are parsed every two minutes to check if any are unresolved. If there are any unresolved parameters, their surrounding polygon is colored red. If you want to check for unresolved parameters on demand, right-click and select *Refresh unresolved*.

- ❑ Binding controls and parameters.

Input controls and parameters can be bound and unbound from the Parameters tab.

You may bind a parameter to an input control, or bind an input control to a parameter.

- ❑ Binding a parameter to a control makes it an incoming parameter that will populate the control. Drag a parameter object to a control object on the Parameters tab.
- ❑ Binding a control to a parameter will populate the parameter. Drag a control object to a parameter object on the Parameters tab.
- ❑ Chain one control to another.

Chaining will populate controls based on the selected value from the prior control in the chain. You can chain static and dynamic controls, link or unlink parts of a chain, and create conditions on links in a chain. Chains are represented by lines connecting control objects on the Parameters tab. By clicking the arrow head in a link of a chain, the Properties and settings dialog box enables you to modify and set properties and conditions of the chain.

Note: Chaining is applicable only for controls, not parameters.

Creating JavaScript and Cascading Style Sheets Using the JavaScript/CSS View Tab

The Embedded JavaScript/CSS View tab is accessible when you are creating an HTML page. From here, you can create JavaScript code and Cascading Style Sheets for use in your HTML page. You can reference existing Cascading StyleSheet files and JavaScript files by typing the URL in the URL/Find File area of the Settings panel. You can also search for these files by using the CSS or JavaScript commands.

Embedded code is used only in the host HTML file. External code is available to be used by multiple files.

Customizing WebFOCUS App Studio Panels

Similar to the ribbon tabs, App Studio features open panels that provide additional options to assist in the development of your application. Not all panels open at the same time, nor do they provide the same options. When you launch App Studio for the first time, only the Environments Tree panel appears docked to the edge of the canvas. The File/Folder Properties panel also appears, but is auto hidden.

All panels, except the Environments Tree panel, are auto hidden by default. You can control the visibility of the panels in the View groups on the Home tab and Utilities tab. You can also customize the appearance and placement of each panel around your canvas.

By default, all panels, except the Environments Tree panel, are auto hidden when they first open. You can use the panel customization options, which are located in the upper-right corner of the panel, to change the appearance and location of the panels around the canvas.

Procedure: How to Rearrange Panels on the Canvas

To rearrange a panel on your canvas using the panel properties menu, follow these steps:

1. Click the *Window Position* button .

The panel properties menu opens.

2. Select an option from the panel properties menu.

The options available are:



- ☐ **Floating.** Undocks the panel and allows you to move it freely around the canvas.
- ☐ **Docking.** Docks the panel onto the edge of your canvas where it last appeared.
- ☐ **Tabbed Document.** Opens the panel in the canvas area, as a tab. This option is unavailable in App Studio.

- ❑ **Auto Hide.** Hides the panel as a tab on the edge of your canvas. When you pause over the tab, the panel reopens. .
- ❑ **Hide.** Closes the panel.


Note: You can also open the panel properties menu if you right-click the top of the panel.

Procedure: How to Pin and Unpin Panels to the Canvas

You can pin a panel to the canvas to keep it open while you develop your application. When you unpin the panel, it becomes auto hidden again, and appears as a tab on the edge of the canvas. When you hover the mouse over this tab, the panel reopens.

- ❑ To pin a panel to your canvas, click the *Auto Hide* horizontal pin button .
- ❑ To unpin a panel to your canvas, click the *Auto Hide* vertical pin button .

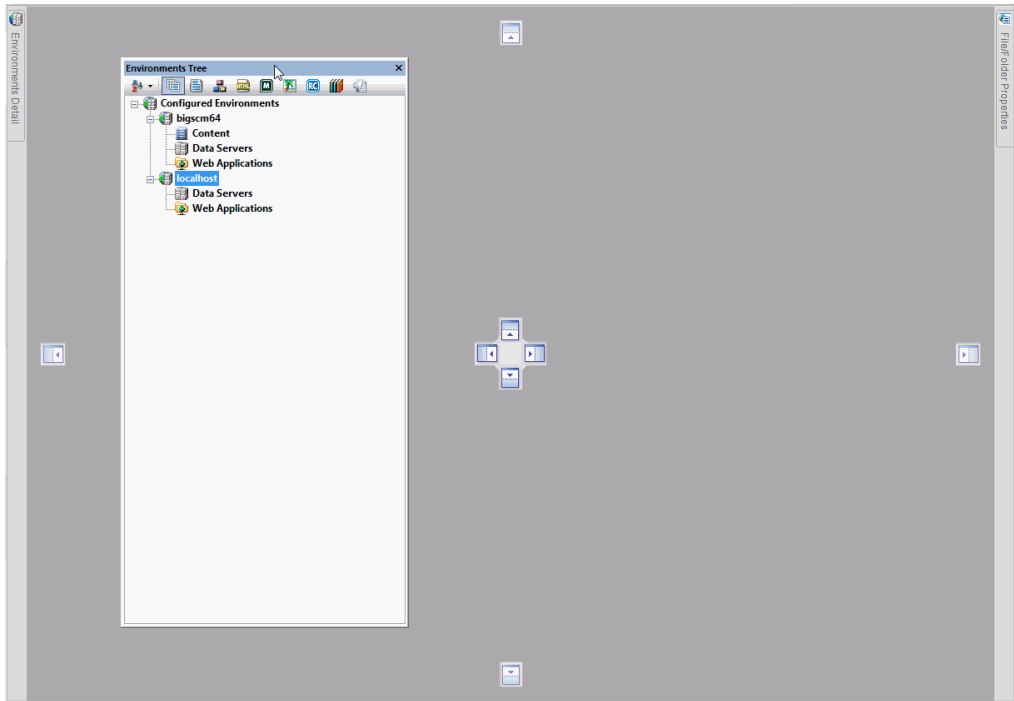
Procedure: How to Close and Reopen Panels

- ❑ To close a panel, click *Close*  in the upper-right corner of the panel.
- ❑ To reopen the panel, go to the *Home* tab, and in the *View* group, and select the appropriate check box.

Using Handles

You can dock floating panels within the canvas to ease accessibility. When you drag a panel across the App Studio canvas, a set of handles appears. These handles guide the placement of the panel, and automatically dock the panel to the edge of the canvas upon which you rest the mouse.

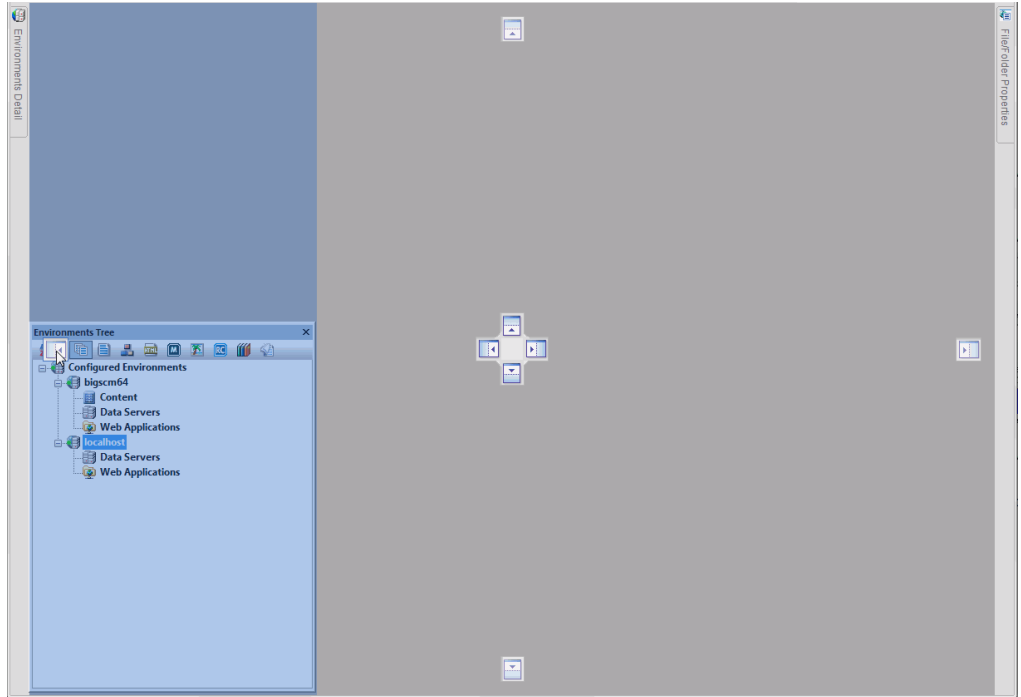
The following image shows an example of the handles that appear when you drag the Environments Tree panel across the canvas.



Procedure: How to Dock Panels Around the Canvas Using Handles

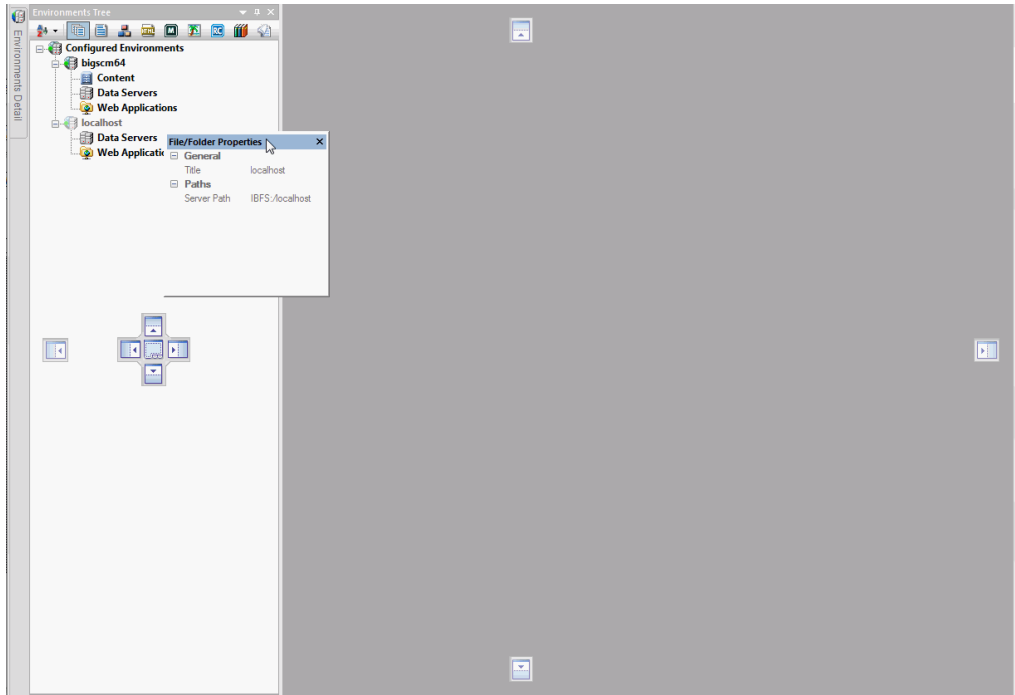
1. From the panel customization toolbar, click the arrow, and then click *Floating*.
2. Drag the panel across the canvas and rest the mouse on a handle.

When you rest the mouse over a handle, a shaded area appears. This shaded area provides a preview of where the panel will dock if you release the mouse, as shown in the following image.



3. Release the mouse when you are satisfied with the previewed location of the panel.
The panel automatically docks to the edge of the canvas.

Additional panels open as you develop applications throughout the product. To conserve space around the canvas, you can combine these panels. When you mouse over a docked panel, a tabbed handle option appears, as shown in the following image.



This handle option combines the panels into a single container with tabs. You can switch between the panels by clicking the appropriate tab at the bottom of the container. An example of the Environments Tree tab and File/Folder Properties tab, in a combined panel container, are shown in the following image.



Creating and Editing Metadata in WebFOCUS App Studio

Defined simply, metadata is *data about data*. Metadata describes the characteristics of your data sources to App Studio and gives it the information it needs to access those data sources. This insulates you from the need to know how to optimally access the data, so that you can concentrate on using the data for reporting, charting, visualizations, and applications. Examples of metadata components are data type, data location, and data content and information about how to connect to it. Metadata can be generated whenever data is created, acquired, added to, deleted from, or updated in any data source within an enterprise.

In this chapter:

- ❑ [Understanding Data Terminology](#)
- ❑ [Accessing Data](#)
- ❑ [Generating a Synonym](#)
- ❑ [Changing Views in the Metadata Canvas](#)
- ❑ [Viewing and Editing Synonym Attributes](#)
- ❑ [Viewing Data Profiling Characteristics](#)
- ❑ [Enhancing a Master File With Expressions](#)
- ❑ [Describing Group Fields and Repeating Fields in a Synonym](#)
- ❑ [Parameterizing a Synonym With Variables](#)
- ❑ [Adding Indexes to a Synonym](#)
- ❑ [Creating Cluster Joins and Dimension Views](#)
- ❑ [Creating a Synonym for Cube Data Sources](#)
- ❑ [Defining a Business View of a Master File](#)
- ❑ [Applying Database Administrator \(DBA\) Security](#)
- ❑ [Implementing DBA Security Using WebFOCUS Language](#)
- ❑ [Analyzing Procedures Using Impact Analysis](#)

Understanding Data Terminology

The smallest meaningful element of data in a data source is referred to as a column (for relational data sources) or a field (for non-relational data sources). Column and field are using interchangeably throughout this content. Every column or field has several characteristics, such as the data type (character, date, integer, or some other type) and length or scale. Field characteristics can also include output display options, such as comma inclusion, currency symbol, date display, and so on. For consistency, all fields should be included in the metadata, so all users get the same view of the data. However, you can create a logical view of the data in which only a subset of the fields are available.

Certain fields in a data source may have a one-to-one relationship with each other and describe a group of related characteristics. For example, each unique ID number represents only one employee. These fields can be grouped together into a segment or, in relational terms, a table. You can relate segments to each other by creating a multi-segment data source or by joining segments together. Segments are the building blocks of larger data structures.

Fields can be categorized as measures (facts) or dimensions based on how they will be used in a request.

A measure or fact is a numeric value, such as Gross Profit or Cost of Goods Sold, that you may want to aggregate. All numeric values that can logically be summed are measures. Numeric fields that cannot be summed, such as product number and order ID, are not treated as measures. Instead, they may be used in the same way as dimension fields to analyze measures. It is up to you to understand your data and determine whether each numeric field should be summed. Related measures can be organized into measure groups. For example, Gross Profit and Cost of Goods Sold can be part of a Sales measure group.

A dimension is a way to categorize data. You can use a dimension to analyze and compare measures. Generally, any field that is not a measure, usually an alphanumeric field such as product, is a dimension. Dimensions can be organized into hierarchies to define the relationships between the fields in the hierarchies. For example, a Geography hierarchy can contain the Continent, Country, State, and City dimensions. You can also define dimension fields that are not part of a dimension hierarchy.

An attribute is a collection of related objects in a dimension. For example, in the Model dimension, there are attributes for Brand, Brand Type, and Product Name. Attributes are specific to a dimension and are typically more specific than general in nature.

Accessing Data

When your App Studio application accesses data, App Studio needs to know how to interpret the data that it finds. A Master File, which is the primary component of metadata, is a map of the segments in the data source and all of the fields in each segment. The Master File also identifies the name of the data source and the type of data source it is.

For some types of data sources, the Master File is supplemented by an Access File. An Access File includes additional information that completes the description of the data source. For example, it includes the full data source name and location. You require one Master File and, for some data sources, one Access File to describe a data source. These metadata files (Master File and Access File) are referred to as a synonym.

Synonyms are stored separately, apart from the associated data source. Your App Studio application uses a synonym to interpret a data source as follows:

1. It identifies the data sources available and their respective fields.
2. It examines the security rules, if Information Builders data source security (DBA) has been specified for the data source, and ensures that user access is allowed based on any DBA security specified.
3. It identifies the Access File for the data source, if that data source requires an Access File.

The data source content is interpreted based on the information in the Master File and, if applicable, the Access File.

Working With Data Adapters

With the appropriate WebFOCUS Data Adapters, you can access data from many different sources, including the following:

- ❑ Relational data sources, such as DB2, Teradata, Oracle, and Sybase.
- ❑ Hierarchical data sources, such as IMS and FOCUS.
- ❑ Indexed data sources, such as ISAM and VSAM.
- ❑ Network data sources, such as CA-IDMS.
- ❑ Sequential data sources, both fixed-format and delimited format.
- ❑ Multi-dimensional data sources, such as SAP BW and Essbase.
- ❑ XML data sources.

Every adapter is specifically designed for the data source that it accesses, and, as a result, is able to translate between SQL or WebFOCUS and the data management language (DML) of the data source. The adapter manages the communication between the data interface and the data source and returns either answers sets or messages to the requestor. Adapters provide solutions to product variations, including product differences in syntax, functionality, schema, data types, catalogs, data representations, message processing, and answer set retrieval. It is the adapter that manages the synonym creation process.

The parameters required to configure supported adapters and to create synonyms for the corresponding data sources are described in detail in the *Adapter Administration* manual.

Generating a Synonym

Often, a synonym already exists on the server, and reporting can begin at once. However, if the synonym you require does not exist on the server, an authorized server or application administrator can create it directly using the Metadata canvas in App Studio.

To begin creating a synonym, you use the Data Source Definition Wizard, which guides you through the steps that you need to follow to open a recently used synonym, create a new synonym, or edit an existing synonym. You use the Metadata canvas, and the available tab and panels, to develop your synonym. This enables you to explore DBMS catalogs and select the objects for which you wish to create synonyms. The Metadata canvas prompts for the information it needs to create a synonym for a particular data source and stores the generated synonym on the server.

In order to generate a synonym, you must be authorized to use the data against which you plan to report and you must have configured an adapter to access that type of data. When you begin to create a synonym, App Studio opens the Select adapter to configure or Select connection to create synonym window. The option to create the synonym becomes available only after the adapter is successfully configured. For more information on how to configure an adapter in App Studio, see the *Getting Started With WebFOCUS App Studio* manual.

Once you have generated a synonym, you can report against the synonym. In many instances, the configured adapter and the generated synonym are all you need to access your data and create reports and graphs.

However, you may wish to enhance the synonym in order to implement particular capabilities that are supported in the WebFOCUS data description language. To do this, you can use the Metadata canvas.

When you use the Metadata canvas, there is no need to know the data description language. All viewable and editable attributes of the synonym components display. If you make changes to the generated synonym, the Metadata canvas validates your entries and displays messages if they violate the underlying syntax of the data description language.

Note: If you are comfortable working directly with syntax, you can open the synonym components in a text editor. For detailed information about the underlying syntax, see the *Describing Data With WebFOCUS Language* manual.

Enhancing a Synonym

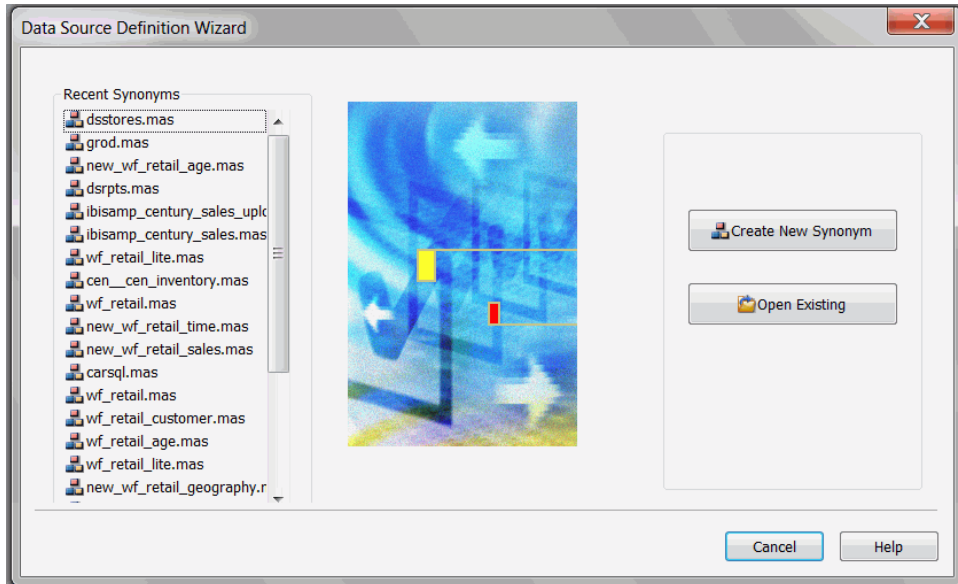
The following are some of the attributes you might want to add to the synonym to enhance your data access and reporting capabilities. You can:

- ❑ Apply security rules for fields and values to ensure that user access is based on Information Builders data source security (DBA) specifications.
- ❑ Add virtual columns (DEFINE fields) and columns for aggregated values (COMPUTE fields).
- ❑ Add filters to specify data selection criteria.
- ❑ Add group definitions for data sources that support groups.
- ❑ Add meaningful titles and descriptions, including multilanguage variations.
- ❑ Change the format of fields (for example, the size of an alphanumeric field or the format of a date field).
- ❑ Create a cluster join view by linking available synonyms to create a multisegment (multitable) file for reporting.
- ❑ Create business views of the metadata in order to limit the fields available to any retrieval request that references the business view and to group fields together based on their roles in an application.
- ❑ Add dimensions for OLAP analysis.
- ❑ Define parent and child hierarchies for cube data sources.

Procedure: How to Access the Metadata Canvas

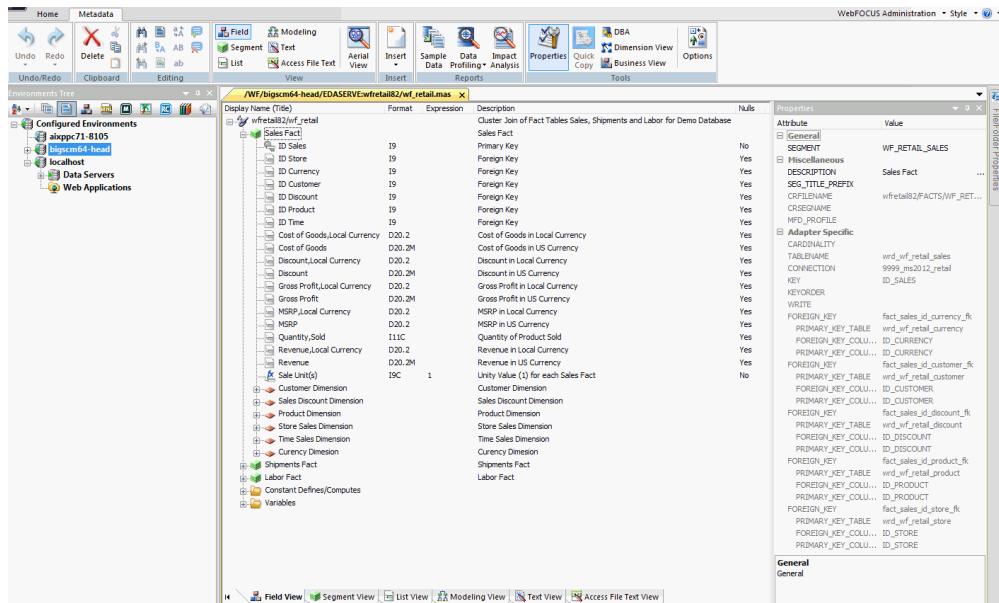
In App Studio, you create new synonyms and edit existing synonyms using the Metadata canvas. You can access the Metadata canvas through the Data command, in the *Content* group, on the *Home* tab.

This launches the Data Source Definition Wizard, where you can open a recently used Master File, create a new Master File, or edit an existing Master File. The Data Source Definition Wizard is shown in the following image.



- ❑ Click *Create New Synonym*, which opens the Select Application pane of the Data Source Wizard. Select a location to create your synonym and click *Finish* to open the Metadata canvas.
- ❑ Click *Open Existing*, which opens the Select Data Source pane of the Data Source Wizard. Select a data source to edit and click *Finish* to open the Metadata canvas.

The Metadata canvas opens, as shown in the following image.

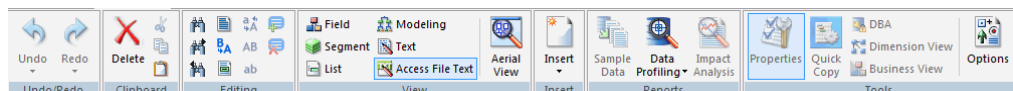


Note: The examples in this document use a multi-fact structure containing multiple Fact tables that have corresponding Dimensions described in the Master File.

Building a Synonym Using the Metadata Tab

The Metadata canvas displays the Metadata tab, which contains all the commands necessary to build your synonym.

The Metadata tab contains groups and commands that provide quick access to commonly performed functions while working in the Metadata canvas. You can use the Metadata tab to undo or redo actions, manipulate selections of data, find and edit text, switch to different view tabs, insert notes, run different reports, and switch between different view modes. The behavior of the command is determined by the selected object. Therefore, certain tab components may be inactive. The Metadata tab is shown in the following image.



Restoring Actions Using the Undo/Redo Group

You can undo and redo actions. The Undo/Redo group is shown in the following image.



The commands are:

Undo

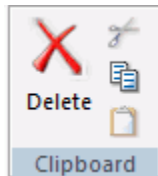
Undoes the last action.

Redo

Restores a previously undone action.

Deleting, Cutting, Copying, and Pasting Using the Clipboard Group

You can delete, cut, copy, and paste sections from the canvas. The Clipboard group is shown in the following image.



The commands are:

Delete

Deletes your selection.

Cut

Cuts your selection.

Copy

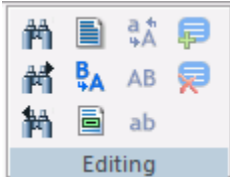
Copies your selection.

Paste

Pastes from your clipboard to the designated area.

Searching and Revising Text Using the Editing Group

You can find specific text, select the entire canvas, replace specific text, move to a specific point in the canvas, apply case formatting to text, and add comments. The Editing group is shown in the following image.



The commands are:

Find

Finds specified text.

Find Next

Finds the next instance of specified text.

Find Previous

Finds the previous instance of specified text.

Select All

Selects the entire canvas.

Replace

Replaces the specified text with different text.

Go To

Moves your view of the canvas to the specified area.

Invert Case

Inverts the case of the selected text.

Upper Case

Upper case the selected text.

Lower Case

Lower case the selected text.

Comment Selection

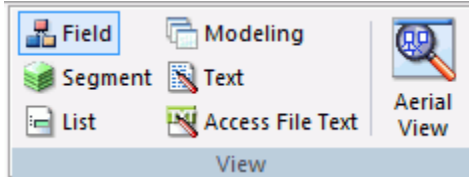
Comment the selected text.

Uncomment Selection

Uncomment the selected text.

Switching Between Views and Aerial View Using the View Group

You can switch between the different views and switch Aerial view on or off. The View group is shown in the following image.



The commands are:

Field

Switches to the Field View. The Field View shows a list of objects on the left, with the attributes and values of the selected item on the right.

Segment

Switches to the Segment View. The Segment View shows the segments that the synonym contains. The Segment View shows a list of objects on the left, with the attributes and values of the selected item on the right.

List

Switches to the List View. The List View shows a list of objects on the left, with the attributes and values of the selected item on the right.

When you right-click a column heading in the List View, a shortcut menu provides options to sort the display based on ascending or descending column values. The display can be sorted by any column.

Modeling

Switches to the Modeling View.

Text

Switches to the Text View tab.

You can print the Master File code by selecting *Print* from the Application menu, perform search operations, and even make changes.

Access File Text

Switches to the Access File Text View tab.

The Access File Text View shows the description of the Access File for a synonym, which is used to access the database.

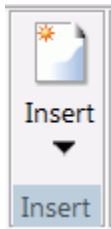
Note: You can print the Access File code by selecting *Print* from the Application menu, performing search operations, and making changes, if necessary.

Aerial View

Switches between showing and hiding Aerial view. This view is only available when in the Modeling View tab.

Inserting Nodes Using the Insert Group

You can insert a node. The Insert group is shown in the following image.



The commands are:

Insert

Enables you to insert one of the following:

Reference to Existing Synonym as Child

The reference is a pointer to the source synonym using the synonym as a child. If you subsequently make changes to the source synonym, reopening the current synonym will reflect those changes.

Reference to Existing Synonym as Root

The reference is a pointer to the source synonym using the synonym as a root. If you subsequently make changes to the source synonym, reopening the current synonym will reflect those changes.

Copy of Existing Synonym

Adds a static copy of an existing synonym to the current synonym. If you subsequently make changes to the source synonym, the current synonym will not reflect those changes.

Segment via Metadata Import

Enables you to create and add a new synonym to the current synonym using the Create Synonym dialog box.

Segment Manually

Adds a synonym that must be coded manually.

DBA

Adds DBA security to the segment.

Field

Adds a general column to the segment.

Define

Adds a virtual or defined column to the segment.

Filter

Adds a filter to the segment.

Compute

Adds a calculated value to the file.

Sort Object

Adds a Sort Objects folder and a sort object. This option is available only if *Support extended options* is selected.

Variable

Adds a Variables folder and a variable to the segment.

Style

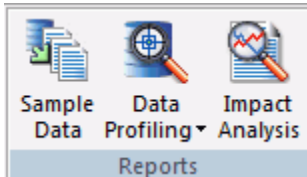
Adds a Styles folder and a style object. This option is available only if *Support extended options* is selected.

Subquery

Adds a subquery to the fields list.

Running a Sample Data, Data Profiling, or Impact Analysis Report Using the Reports Group

You can run a Sample Data report, Data Profiling report, or Impact Analysis report. The Reports group is shown in the following image.



The commands are:

Sample Data

Enables you to view and refresh sample data for the selected segment or synonym.

Data Profiling

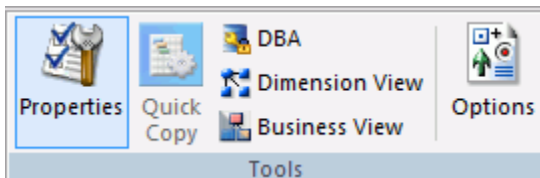
Runs a Data Profiling report, which provides the data characteristics for synonym columns. The Statistics, Count, and Key Analysis options are available.

Impact Analysis

Runs an Impact Analysis report for the particular column in the workspace. An Impact Analysis report identifies the procedures that access a Master File or column within a Master File.

Showing Properties, Data Flow, and View Panels Using the Tools Group

You can switch between showing or hiding the Properties, DBA, Dimension Builder, and Business View panels. You can also recreate the default Dimension View and Business View structure and edit the user options. The Tools group is shown in the following image.



The commands are:

Properties

Switches between showing and hiding the Properties panel.

Quick Copy

Generates a simple Data Flow without using the Data Flow designer. For the selected tables, all rows and columns are copied to new tables.

Although no transformations or where conditions are generated, the Data Flow can still be opened as such and additional criteria can be added.

DBA

Switches between showing and hiding the DBA panel.

Dimension View

Switches between showing and hiding the Dimension View panel. Enables a parent and child hierarchy in Dimension View.

Business View

Switches between showing and hiding the Business View panel. Enables you to create a Business View and a custom Master File that can use selected columns from the original synonym. In addition, you can customize field names, titles, and descriptions.

Options

Allows you to edit the user options. When you click *Options* from the Tools Group, the Options dialog box appears. It enables you to set preferences and customize the look of the Metadata canvas.

Setting Preferences for the Metadata Canvas Using the Options Dialog Box

Click the *Options* button in the *Tools* group to open the Options dialog box.

Reference: Synonym Editor Options Settings

When you click *Options* from the Tools group, the options dialog box appears. It enables you to set preferences and customize the look of the Metadata Canvas.

The Synonym Editor settings page has the following fields and options:

Use application directory name with synonym

If this check box is selected, an application directory name is used when you select a synonym name for both referencing an existing synonym and a transformation with db_lookup.

Undo/Redo Limit

Specifies the maximum number of undo and redo operations allowed in the Synonym Editor.

Support extended options

If this check box is selected, both the Sort objects and Styles folders appear when you edit a synonym.

Enable insert copy of existing synonym

If this check box is selected, this option will be available in the shortcut menu when a synonym or segment name is selected.

Insert child segment with snowflakes

Inserts a reference to the selected table and any tables that the base synonym references through foreign keys.

Automatically arrange segments/folders in Modeling View

If you select or drag multiple or individual tables while in Modeling View, they will be automatically arranged for you.

Show parent segments in Join Editor

If this check box is selected, it controls whether or not columns in parent segments are displayed in the Join Editor for a cluster join or a synonym that references or includes, other synonyms.

Automatically detect entry segment**NEED DEFINITION****Default Join Type**

Sets the default Join type.

- ☐ **Unique.** This join indicates a single instance (one-to-one) type of join. At run time, each host record has, at most, one matching record in the cross-referenced file. This value is the default.
- ☐ **Multiple.** This join indicates a multiple instance (one-to-many) type of join. At run time, each host record can have many matching records in the cross-referenced file.

Auto Calculate Missing

Allows you to adjust the MISSING attribute.

- ☐ **Prompt.** Prompts before adjusting the MISSING attribute.
- ☐ **ON.** Adjusts the MISSING attribute without prompting.

- ☐ **OFF.** Does not adjust the MISSING attribute.

Modeling View Line Colors

Allows you to set colors for connector lines in the Modeling View.

Default. Changes the color lines in the Modeling View.

Highlighted. Changes the color of the highlighted lines in the Modeling View.

No keys. Changes the color of lines with no keys in the modeling view.

Reset Colors

Restores the default colors.

Reference: Synonym Editor Format Options Settings

The Format pane is available from the Options dialog box. To open the Options dialog box, select *Options* from the Tools group. Expand the *General* node, and select *Format*.

The Fonts section has the following fields and options:

Category

Allows you to set the font for text in the process flow workspace, reports, text views, and log views.

Font

Launches a dialog box for specifying font settings.

Reset Font to Defaults

Restores the default fonts.

Reference: Synonym Editor Column Management Settings

The Column Management pane is available from the Options dialog box. To open the Options dialog box, select *Options* from the Tools group. Expand the *General* node, and select *Column Management*.

Column Management user preferences enable you to choose which columns to display on the grids for transformations, column selection, joins, and sorts. You can also set the column display order. The settings apply to all column-related dialog boxes.

The Column Management pane has the following fields and options:

Customize column display

Lists the column-related dialog boxes that can be customized. Expanding a folder will display check boxes that can be used to add columns to each dialog box.

Reset to default

Restores the default values.

Column name display strategy

Controls the information that appears in trees and grids. The available options are Name, Title, Description, and Alias. If no Title, Description, or Alias exists, the display will default to the Name.

Note: It is recommended that you use Title when working with Business Views.

Use segment to qualify field reference

Indicates whether to qualify field names with the segment name in which they reside for duplicate field names only or always.

Expand any of the available Customize column display options to see default settings. Not all columns are on every grid. The following columns can be added:

Alias

Assigns an alternative name for a column or the real column name for a DBMS synonym.

Application

Indicates the application where the synonym resides.

Belongs To Segment

Shows the parent segment in the base synonym.

Connection

Indicates the adapter connection name used.

Data Origin

Indicates the date the synonym was created.

Date Modified

Indicates when the synonym was last modified.

Description

Is a description or comments about the column.

Expression

Is the expression for the column.

Extension

Indicates the suffix (data source type) of the synonym.

Field Type

Indicates that a column is an index (I) or is read-only.

Format

Is the type and length of a column data as stored.

Function

Indicates the name of the function.

Geographic Role

Describes the geographic role of the column.

Has Foreign Keys

Indicates that the synonym includes foreign keys.

Index

Indicates an index column.

Join Condition

Indicates the condition for the join.

Join Parent

Indicates the parent of the join.

Join Status

Out of the candidate list, indicates the strongest candidate or candidates for insertion.

Join Strategy

Indicates the strategy for the join.

Join To

Indicates whether you can join to the column.

Keys

Indicates the keys in the synonym.

Length

Is the column length.

Name

Indicates the column name.

Nulls

Indicates whether or not the column can contain null data.

Number of Segments

Indicates the number of segments in the synonym.

Order

Indicates the order of the column in the segment.

Parent(s)

Indicates the parent or parents on the active Metadata canvas.

Prefix

Indicates a prefix for the column.

Primary Key Tables

Indicates the primary key for the synonym.

Property

Indicates whether the column is an attribute or a measure.

Real Table Name

Indicates the actual name of the table or the physical file name.

Reference

Indicate a reference for the column to an index column.

Scale

Is the maximum number of digits to the right of the decimal.

SCD Type

Used for processing slowly changing dimensions.

Segment

Indicates the segment name.

Sequence Number in Key

Indicates the sequence number of the field within the key.

Size

Indicates the size of the synonym.

Source

Indicates the source of the synonym.

SQL Conversion Notes

Indicates how SQL is converted.

Table

Is the synonym that contains the column.

Title

Supplies a title to replace the column name normally used in reports.

Type

Is the type of object in an application directory.

Reference: Synonym Editor Run Options Settings

Run Options user preferences include determining the number of rows and columns to retrieve, as well as the default format when sampling data.

The Run Options settings pane has the following fields and options:

Maximum number of rows for test reports

Sets the number of rows retrieved to produce sample data when testing transformations or SQL. The default is 50.

Maximum number of columns for test reports

Sets the number of columns retrieved to produce sample data when testing transformations or SQL. The default is to retrieve all columns (with a highest value setting of 999999).

Test reports default format

Sets the format of reports for retrieving sample data when testing transformations or SQL. The default is Default. The following report formats are available:

- ☐ **Default.** Formats numeric and date columns based on edit options in the synonym.
- ☐ **HTML.** Produces the report in HTML format.
- ☐ **HTML - plain text.** Produces the report in plain text format.
- ☐ **active report.** Produces an HTML active report designed for offline analysis.
- ☐ **Excel.** Produces the report in Excel format.
- ☐ **PDF.** Produces the report in PDF format.
- ☐ **Unformatted.** Does not apply formatting to numeric and date columns.

Stop after DBMS error

Sets the number of DBMS-related errors allowed before the server stops running the procedure.

Changing Views in the Metadata Canvas

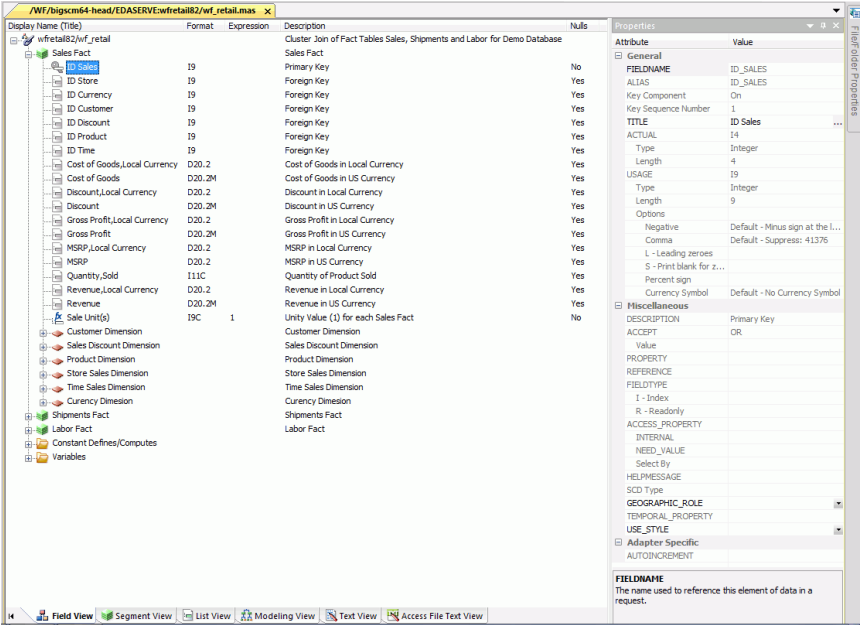
The Metadata canvas displays Field View, Segment View, Modeling View, Text View, and Access File Text View tabs. You can switch to different views in the Metadata canvas to edit different aspects of your data source more efficiently.

Displaying Fields in a Synonym Using the Field View Tab

The Field View tab is accessible when you are creating or editing a synonym. From this tab, you can see a table with all available fields. As shown in the following image, the Field View tab shows a hierarchy of segments and columns on the left, with the attributes and values of the selected item in the Properties window, which displays, by default, on the right side of the canvas. This is the default view tab when you are creating or editing a synonym. The Properties panel can be resized, positioned in different areas, or hidden.

Note: The attributes available depend on the type of synonym.

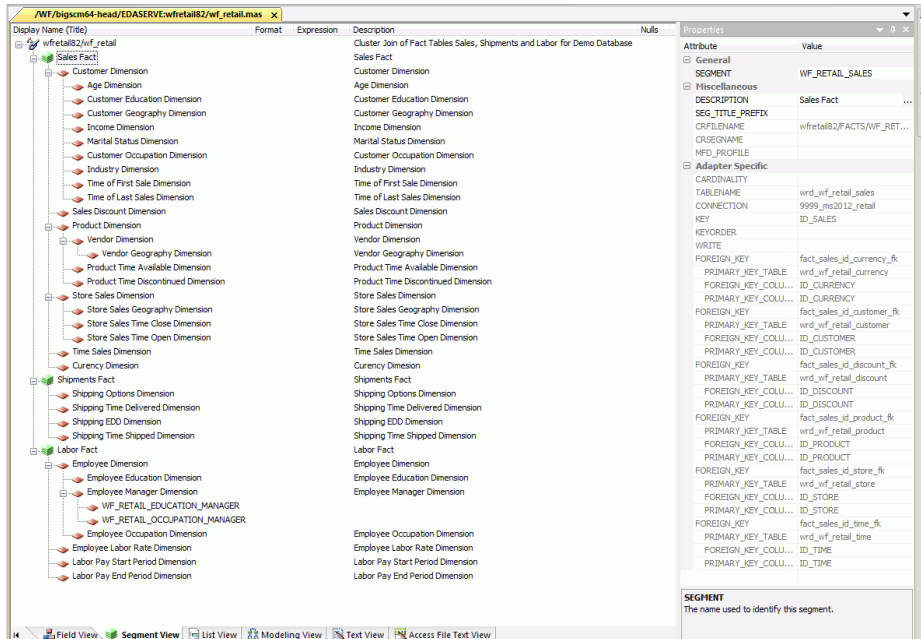
The following image is an example of a multi-fact structure with a key column selected.



Note: Information about the attribute that has focus is displayed at the bottom of the attribute list. In this case, an explanation of the FIELDNAME attribute appears.

Displaying Segments in a Synonym Using the Segment View Tab

The Segment View tab is accessible when you are creating or editing a synonym. As shown in the following image, the Segment View tab shows a hierarchy of segments that the synonym contains on the left, with the attributes and values of the selected item in the Properties window, which displays, by default, on the right side of the canvas. The Properties panel can be resized, positioned in different areas, or hidden.



Note: Information about the attribute that has focus is displayed at the bottom of the attribute list. In this case, an explanation of the SEGMENT attribute appears.

Reference: Segment Shortcut Menu

When you right-click a segment in the Metadata canvas, the following options are available:

Properties

Opens a pane showing the properties of the selected segment.

Insert

Enables you to insert one of the following:

Reference to Existing Synonym as Child

The reference is a pointer to the source synonym using the synonym as a child. If you subsequently make changes to the source synonym, reopening the current synonym will reflect those changes.

Reference to Existing Synonym as Root

The reference is a pointer to the source synonym using the synonym as a root. If you subsequently make changes to the source synonym, reopening the current synonym will reflect those changes.

Copy of Existing Synonym

Adds a static copy of an existing synonym to the current synonym. If you subsequently make changes to the source synonym, the current synonym will not reflect those changes.

Segment via Metadata Import

Enables you to create and add a new synonym to the current synonym using the Create Synonym dialog box.

Segment Manually

Adds a synonym that must be coded manually.

Field

Adds a general column to the segment.

Define

Adds a virtual or defined column to the segment.

Filter

Adds a filter to the segment.

Compute

Adds a calculated value to the file.

Sort Object

Adds a Sort Objects folder and a sort object. This option is available only if *Support extended options* is selected.

Variable

Adds a Variables folder and a variable to the segment.

Style

Adds a Styles folder and a style object. This option is available only if *Support extended options* is selected.

Subquery

Adds a subquery to the fields list.

Add/Remove Parent Links

If applicable, enables you to add or remove segments in the current cluster synonym.

Data Profiling

Provides the characteristics of the data for a segment. The following options are available:

Statistics

Shows statistic values for the selected segment only.

Count

Shows a count of the number of rows in the selected source table. For a multi-segment synonym, it shows the count for each segment.

Statistics with parent segment

This option is available only when viewing a lower segment of a hierarchy (cluster join).

Key Analysis

Allows you to select the columns that you would like to analyze as potential keys to the source table.

Values

Shows unique values and their percentages.

Duplicate Values

Shows identical values and their percentages.

Sample Data

Displays sample data in the workspace for the selected segment or synonym.

Sample Data with parent key

Displays sample data for the selected segment joined to the parent segment. This option is only available when a child segment is selected in a multi segment synonym.

Delete

Deletes the segment.

Rename

Allows you to rename the segment.

Edit All Properties

Allows you to edit adapter specific properties, such as the delimiter value in a delimited flat file.

Open Base Synonym

Opens the base synonym for the current synonym.

Edit Parent Links

Indicates the parent segment or segments of the selected child that you can edit.

Reference: Column/Field Shortcut Menu

When you right-click a column in the Metadata canvas, the following options are available.

Note: If you multi-select columns and right-click them, an abridged version of the shortcut menu opens.

Properties

Opens a pane showing the properties of the selected column.

Insert

Enables you to insert one of the following:

Field

Adds a general column to the synonym.

Define

Adds a virtual or defined column to the synonym.

Filter

Adds a filter to the segment.

Filter (New)

Adds a filter to the segment using the Advanced Filter dialog box.

Compute

Adds a calculated value to the file.

Group

Indicates the name used to reference the element of data (group of columns) in a request.

Sort Object

Adds a Sort Objects folder and a sort object. This option is available only if *Support extended options* is selected and is not used with DataMigrator.

Variable

Adds a Variables Folder if needed an a variable.

Style

Adds a Styles folder and a style object. This option is available only if *Support extended options* is selected and is not used with DataMigrator.

Subquery

Adds a subquery to the fields list.

Impact Analysis

Displays an Impact Analysis report for the particular column in the workspace. An Impact Analysis report identifies the procedures that access a Master File or field within a Master File.

Data Profiling

Provides the characteristics of the data for a column.

Statistics

Shows statistic values for the selected segment only.

Patterns

Shows a patterns report for the selected column.

Hex View

Shows the Hexadecimal value of the selected field.

Values

Shows a values report for the selected column.

Values Graph

Displays a graph for both alpha and numeric field types.

Values Pie Graph

Displays a pie graph.

Duplicate Values

Shows identical values and their percents.

Outliers

Shows outlier report for the selected column.

Sample Data

Displays sample data in the workspace.

Delete

Deletes the column.

Rename

Allows you to rename the column.

Displaying Fields and Properties in a Synonym Using the List View Tab

The List View tab is accessible when you are creating or editing a synonym. As shown in the following image, the List View tab shows the fields and properties displayed next to their name, with the attributes and values of the selected item in the Properties panel, which displays, by default, on the right side of the canvas. The Properties panel can be resized, positioned in different areas, or hidden. The List View tab is accessible when you are creating or editing a synonym.

Name	Format	Expression	Description	Nulls
ID Sales	I9		Primary Key	No
ID Store	I9		Foreign Key	Yes
ID Currency	I9		Foreign Key	Yes
ID Customer	I9		Foreign Key	Yes
ID Discount	I9		Foreign Key	Yes
ID Product	I9		Foreign Key	Yes
ID Time	I9		Foreign Key	Yes
Cost of Goods,Local Currency	D20.2		Cost of Goods in Local Currency	Yes
Cost of Goods	D20.2M		Cost of Goods in US Currency	Yes
Discount,Local Currency	D20.2		Discount in Local Currency	Yes
Discount	D20.2M		Discount in US Currency	Yes
Gross Profit,Local Currency	D20.2		Gross Profit in Local Currency	Yes
Gross Profit	D20.2M		Gross Profit in US Currency	Yes
MSRP,Local Currency	D20.2		MSRP in Local Currency	Yes
MSRP	D20.2		MSRP in US Currency	Yes
Quantity,Sold	I11C		Quantity of Product Sold	Yes
Revenue,Local Currency	D20.2		Revenue in Local Currency	Yes
Revenue	D20.2M		Revenue in US Currency	Yes
Sale Unit(s)	I9C	1	Unity Value (1) for each Sales Fact	No
ID Customer	I9		Primary Key	Yes*
ID Age	I9		Foreign Key	Yes
ID Education	I9		Foreign Key	Yes
ID Geography	I9		Foreign Key	Yes
ID Income	I9		Foreign Key	Yes
ID Industry	I9		Foreign Key	Yes
ID Marital,Status	I9		Foreign Key	Yes
ID Occupation	I9		Foreign Key	Yes
ID Time Min	I9		Foreign Key	Yes
ID Time Max	I9		Foreign Key	Yes
Email,Address	A60V		Customer Email Address	Yes
First,Name	A20V		Customer First Name	Yes

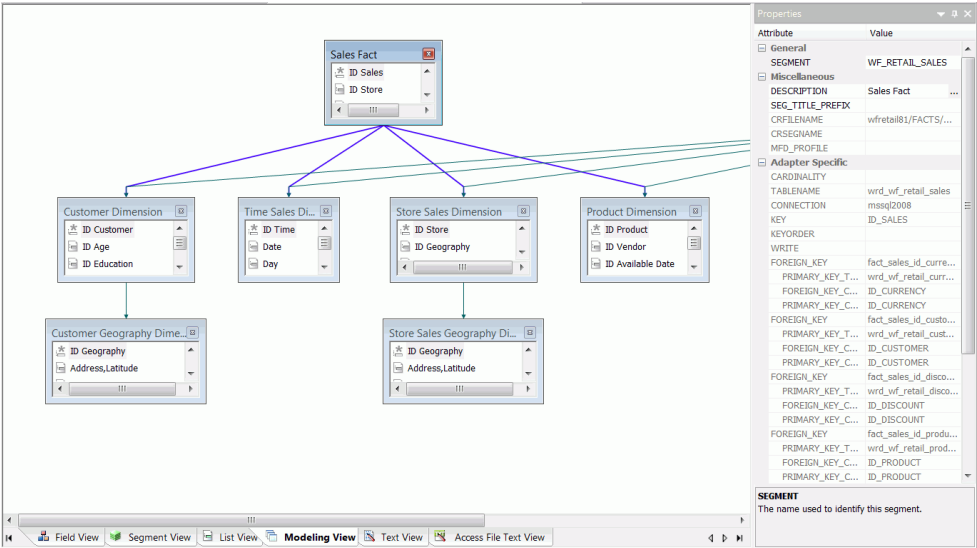
Properties

Attribute	Value
General	
FIELDNAME	ID_SALES
ALIAS	ID_SALES
MISSING	
Key Component	On
Key Sequence Num...	1
TITLE	ID Sales ...
ACTUAL	I4
Type	Integer
Length	4
USAGE	I9
Type	Integer
Length	9
Options	
Negative	Default - Minus sig...
Comma	Default - Suppress...
L - Leading ze...	
S - Print blan...	
% - Percent s...	
Currency Sym...	Default - No Curre...
Miscellaneous	
DESCRIPTION	Primary Key
ACCEPT	OR
Value	
PROPERTY	
REFERENCE	
FIELDTYPE	
I - Index	
R - Readonly	
ACCESS_PROPERTY	
INTERNAL	
NEED_VALUE	
Select By	
FIELDNAME	
The name used to reference this element of data in a request.	

Note: Information about the attribute that has focus is displayed at the bottom of the attribute list. In this case, an explanation of the FIELDNAME attribute appears.

Showing a Graphical Representation of a Synonym Using the Modeling View Tab

The Modeling View tab is accessible when you are creating or editing a synonym. As shown in the following image, the Modeling View tab shows a graphical representation of the synonym. You can use the Modeling View tab to define dimensions for OLAP analysis, view join properties, create cluster joins, and add or edit segments. The following image shows the Sales Dimension of a multi-fact data source.



Reference: Modeling View Shortcut Menu

When you right-click a synonym or segment in the Metadata canvas Modeling View tab, the following options are available:

Collapse/Expand

Changes the view from a file icon to a table view, which enables you to see columns, sample data, and sample data parent keys.

Tip: You may also double-click a file icon to open the table view. Double-click the table to close the table view, or click the X button from the toggle toolbar to close.

Properties

Opens a pane showing the properties of the selected segment.

Insert

- ☐ **Reference to Existing Synonym as Child.** Enables you to reference an existing synonym using the synonym as a child.
- ☐ **Reference to Existing Synonym as Root.** Enables you to reference an existing synonym using the synonym as a root.
- ☐ **Segment via Metadata Import.** Enables you to create a new synonym through the Create Synonym tool and add it to the current synonym.
- ☐ **Segment Manually.** Inserts a segment to the current synonym, that must be coded manually.

Data Profiling

Provides the characteristics of the data for a segment.

Sample Data

Displays sample data in the workspace.

Sample Data with parent key

Displays sample data with parent key in the workspace.

Delete

Deletes the segment.

Rename

Enables you to rename the segment.

Displaying the Contents of a Master File Using the Text View Tab

The Text View tab is accessible when you are creating or editing a synonym. The Text View tab shows the Master File of the underlying table in a text editor. You can print the Master File syntax by selecting *Print* from the Application Menu.

The following image is an example of a multi-fact structure in the Text View tab.

```

1  $Copyright (c) Information Builders, Inc. All rights reserved. @MFSM_NOPROLOG@ $
2  FILENAME=WF_RETAIL, TRANS_FILE=_EDAHOME/NLS/dt,
3  REMARKS='Cluster Join of Fact Tables Sales, Shipments and Labor for Demo Database', $
4  SEGMENT=WF_RETAIL_SALES, CRFILE=wfretail81/FACTS/WF_RETAIL_SALES, CRINCLUDE=ALL,
5  DESCRIPTION='Sales Fact', $
6  FIELDNAME=ID_SALES,
7  WITHIN='*Hierarchy12', $
8  FIELDNAME=COGS_LOCAL,
9  PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
10 FIELDNAME=COGS_US,
11 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
12 FIELDNAME=DISCOUNT_LOCAL,
13 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
14 FIELDNAME=DISCOUNT_US,
15 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
16 FIELDNAME=GROSS_PROFIT_LOCAL,
17 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
18 FIELDNAME=GROSS_PROFIT_US,
19 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
20 FIELDNAME=MSRP_LOCAL,
21 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
22 FIELDNAME=MSRP_US,
23 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
24 FIELDNAME=QUANTITY_SOLD,
25 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
26 FIELDNAME=REVENUE_LOCAL,
27 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
28 FIELDNAME=REVENUE_US,
29 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP1, $
30 DEFINE SALE_UNITY/19C WITH WF_RETAIL_SALES.ID_SALES=1;
31 TITLE='Sale Unit(s)', DESCRIPTION='Unity Value (1) for each Sales Fact', MEASURE_GROUP=MEASGRP1,
32 PROPERTY=MEASURE, $
33 SEGMENT=WF_RETAIL_SHIPMENTS, PARENT=, CRFILE=wfretail81/FACTS/WF_RETAIL_SHIPMENTS, CRINCLUDE=ALL,
34 DESCRIPTION='Shipments Fact', $
35 FIELDNAME=ID_SHIPFACT,
36 WITHIN='*Hierarchy17', $
37 FIELDNAME=DAYSDELAYED,
38 PROPERTY=MEASURE, MEASURE_GROUP=MEASGRP2, $

```

Displaying the Contents of an Access File Using the Access File Text View Tab

The Access File Text View tab is accessible when you are creating or editing a synonym. The Access File Text View tab shows the Access File for a synonym, which is used to access the data source. You can print the Access File syntax by selecting *Print* from the Application Menu.

The following image shows an example of an SQL data source in the Access File Text View tab.

```

1 SEGNAME=WF_RETAIL_SALES,
2 TABLENAME=wrld_wf_retail_sales,
3 CONNECTION=mssql2008,
4 KEY=ID_SALES, $
5 FOREIGN_KEY=fact_sales_id_currency_fk,
6 PRIMARY_KEY_TABLE=wrld_wf_retail_currency,
7 FOREIGN_KEY_COLUMN=ID_CURRENCY,
8 PRIMARY_KEY_COLUMN=ID_CURRENCY, $
9 FOREIGN_KEY=fact_sales_id_customer_fk,
10 PRIMARY_KEY_TABLE=wrld_wf_retail_customer,
11 FOREIGN_KEY_COLUMN=ID_CUSTOMER,
12 PRIMARY_KEY_COLUMN=ID_CUSTOMER, $
13 FOREIGN_KEY=fact_sales_id_discount_fk,
14 PRIMARY_KEY_TABLE=wrld_wf_retail_discount,
15 FOREIGN_KEY_COLUMN=ID_DISCOUNT,
16 PRIMARY_KEY_COLUMN=ID_DISCOUNT, $
17 FOREIGN_KEY=fact_sales_id_product_fk,
18 PRIMARY_KEY_TABLE=wrld_wf_retail_product,
19 FOREIGN_KEY_COLUMN=ID_PRODUCT,
20 PRIMARY_KEY_COLUMN=ID_PRODUCT, $
21 FOREIGN_KEY=fact_sales_id_store_fk,
22 PRIMARY_KEY_TABLE=wrld_wf_retail_store,
23 FOREIGN_KEY_COLUMN=ID_STORE,
24 PRIMARY_KEY_COLUMN=ID_STORE, $
25 FOREIGN_KEY=fact_sales_id_time_fk,
26 PRIMARY_KEY_TABLE=wrld_wf_retail_time,
27 FOREIGN_KEY_COLUMN=ID_TIME,
28 PRIMARY_KEY_COLUMN=ID_TIME, $

```

Note: The text views are read-only. You cannot edit the underlying description from these tabs. However, you can right-click a synonym from the navigation pane and click *Edit in Windows Associated Tool* (for relational synonyms).

Viewing and Editing Synonym Attributes

The Metadata canvas enables you to view and edit the attributes of a synonym.

Procedure: How to View and Edit Synonym Attributes

To view and edit synonym attributes:

1. Double-click a synonym, or right-click it and click *Open*.

The Metadata canvas opens to the Field View tab, which shows a hierarchy of segments and columns on the left, with the attributes and values of the selected item on the right.

The attributes available depend on the type of synonym.

The values for Display Name (Title), Format, Expression, Description, and Nulls are viewable in the hierarchy with the columns. To edit these values, use the corresponding attribute fields in the Properties panel on the right-hand side of the Metadata canvas.

2. You can change the attribute values by typing in new values or by using the drop-down menus and check boxes.

The Properties panel does not let you make any changes that would render the synonym unusable. Therefore, you cannot edit any value field that is highlighted gray. In addition, if a change does not have proper syntax or format applied, the field may appear in red text. Messages and warnings appear if you try to save a file that contains an error.

3. Save changes by clicking Save from the Quick Access Toolbar.

Note: You can multi-select fields to change attributes for multiple fields in a single operation. The display changes to show only those attributes that can be changed.

4. Close the Metadata canvas by clicking the X.

Note: If you close the Metadata canvas without saving your changes, you are prompted to do so.

Reference: File Attributes Summary

Synonyms can have the following file attributes:

General

SUFFIX

Identifies the type of synonym or data source.

MFD_PROFILE

Identifies the name of the FOCEXEC that will be executed before running a request based on the Master File.

FDFCENT

Defines the default century value, specifying a century number for handling cross-century dates.

Note: Use the default setting (0) unless you wish to retrieve data from a earlier century (for example, 19xx).

FYRTHRESH

Defines the base years, to represent the lowest year to which the century value applies (FDFCENT).

Note: Use the default setting (0) unless you wish to retrieve data from a earlier century (for example, 19xx).

REMARKS

Enables you to include descriptive information at the file level and specify multiple language descriptions for the synonym. Remarks are displayed along with the file name during reporting.

DATASET

Identifies the location of the data source to be used in the file name, including the extension and the location of the data file.

Note: The attributes available depend on the type of synonym.

Codepage

CODEPAGE

Defines the language to use for the synonym.

Note: Information about the attribute that has focus is displayed at the bottom of the attribute list. In this case, an explanation of the REMARKS attribute appears.

Reference: Segment Attributes Summary

If a synonym segment is selected, the attributes listed below are available.

Note: Information about the attribute that has focus is displayed at the bottom of the attribute list.

General

SEGMENT

Is the name of the segment.

ENCRYPT

Check this box to scramble field values in the current segment in order to protect it from unauthorized examination.

SEGTYPE

Specifies the type of relationship that a segment has to its parent, and indicates which of the segment fields are key fields and in what order they are sorted.

Type. Identify the segment type and sorting options from the Type drop-down list.

Keys. Records are sorted in a data source by key fields. Enter the names of key fields that you want to use for sorting. For example, no two employees can have the same employee ID number, so you can use that field as the key. A segment instance can have more than one field that makes up the key. That is, two or more field values may be used to distinguish records.

Miscellaneous

SEGSUF

SEGSUF is used when part of the data source being described by the synonym is of a different data source type than that declared for the entire structure.

DESCRIPTION

Contains a description or comments about the segment.

SEG_TITLE_PREFIX

An optional attribute that enables you to provide the title prefix for the segment fields that appear in reports. You can split the text across up to five separate title lines by separating the lines with a comma.

CRFILENAME

Is the name of the cross-referenced data source.

CRSEGNAME

Is the name of the cross-referenced segment.

CRKEY

Identifies the common join field for the cross-referenced segment.

Note: These cross-referenced values (CRFilename, CRSegname, CRKey) are available for WebFOCUS data sources.

OCCURS

Describes repeating fields or groups of fields in a data source. OCCURS can be based on an integer value showing the number of occurrences (from 1 to 4095), a field name, which names a field in the parent segment or a virtual field in an ancestor segment whose integer value contains the number of occurrences of the descendant segment, or a variable, which indicates that the number of occurrences varies from record to record.

POSITION

Specifies the name of the field in the parent segment that specifies the starting position and overall length of the multiply occurring fields.

Adapter Specific

Adapter Specific fields are shown if an Access File component has been generated with the synonym.

CARDINALITY

Defines how many members of a dimension can be retrieved for a report.

TABlename

Identifies the table or view. It may contain the owner ID, as well as the table name. For some synonyms, it must also contain the data source name. This value may be a variable.

CONNECTION

Indicates the host server or data source for synonyms. This value may be a variable.

KEY

Identifies the names of the columns that constitute the primary key.

KEYORDER

Identifies the logical sort sequence of data by the primary key.

WRITE

Specifies whether write operations are allowed against the table.

FOREIGN_KEY

Specifies the type of table persistence and related table properties. This is optional for database management systems that support volatile tables, and required otherwise.

DBSPACE

Identifies the storage area in which the table resides.

PERSISTENCE

Specifies the type of table persistence and related table properties. This is optional for database management systems that support volatile tables, and required otherwise.

Note: The attributes available depend on the type of synonym.

Reference: Column/Field Attribute Summary

If a column or field in a synonym is selected, the attributes listed below are available. The available attributes depend on the type of synonym. Information about the attribute that has focus is displayed at the bottom of the attribute list.

General

FIELDNAME

Is the name of the column.

ALIAS

Assigns an alternative name for a column, or the real column name for a DBMS synonym.

For file data sources, a special reserved ALIAS of INSTANCE means the associated FIELD will show the name of the file when it is read.

When a FIELDNAME of RECTYPE is used the ALIAS contains the value that identifies the record type.

KEY COMPONENT

Indicates whether the field is part of the primary key for the table.

KEY SEQUENCE NUMBER

Indicates the sequence number of the field in the primary key for the table.

MISSING

Controls how null data is handled, that is, if no transaction value is supplied.

TITLE

Supplies a title to replace the column name that is normally used in reports and enables you to specify multiple language titles for the column or field.

ACTUAL

Describes the type and length of data as it is actually stored in the data source.

USAGE

Describes the data type and format for the column for usage or display.

Note: Additional attributes, DEFCENT and YRTHRESH, are available if the Usage field is set to Date, Time, or DateTime (Timestamp) format. Use these attributes to enter the century and year threshold values for the column or field.

Miscellaneous**DESCRIPTION**

Contains a description or comments about the column or field.

ACCEPT

Specifies criteria for validating data.

- ☐ **OR** enables you to specify an acceptable value.
- ☐ **SYNONYM** enables you to specify a synonym as the source of the accept list.
- ☐ **FOCEXEC** enables you to specify a FOCEXEC as the source of the accept list.
- ☐ **FROM-TO** enables you to specify a range of acceptable value fields.
- ☐ **FIND** enables you to supply file and field names to instruct where to search for a data source and for a list of acceptable values. You supply the field name of the data field for which the validation criteria are being assigned, the file name of the target WebFOCUS data source where the field can be found, and the field name of the target data field that contains the validation criteria.

FIND is only available for WebFOCUS data sources and does not apply to OLAP-enabled synonyms. Also note that, in the Maintain environment, FIND is not supported when developing a synonym.

WITHIN

Contains the name of a field to be included in a dimension.

PROPERTY

Describes which hierarchy property the column represents.

REFERENCE

Points to the field that is the unique identifier for the hierarchy.

FIELDTYPE

- ☐ **I - Index** identifies an indexed column in a WebFOCUS data source.
- ☐ **R - Readonly** indicates a read-only column. This setting is useful for columns that are automatically assigned a value by the RDBMS.

ACCESS_PROPERTY

Specifies access options for the column data.

- ☐ **INTERNAL** defines a column that does not appear in sample data or in the list of available columns. Restricts the field from showing in any of the field Lists in the reporting tools.
- ☐ **NEED_VALUE** defines a column that requires a value to access the data.
- ☐ **Select By** defines a column by value, range, or multi-values.
- ☐ **AUTHRESP** defines a column that describes the result of an authentication operation. Correct response values must be provided in the ACCEPT attribute (using the OR predicate if more than one value is acceptable).
- ☐ **AUTHTOKEN** defines a column that contains a response token to be passed as an input value to the operation to be executed.

HELPMESSAGE

Appends a help message to a column.

This attribute is not used by WebFOCUS.

GEOGRAPHIC_ROLE

Describes the geographic role of the column.

TEMPORAL_PROPERTY

Inserts virtual fields in the Master File to show how selected totals progressed through a time period for specified intervals.

USE_STYLE

Are the styles (for example, font and color) to apply to the field.

The attributes available depend on the type of synonym.

Adapter Specific**AUTOINCREMENT**

Indicates that the field is automatically incremented by the relational database when rows are inserted. This option is only available for selected relational databases. When selected, the field must also be identified with a field type of read-only.

The following attributes are only used if AUTOINCREMENT is checked.

- ☐ **START.** Indicates the starting value for this AUTOINCREMENT field. If not specified, 1 is used.
- ☐ **INCREMENT.** Indicates the increment value for this field. If not specified, 1 is used.
- ☐ **SEQUENCE.** Is the name of the corresponding database SEQUENCE object for this field. This option is only available for ORACLE tables.

Setting Up Multilingual Titles and Descriptions

You can open a synonym in the Metadata canvas and provide text for the title, caption, and description in multiple languages. These descriptions appear in the specified language in reports generated against the synonym.

The Multilingual Titles dialog box is available from the Remarks, Title, and Description attribute value fields in the Metadata canvas.

Note: The attributes available depend on the type of synonym.

Procedure: How to Set Up Multilingual Titles and Descriptions

1. From the Projects or Data Servers area, double-click the Master File.
The Master File opens to the Field View tab in the Metadata canvas.
2. To add multilingual text:
 - ☐ For *Remarks*, click the root level of the Master File (application/filename) on the left.
 - ☐ For *Title*, click a column from the Master File hierarchy of columns on the left.
 - ☐ For *Descriptions*, click a column, segment, or custom field from the Master File hierarchy of fields on the left.

The corresponding attributes and values appear on the right.

3. Click the browse (...) button at the end of the value field for either Remarks, Title, or Description.

The Multilingual dialog box opens.

4. From the Specify for different languages drop-down list, choose the language in which you want the titles or remarks (descriptions) to be displayed.
5. Click *Add*.

The selected language is added below the default language (which is determined by your code page selection).

6. Type a description or title in the Text field.
7. You may add, edit, or delete additional titles or descriptions.

To add an additional language:

- a. Select another language from the drop-down list.
- b. Click *Add*.
- c. Type a title or description for the field.

To edit an existing specified title or description:

- a. Select the title or description and click *Edit*.

You may also double-click the title.

- b. Manually type a title or description name.

To delete a specified title:

- a. Select the title or description and language to be deleted.
- b. Click *Delete*.

8. Click *OK* to close the Multilingual Remarks dialog box.
9. Click *Save* from the File menu to save the synonym.

Viewing Data Profiling Characteristics

Data Profiling provides data characteristics for the columns in a synonym. You can display the characteristics for all the columns in a synonym or segment, or for an individual column.

For alphanumeric columns, Data Profiling provides the segment, format, count of distinct values, total count, patterns count, maximum, minimum, and average length, minimum and maximum values, and number of nulls. Patterns count shows the number of patterns found in each alphanumeric column.

For numeric columns, Data Profiling provides the segment, format, count of distinct values, total count, maximum, minimum, and average values, and number of nulls.

Data Profiling for an individual column provides access to Statistics, Patterns, Values, and Outliers reports.

Procedure: How to View Data Profiling for a Synonym or Segment

To view the Data Profiling information for a synonym or segment:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click the synonym or segment name, select *Data Profiling*, and then *Statistics*.

The Data Profiling information displays in the workspace.

You may use the Data Profiling Results toolbar to view server messages, print the report, copy data as text, and export the report.

3. Optionally, you can click a column name or patterns count (for alphanumeric columns) to drill down to the Values or Patterns reports, respectively.

This is a partial Values report produced by clicking a column name.

For pattern analysis, a 9 represents a digit, an A represents any uppercase letter, and an a represents any lowercase letter. All printable special characters are represented by themselves and unprintable characters are represented by an X.

Viewing Data Profiling Columns

Data Profiling can be done for all the columns in a synonym or segment (press the Shift or Ctrl key while selecting multiple columns), or for an individual column. Data Profiling for an individual column provides access to the following reports:

- ❑ **Statistics.** Shows the same information as a Data Profile report for a synonym or segment.

For alphanumeric columns, the Statistics report provides the segment, format, count of distinct values, total count, patterns count, maximum, minimum, and average length, minimum and maximum values, and number of nulls.

For numeric columns, the Statistics report provides the segment, format, count of distinct values, total count, maximum, minimum, and average values, and number of nulls.

- ❑ **Hex View.** Shows values in Hexadecimal format.

- ❑ **Patterns.** Only available for alphanumeric columns, shows patterns of letters, digits, and special characters, as well as counts and their percents.
- ❑ **Values.** Shows unique values and their percents.
- ❑ **Values Graph.** Displays a graph for alphanumeric field types.
- ❑ **Values Pie Graph.** Displays a pie graph for alphanumeric field types.
- ❑ **Duplicate Values.** Shows identical values and their percents.
- ❑ **Outliers.** Shows the ten highest and lowest distinct values and their counts.

These reports are available by right-clicking a column in the Metadata canvas and selecting *Data Profiling*.

Procedure: How to View Data Profile Statistics

To view the Statistical Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Statistics*.

The Statistical Data Profiling information opens in the workspace, as shown in the following image.

	Segment	Name	Format	Count	Distinct Count	Distinct Percent	Minimum	Maximum	Average
1	WF_RETAIL_SALES	ID_SALES	I9	2488361	2488361	100.00	1	2506705	1252063

3. Optionally, you can click a column name or patterns count (for alphanumeric columns) to drill down to the Values or Patterns reports, respectively.

Procedure: How to View Data Profile Hex View

Data Profile Hex View shows values in Hexadecimal format.

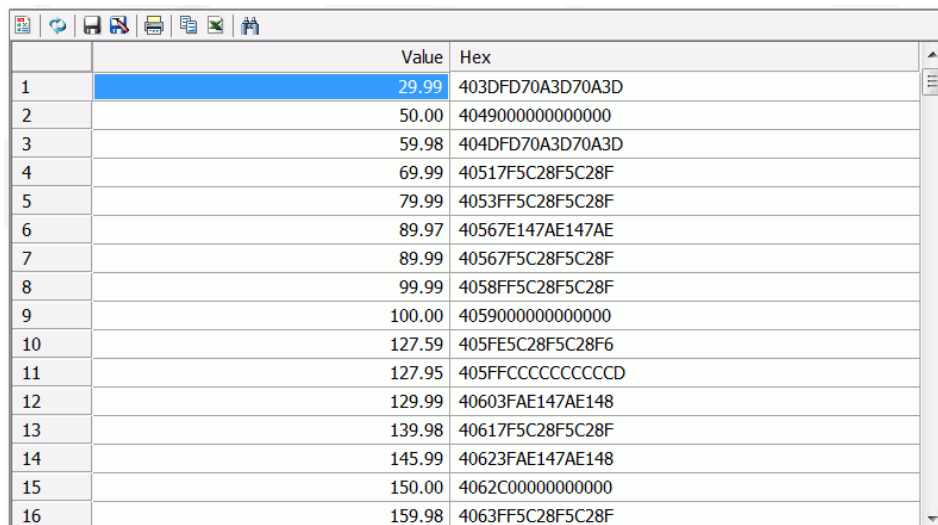
To view the Hex View Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Hex View*.

The Patterns Data Profiling information displays, as shown in the following image.



	Value	Hex
1	29.99	403DFD70A3D70A3D
2	50.00	4049000000000000
3	59.98	404DFD70A3D70A3D
4	69.99	40517F5C28F5C28F
5	79.99	4053FF5C28F5C28F
6	89.97	40567E147AE147AE
7	89.99	40567F5C28F5C28F
8	99.99	4058FF5C28F5C28F
9	100.00	4059000000000000
10	127.59	405FE5C28F5C28F6
11	127.95	405FFCCCCCCCCCD
12	129.99	40603FAE147AE148
13	139.98	40617F5C28F5C28F
14	145.99	40623FAE147AE148
15	150.00	4062C00000000000
16	159.98	4063FF5C28F5C28F

Procedure: How to View Data Profile Patterns

Data Profile Patterns shows patterns of letters, digits, and special characters, as well as counts. This is only available for alphanumeric columns.

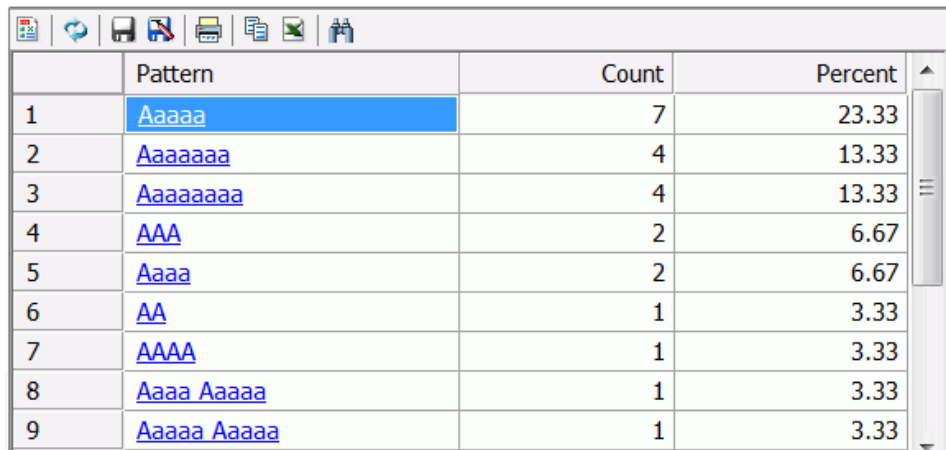
To view the Patterns Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Patterns*.

The Patterns Data Profiling information displays, as shown in the following image.



	Pattern	Count	Percent
1	Aaaaa	7	23.33
2	Aaaaaaa	4	13.33
3	Aaaaaaaaa	4	13.33
4	AAA	2	6.67
5	Aaaa	2	6.67
6	AA	1	3.33
7	AAAA	1	3.33
8	Aaaa Aaaaa	1	3.33
9	Aaaaa Aaaaa	1	3.33

For pattern analysis, a 9 represents a digit, an A represents any uppercase letter, and an a represents any lowercase letter. All printable special characters are represented by themselves and unprintable characters are represented by an X.

Procedure: How to View Data Profile Values

Data Profile Values shows unique values.

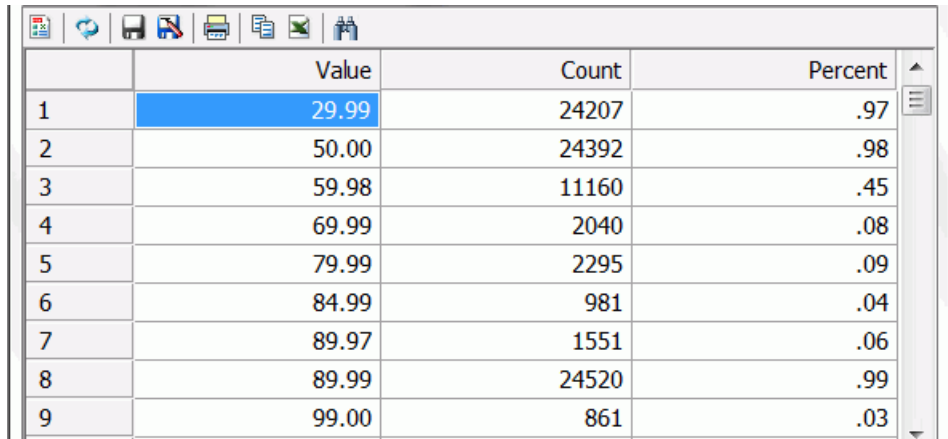
To view the Values Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Values*.

The Values Data Profiling information displays, as shown in the following image.



	Value	Count	Percent
1	29.99	24207	.97
2	50.00	24392	.98
3	59.98	11160	.45
4	69.99	2040	.08
5	79.99	2295	.09
6	84.99	981	.04
7	89.97	1551	.06
8	89.99	24520	.99
9	99.00	861	.03

Procedure: How to View the Data Profile Values Graph

The Data Profile Values Graph displays values as a bar graph.

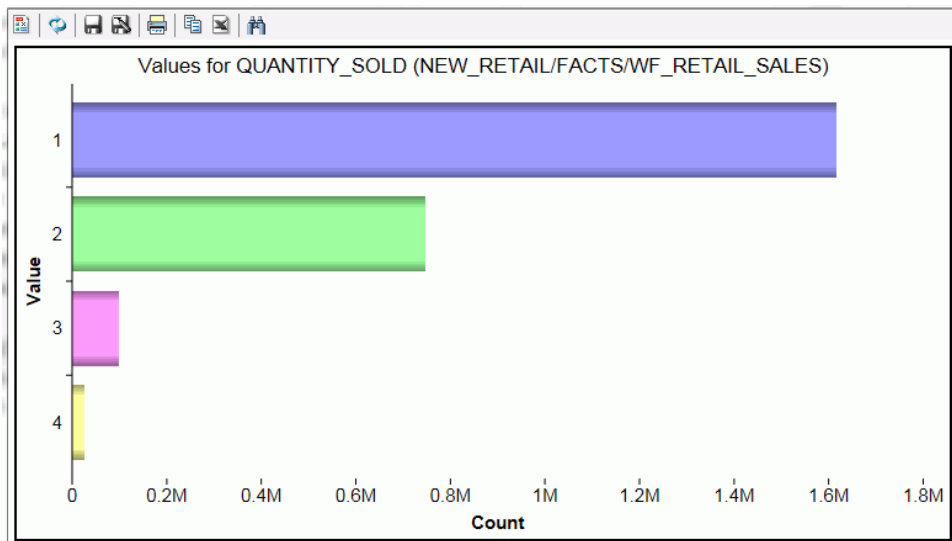
To view the Values Graph Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Values Graph*.

The Values Graph Data Profiling information displays, as shown in the following image.



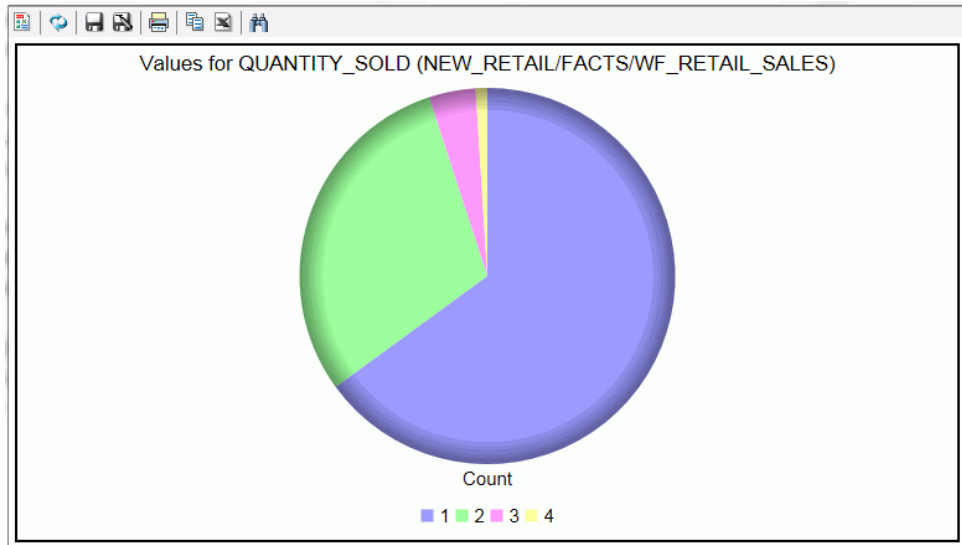
Procedure: How to View the Data Profile Values Pie Graph

The Data Profile Values Pie Graph displays values as a pie graph.

To view the Values Pie Graph Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.
By default, the Metadata canvas opens to the last view used.
2. Right-click a column, select *Data Profiling*, and then *Values Pie Graph*.

The Values Pie Graph Data Profiling information displays, as shown in the following image.



Procedure: How to View Data Profile Duplicate Values

Data Profile Duplicate Values shows identical values.

To view the Duplicate Values Data Profiling information for a single column:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Right-click a column, select *Data Profiling*, and then *Duplicate Values*.

The Duplicate Values Data Profiling information displays, as shown in the following image.

	Value	Count	Percent
1	100	1833462	73.68
2	101	252236	10.14
3	102	176451	7.09
4	103	75401	3.03
5	104	75239	3.02
6	105	50120	2.01
7	106	25452	1.02

Procedure: How to View Data Profile Outliers

Data Profile Outliers shows the ten highest and ten lowest distinct values.

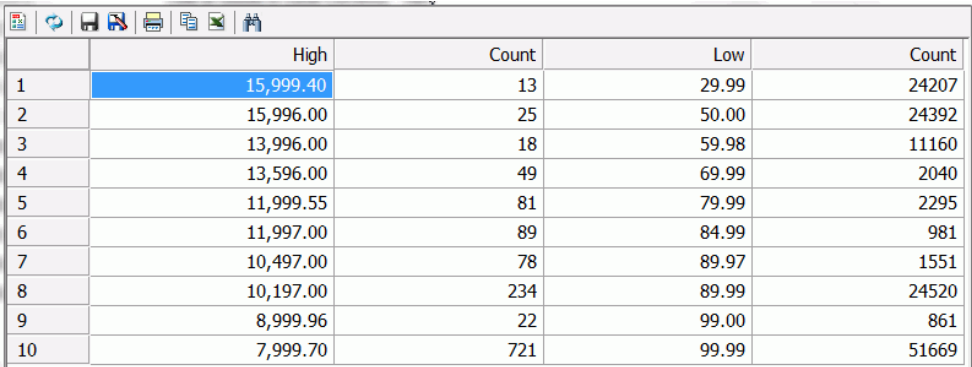
To view the Outliers Data Profiling information for a single column:

- 1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

- 2. Right-click a column, select *Data Profiling*, and then *Outliers*.

The Outliers Data Profiling information displays, as shown in the following image.



	High	Count	Low	Count
1	15,999.40	13	29.99	24207
2	15,996.00	25	50.00	24392
3	13,996.00	18	59.98	11160
4	13,596.00	49	69.99	2040
5	11,999.55	81	79.99	2295
6	11,997.00	89	84.99	981
7	10,497.00	78	89.97	1551
8	10,197.00	234	89.99	24520
9	8,999.96	22	99.00	861
10	7,999.70	721	99.99	51669

Note: Outliers produce a maximum of the ten highest and ten lowest distinct values, if they exist.

Enhancing a Master File With Expressions

Using an expression, you can create virtual columns and store calculations and selection criteria in a Master File.

Adding Virtual Columns (DEFINE) in a Synonym

You may create a DEFINE field as a custom field in a synonym. A custom field can be used in a request as though it is a real data source field. Virtual columns (DEFINE fields) are available when the data source is used for reporting.

A virtual column can contain an expression, a constant, or a column name.

Procedure: How to Create a Virtual Column in a Synonym

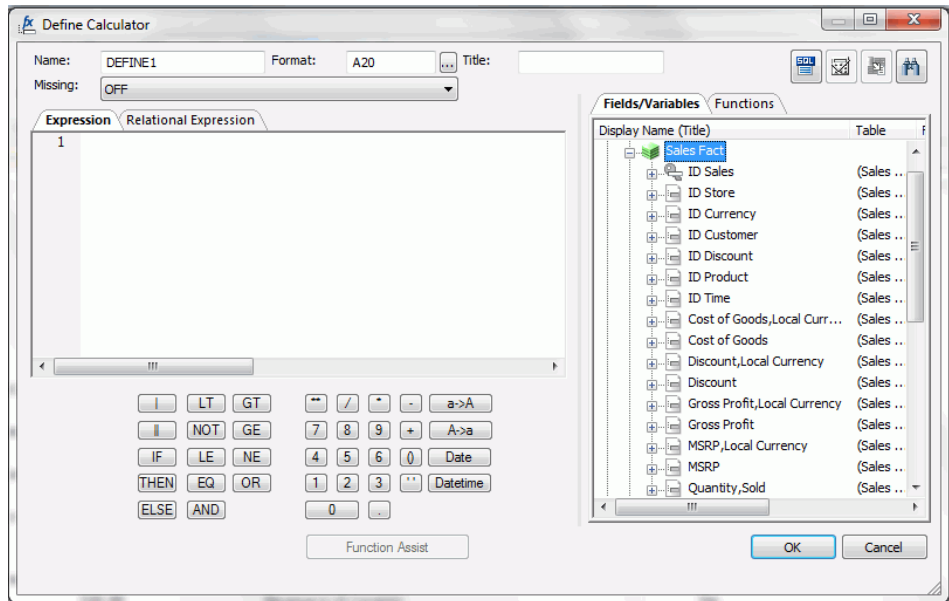
To create a virtual column in a synonym:

1. From an application directory in the navigation pane, double-click a synonym, or right-click it and click *Open*.

The Metadata canvas opens.

2. Right-click a segment (or column), select *Insert*, and then click *Define*.

The Define Calculator opens, as shown in the following image.



3. From the Define Calculator, type a name for the column in the Name input field, or use the default define name.
4. Type a format for the column in the Format input field, or click the browse (...) button at the right of the Format input field to launch the Properties dialog box to enter the information.

5. You may enter a descriptive title for the virtual column (DEFINE) in the Title input field.

Tip: From the Metadata canvas, click the browse (...) button at the right of the TITLE and DESCRIPTION value fields to specify multiple language titles.

6. Specify the Missing Data option for columns that allow null data. You can allow all missing data.
7. Use the Expression tab and the calculator buttons to build the expression for the virtual column (DEFINE).

or

Use the Relational Expression tab to build the expression.

- a. From the Relational Expression tab, use the drop-down lists to select the filter Column, Relation, and Type.

Note: Parameters are not supported.

- b. Click the browse (...) button at the right of the Value input field.
The Value Selection dialog box opens.
 - c. Select from the available values and use the arrows to add or remove values.
 - d. Click *OK* to close the Value Selection dialog box and return to the Relational Expression tab.
The expression is added to the value field.
 - e. To add another filter, double-click a column or variable from the Columns/Variables tab on the right side of the Virtual Column Calculator.
The filter is added to the Relational Expression tab, where you can add the expression value.
 - f. To delete an expression, click in the row number column of the expression that you are deleting, right-click, and select *Delete Selected Row(s)*. The expression is removed from the Relational Expression tab.
8. You may select the *Check Expression* and *Sample Data* buttons, located on the top right of the Virtual Column Calculator, to verify that the expression is valid and to view sample data for the filter.
 9. Click *OK* to close the Define Calculator and return to the Metadata canvas.

Note: To edit the Define, Title, or Expression, you may do so directly from the Metadata canvas, or you may click the browse (...) button at the right of the EXPRESSION value field to relaunch the Define Calculator.

10. If no columns from the synonym are used in the expression or have been defined, you can use the WITH option to identify the logical home of the defined calculation. You can also use the WITH option to move the logical home for the virtual column to a lower segment than it would otherwise be assigned (for example, to count instances in a lower segment).

Tip: You can click and drag the DEFINE field and move it to a different segment in the Tree View tab, which also changes the segment association.

11. Click Save from the Quick Access Toolbar to save the synonym.

Adding Computed Fields (COMPUTE) in a Synonym

You may create a Computed field as a custom field in the Metadata canvas. The procedure for adding a custom field is similar to the procedure used to add a Defined field. The Computed field is identified as the Master File Computed field and is differentiated from the Defined fields and the other Computed fields.

Procedure: How to Create a Computed Field in the Metadata Canvas

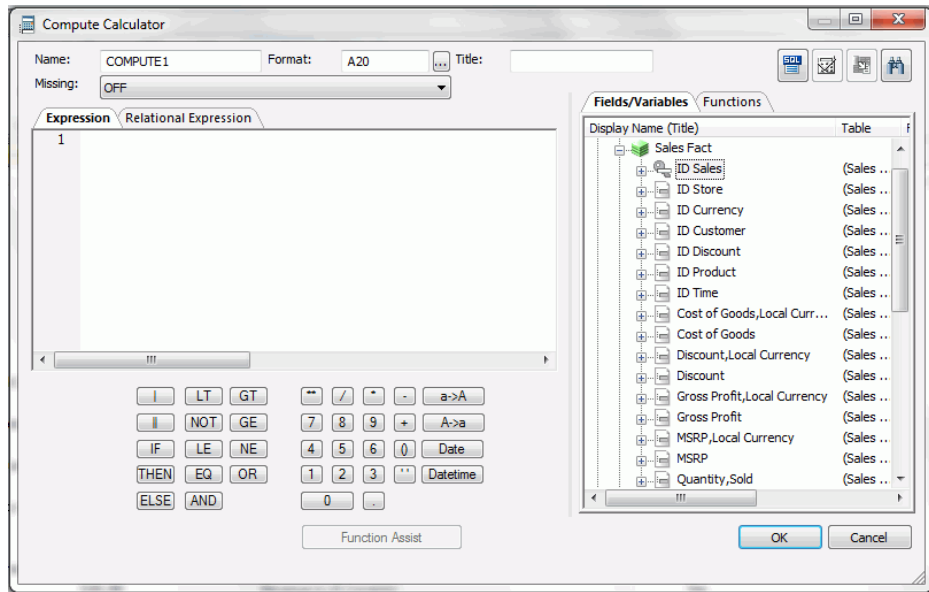
To create a computed column in a synonym

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

The Metadata canvas opens.

2. Right-click a segment (or column), select *Insert*, and click *Compute*.

The Compute Calculator opens.



3. From the Compute Calculator, type a name for the column in the Column input field or use the default compute name.
4. Type a format for the column in the Format input field, or click the browse (...) button at the right of the Format input field to launch the Properties dialog box to enter the information.
5. You may enter a descriptive title for the computed field (COMPUTE) in the Title input field.


Tip: From the Metadata canvas, click the browse (...) button at the right of the TITLE and DESCRIPTION value fields to specify multiple language titles.

6. Specify the Missing Data options for columns that allow null data. You can allow all missing data.

7. Use the Expression tab and the calculator buttons to build the expression for the computed field (COMPUTE).

or

Use the Relational Expression tab to build the expression.

- a. From the Relational Expression tab, click the *Add New Row* button  and use the drop-down lists to select the filter Column, Relation, and Type.

Note: Parameters are not supported.

- b. Click the browse (...) button at the right of the Value input field.
- c. Select from the available values and use the arrows to add or remove values.
- d. Click *OK* to close the Value Selection dialog box and return to the Relational Expression tab.

The expression is added to the value field.

- e. To add another filter, double-click a column or variable from the Columns/Variables tab on the right side of the Compute Calculator.

The filter is added to the Relational Expression tab, where you can add the expression value.

- f. To delete an expression, select the number or field column of the expression and click the *Delete* button, or right-click it and select *Delete Selected Row(s)*. The expression is removed from the Relational Expression tab.

8. You may click the Check expression and Sample Data buttons, located on the top right of the Compute Calculator, to verify that the expression is valid and to view sample data for the filter.
9. Click *OK* to close the Compute Calculator and return to the Metadata canvas.

Note: To edit the Compute, Title, or Expression, you may do so directly from the Properties section of the Metadata canvas or you may click the browse (...) button at the right of the EXPRESSION value field to relaunch the Compute Calculator.

10. Click *Save* from the File menu to save the synonym.

For more information about expressions and COMPUTE attributes, see [Defining Attributes and Creating Expressions for Custom Fields](#) on page 194.

Creating Filters in a Synonym

Filters are created in the Master File through the Metadata canvas and can be used in a Business View file or in reporting tools. You can also use filters to perform other data checking and validation, and sort data based on the conditions that you create.

Filters are created under a specific segment and, by default, they have association with the selected segment. Filters can also be created without segment association.

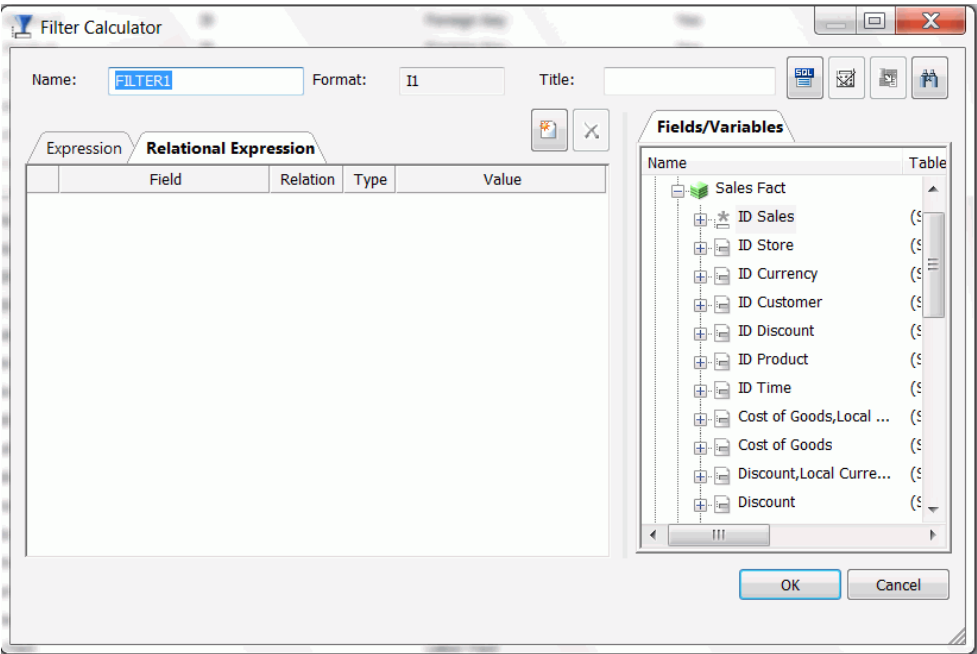
Procedure: How to Create Filters in a Synonym

- 1. From the Projects or Data Servers area, double-click a synonym from the Master Files folder, or right-click the synonym and select *Edit in Synonym Editor*.

The Metadata canvas opens.

- 2. Right-click a segment or field, select *Insert*, and click *Filter*.

The Filter Calculator opens, as shown in the following image.



- 3. From the Filter Calculator, type a name for the filter in the Name input field or use the default filter name.

Note: It is recommended that filters have a descriptive name to help identify the filter action during reporting.

4. The Format field shows a default value of I1.

Note: The Format field cannot be changed. Values for filters return 0 for false and 1 for true.


5. You may enter a descriptive title for the filter in the Title input field.

Tip: From the Properties panel in the Metadata canvas, click the browse (...) button at the right of the TITLE and DESCRIPTION value fields to specify multiple language titles.

6. Use the Expression tab and the calculator buttons to build the expression for the filter.

or

Use the Relational Expression tab to build the expression.

- a. From the Relational Expression tab, click the *Add New Row* button  and use the drop-down lists to select the filter Column, Relation, and Type.

Note: Parameters are not supported with Master File Filters.

- b. Click the browse (...) button at the right of the Value input field.
The Value Selection dialog box opens.
- c. Select from the available values and use the arrows to add or remove values.
- d. Click *OK* to close the Value Selection dialog box and return to the Relational Expression tab.
The expression is added to the value field.
- e. To add another filter, double-click a column or variable from the Fields/Variables section on the right side of the Filter Calculator.
The filter is added to the Relational Expression tab where you can add the expression value.
- f. To delete an expression, select the number or field column of the expression and click the *Delete* button, or right-click it and select *Delete selected row(s)*.
The expression is removed from the Relational Expression tab.

7. You may click the Check Expression and Sample Data buttons, located on the top right of the Filter Calculator to verify that the expression is valid and to view sample data for the filter.
8. Click *OK* to close the Filter Calculator and return to the Metadata canvas.

Note: To edit the Filter, Title, or Expression, you may do so directly from the Properties panel in the Metadata canvas or you may click the browse (...) button at the right of the EXPRESSION value field to relaunch the Filter Calculator.

9. To create a Filter without segment association, use the WITH drop-down list in the Properties panel to select a blank segment.

Filters are created under a specific segment and by default they have association with the selected segment. Filters can also be created without segment association.

Note: If you are using a field that appears in multiple segments, the WITH segment associated should be the lowest level segment or it should be left empty to prevent errors.

In addition, if no fields from the synonym are used in the expression or have not been computed, you can use the WITH option to identify the logical home of the filter calculation. You can also use the WITH option to move the logical home for the filter field to a lower segment than it would otherwise be assigned (for example, to count instances in a lower segment).

10. Click *Save* from the File menu to save the synonym.

The filter is saved as part of the synonym.

Defining Attributes and Creating Expressions for Custom Fields

A custom field is a field whose value is not stored in the data source but can be calculated from the data that is there. You can create a custom field in your synonym by adding a virtual column (DEFINE), a Computed Field (COMPUTE), and a Master File filter (FILTER). The fields are available whenever you access the corresponding data source in a reporting tool.

You can define attribute values and create expressions for custom fields using the Metadata canvas.

Reference: Custom Field Attributes

The following attributes may be available for custom fields (DEFINE, COMPUTE, and FILTER) in the Metadata canvas.

Note: The attributes available depend on the type of synonym and the type of custom field selected.

Custom fields (DEFINE, COMPUTE, and FILTER) typically have the following attributes:

General**DEFINE**

Is the name of the virtual column.

Note: This attribute only appears when a virtual column (DEFINE) is selected.

COMPUTE

Is the name of the computed field.

Note: This attribute only appears when a virtual computed field is selected.

FILTER

Is the name of the Master File Filter field.

Note: This attribute only appears when a virtual filter field is selected.

EXPRESSION

Is the expression that creates the virtual column.

TITLE

Supplies a title to replace the column name that is normally used in reports and enables you to specify multiple language titles for the virtual column.

FORMAT

Describes the data type and format for the virtual column.

Note: This attribute only appears for DEFINE and COMPUTE custom fields.

MISSING

Allows missing data. If not, the transaction value is supplied.

Note: This attribute only appears for DEFINE and COMPUTE custom fields.

Miscellaneous

REDEFINES

A DEFINE expression may not contain qualified field names. REDEFINES enables you to redefine or recompute a column whose name exists in more than one segment.

Note: This attribute only appears for DEFINE custom fields and cannot be used by WebFOCUS.

WITH

If no columns from the synonym are used in the expression or have been defined, you can use the WITH option to identify the logical home of the defined calculation. You can also use the WITH option to move the logical home for the virtual column to a lower segment than it would otherwise be assigned (for example, to count instances in a lower segment).

Note: This attribute only appears for DEFINE and FILTER custom fields.

DESCRIPTION

Contains a description or comments about the virtual column.

ACCESS_PROPERTY

Specifies access options for the column data.

INTERNAL defines a column that does not appear in sample data or in the list of available columns. Restricts the field from showing in any of the Field Lists.

NEED_VALUE defines a column that requires a value to access the data. Indicates that a selection is needed in the report request (WHERE condition).

Select By defines a column by value, range, or multivalues:

- ☐ If Value is checked, only one value should be defined for selection in the report request.
- ☐ If Range is checked, a range selection should be defined in the report request.
- ☐ If Multivalues is checked, multiple values are allowed for selection in the report request.

GEOGRAPHIC_ROLE

Defines the geographic role of the column.

WITHIN

Contains the name of a field to be included in a dimension.

These WITHIN statements are added to the synonym through the Dimension Builder to OLAP-enable WebFOCUS files and relational tables.

Note: This attribute only appears for DEFINE and FILTER custom fields.

TEMPORAL_PROPERTY

Inserts virtual fields in the Master File to show how selected totals progressed through a time period for specified intervals.

USE_STYLE

Are the styles (for example, font and color) to apply to the field.

Note: The attributes available depend on the type of synonym.

Reference: Calculators for Custom Fields

The Define Calculator, Compute Calculator, and Filter Calculator have the following fields and options:

Name

Is the name of the object being created (virtual field (DEFINE), filter, computed field).

Format

Is the field format.

Title

Is the title of a new target table created by a data flow. The title will be included in the synonym that is created.

Missing

Indicates if missing (null) values are allowed in this field. The following options are available:

- ☐ **OFF.** The result is never missing.
- ☐ **ON.** The result is missing only if all missable fields are missing.

- ❑ **ON ALL.** The result is missing if any missable fields are missing.

Expression tab

Location for typing an expression. You can add data source fields from the Columns/Variables tab, functions from the Functions tab, and numbers and operators from the calculator as you type.

Relational Expression tab

Displays the expression building window from which you can add and delete columns, choose the relation and type, and select values for your filter.

Fields/Variables tab

Displays a hierarchical list of available source columns and System Variable folders that you can use in creating an expression.

Functions tab

A function is a program that returns a value. This tab lists the built-in functions that you can use to derive the value of a temporary field.

Function Assist button

Enables you to specify parameters for the function through a dialog box when creating or editing a transformation.

Calculator buttons

Enables you to insert numbers and operators.

The following operators are available:

| (single concatenation bar)

Concatenates two values, retaining any trailing blanks after the first one. For example, if FIRST_NAME and LAST_NAME were both in A15 format, the expression

```
FULL_NAME = FIRST_NAME | LAST_NAME
```

would produce a column like the following:

```
MICHAEL      SMITHSONJ
ANE          JONES
.
.
.
```

|| (double concatenation bar)

Concatenates two values, suppressing any trailing blanks in the first. For example, to construct the full name and insert a comma (,), the syntax

```
FULL_NAME = LAST_NAME || (', ' | FIRST_NAME)
```

would produce a column like the following:

```
SMITHSON, MICHAEL
JONES, JANE
.
.
.
```

The concatenation in the parentheses is done first (preserving the blank space after the comma), and the result is then concatenated to LAST_NAME, suppressing the trailing blanks of LAST_NAME.

IF

Establishes a conditional test.

THEN

Specifies the action to perform if the result of a conditional test is TRUE.

ELSE

Specifies the action to perform if the result of a conditional test is FALSE.

LT

Returns the value TRUE if the value on the left is less than the value on the right.

NOT

Returns the value TRUE if the operand is false.

LE

Returns the value TRUE if the value on the left is less than or equal to the value on the right.

EQ

Returns the value TRUE if the value on the left is equal to the value on the right.

AND

Returns the value TRUE if both operands are true.

GT

Returns the value TRUE if the value on the left is greater than the value on the right.

GE

Returns the value TRUE if the value on the left is greater than or equal to the value on the right.

NE

Returns the value TRUE if the value on the left is not equal to the value on the right.

OR

Returns the value TRUE if either operand is true.

Raises a value to the specified power.

()

Adds parentheses.

''

Inserts two single quotation marks. Enter alphanumeric test values between the quotation marks.

a->A

Converts selected text to uppercase.

A->a

Converts selected text to lowercase.

Date

Opens the Date dialog box, where you can change the format for the Date field.

Datetime

Opens the Date Time dialog box, where you can change the format for the Datetime field.

Check expression button

Verifies the validity of the expression.

Sample data button

Produces sample data for the expression.

Describing Group Fields and Repeating Fields in a Synonym

For data sources that support groups, you can assign a unique name to multiple fields to create a group field. A group field is created by two or more alphanumeric fields, physically next to each other. A group field provides an efficient means for grouping similar or logically connected fields that will be accessed as a single unit, but do not warrant a separate segment.

Procedure: How to Add a Group Field to a Segment

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

The Metadata canvas opens.

2. Right-click a segment (or column), select *Insert*, and click *Group*.

Note: The group option may not be available for some data sources.

A group is added to the synonym and its attributes and values appear on the right.

3. Type a name for the group in the *GROUP* field.
4. Select the *USAGE Type* value for the group. Specify the length, the decimal places (if applicable) and any display options for the group.
5. Select the *I - Index* check box if you want the group to be indexed.
6. Select the *ACCESS_PROPERTY* values to specify access options for the group data.
 - ☐ *INTERNAL* defines a column that will not appear in sample data or in the list of available fields.
 - ☐ *NEED_VALUE* defines a column that requires a value to access the data.

- ☐ Select By defines a column by value, range, or multivalues.
- 7. Optionally, you can specify the TITLE and DESCRIPTION display options.
- 8. Click Save from the File menu to save the synonym.

Note: When you add a group, a field is automatically added to the group.

Procedure: How to Add a New Field to a Group Field

1. Right-click the group field to which you want to add a new field, select *Insert*, and click *Field*.
A field is added to the group and its attributes and values appear on the right.
2. Supply the required information for the group field. For more information about field attributes, see [Viewing and Editing Synonym Attributes](#) on page 169.

Procedure: How to Add an Existing Field to a Group Field

1. Click the field you want to add to the group field.
2. While holding the left mouse button down, drag the field and drop it on the group field name.
The field is added to the group field.

Procedure: How to Delete a Group Field From a Segment

1. Right-click the group and select *Delete*.
A confirmation appears stating that all columns (fields) within the group will be deleted.
2. Click Yes to delete the group and move the fields (within the group) under the root segment of the synonym.
Click No to delete the group and all of the fields within the group.
Click *Cancel* to close the Confirm dialog box and return to the Metadata canvas.

Procedure: How to Delete a Field From a Group Field

Right-click the field, then select *Delete*.

Reference: Group Field Attributes

Group fields in a synonym can have the following attributes:

General**GROUP**

Is the name of the group.

ALIAS

Assigns an alternative name for a group.

If you create a report, the group name appears as a column heading unless you have specified an alternate title for the group. Aliases cannot be used as column titles.

TITLE

Supplies a title to replace the group name that is normally used in reports and enables you to specify multiple language titles for the group.

USAGE

Contains the format for the group field. Since the group field is made by concatenating together several other fields, the Metadata canvas determines what this format needs to be. For example, if the group field has two alphanumeric fields in it, each 20 characters long (A20), then the group field must be alphanumeric and 40 characters long (A40). The group field is always alphanumeric, regardless of the fields that make it up.

Miscellaneous**DESCRIPTION**

Contains a description or comments about the group. The description displays in Field lists and on the status bar.

Field descriptions also appear as bubble help in OLAP-enabled reports. If you do not include a description, bubble help shows the field name (column title).

FIELDTYPE

Identifies an indexed group. You can index the values of a field to enhance data retrieval performance. To do so, select the Index check box when you add a field and before you add the data. An index is an internally stored and maintained table of data values and locations that enhance the performance of data retrieval. A Master File can have several associated indexes, but the combined total of indices and segments cannot exceed 64.

Note: FIELDTYPE=R indicates a read-only column. This setting is useful for columns that are automatically assigned a value by the RDBMS.

Tip: You can turn on the index after adding data to a field, however, you will have to use the Rebuild Index option to create the index.

ACCESS_PROPERTY

Specifies access options for the column data.

INTERNAL defines a column that does not appear in sample data or in the list of available columns. Restricts the field from showing in any of the Field Lists.

NEED_VALUE defines a column that requires a value to access the data. Indicates that a selection is needed in the report request (WHERE condition).

Select By defines a column by value, range, or multivalues:

- ☐ If Value is checked, only one value should be defined for selection in the report request.
- ☐ If Range is checked, a range selection should be defined in the report request.
- ☐ If Multivalues is checked, multiple values are allowed for selection in the report request.

USE_STYLE

Are the styles (for example, font and color) to apply to the field.

Note: The attributes available depend on the type of synonym.

Storing the Number of Repetitions of a Repeating Field in a Virtual Field

The OCCURS attribute in a Master File describes repeating fields or groups of fields in a data source. The repeating group of fields is described as a descendent segment in the Master File, and the OCCURS attribute for that segment specifies how to determine the number of repetitions.

The number of repetitions does not have to be the same for every record instance. Sometimes, the number of repetitions can be derived from a field in the data source. In that case, you can create a virtual field in the Master File that indicates the number of repetitions for each record and use that virtual field as the value of the OCCURS attribute.

Syntax: How to Specify an OCCURS Segment Using a Virtual Field

```

SEGNAME = parent, SEGTYPE = segtype, $
.
.
.
DEFINE definefield/In = expression;
SEGNAME = osegname, SEGTYPE=S0, PARENT = parent,
    OCCURS = definefield , $
FIELDNAME = rfield, ALIAS = ralias,
    USAGE = rufmt, ACTUAL = rafmt, $
.
.
.
[FIELDNAME = orderfield, ALIAS = ORDER,
    USAGE = In, ACTUAL = I4, $]

```

where:

parent

Is the name of the parent segment.

segtype

Is the SEGTYPE of the parent segment.

definefield

Is the virtual field that indicates the number of repetitions of the repeating field or group of fields. This field must be defined in a segment that is an ancestor of the segment containing the repeating fields.

n

Is the format of the virtual field that describes the number of repetitions. It must be an integer format.

expression

Is a valid expression that derives the number of repetitions for each record instance.

osegname

Is the name of the descendent OCCURS segment.

rfield

Is the name of a repeating field in the OCCURS segment.

ralias

Is the alias of a repeating field in the OCCURS segment.

rufmt

Is the display format for a repeating field in the OCCURS segment.

rafmt

Is the actual format for a repeating field in the OCCURS segment.

orderfield

Is the name of an internal counter field that you can specify as the last field in the OCCURS segment. The ORDER field associates a sequence number with each occurrence and is useful when the order of the repeating data is significant. For example, the values may represent monthly or quarterly data, but the record itself may not explicitly specify the month or quarter to which the data applies. The USAGE format must be integer and the ACTUAL format is I4.

Note: The virtual field used as the OCCURS value cannot be redefined inside or outside of the Master File.

Example: Using a Virtual Field With an OCCURS Segment

The following request against the EMPLOYEE data source creates a fixed-format sequential file with a repeating field. The request:

- ❑ Counts the number of FICA deductions for each employee.
- ❑ Creates a calculated field that contains the length of all FICA deduction fields for each employee.
- ❑ Creates a HOLD file in which each record contains the calculated length of the deduction fields for the employee, the identifying information for the employee, and all FICA deductions for the employee.

Note that the number of deductions will vary for each employee. The part of the record that contains the deductions will constitute the OCCURS segment. The number of repetitions will have to be derived from the length field created in the TABLE request.

The procedure to create the file with the repeating deduction field follows:

```

DEFINE FILE EMPLOYEE
  CTR/I5 WITH DED_AMT = IF EMP_ID NE LAST EMP_ID THEN 1 ELSE LAST CTR + 1;
END
TABLE FILE EMPLOYEE
  SUM CNT.DED_AMT NOPRINT EMP_ID LAST_NAME FIRST_NAME CURR_SAL
  COMPUTE DEDLEN/I5 = 12 * CNT.DED_AMT;
  BY EMP_ID NOPRINT
  SUM DED_AMT
  BY EMP_ID NOPRINT
  ACROSS CTR NOPRINT
  WHERE DED_CODE EQ 'FICA'
  ON TABLE SET HOLDLIST PRINTONLY
  ON TABLE HOLD AS OCCURS1 FORMAT ALPHA
END

```

The OCCURS1 file has one record per employee with a variable number of DED_AMT fields. The total length of the number of actual instances of DED_AMT is stored in the field named DEDLEN. The Master File generated by the HOLD command lists 10 DED_AMT fields:

```

FILENAME=OCCURS1 , SUFFIX=FIX , $
SEGMENT=OCCURS1, SEGTYPE=S0, $
  FIELDNAME=EMP_ID, ALIAS=E01, USAGE=A9, ACTUAL=A09, $
  FIELDNAME=LAST_NAME, ALIAS=E02, USAGE=A15, ACTUAL=A15, $
  FIELDNAME=FIRST_NAME, ALIAS=E03, USAGE=A10, ACTUAL=A10, $
  FIELDNAME=CURR_SAL, ALIAS=E04, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DEDLEN, ALIAS=E05, USAGE=I5, ACTUAL=A05, $
  FIELDNAME=DED_AMT, ALIAS=E06, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E07, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E08, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E09, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E10, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E11, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E12, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E13, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E14, USAGE=D12.2M, ACTUAL=A12, $
  FIELDNAME=DED_AMT, ALIAS=E15, USAGE=D12.2M, ACTUAL=A12, $

```

You can edit the Master File to describe these repeating DED_AMT fields with an OCCURS segment. The DEFINE field named NUMOCC derives the number of occurrences from the DEDLEN field. The ORDER field is not actually in the file. It is an internal counter populated by App Studio.

```
FILENAME=OCCURS1 , SUFFIX=FIX , $
  SEGMENT=OCCURS1, SEGTYPE=S0, $
    FIELDNAME=EMP_ID, ALIAS=E01, USAGE=A9, ACTUAL=A09, $
    FIELDNAME=LAST_NAME, ALIAS=E02, USAGE=A15, ACTUAL=A15, $
    FIELDNAME=FIRST_NAME, ALIAS=E03, USAGE=A10, ACTUAL=A10, $
    FIELDNAME=CURR_SAL, ALIAS=E04, USAGE=D12.2M, ACTUAL=A12, $
    FIELDNAME=DEDLEN, ALIAS=E05, USAGE=I5, ACTUAL=A05, $
    DEFINE NUMOCC/I2 = DEDLEN/12;,$
  SEGNAME=DEDUCTION, SEGTYPE=S0, PARENT=OCCURS1, OCCURS=NUMOCC,$
    FIELDNAME=DED_AMT, ALIAS=E06, USAGE=D12.2M, ACTUAL=A12, $
    FIELDNAME=ORDER, ALIAS=ORDER, USAGE=I2 , ACTUAL=I4 , $
```

The following request uses the ORDER field to select and print the first occurrence of the repeating field for each employee. Since every employee has at least one deduction, every employee is represented on the report output:

```
TABLE FILE OCCURS1
  PRINT NUMOCC LAST_NAME CURR_SAL DED_AMT
  WHERE ORDER EQ 1
END
```

The output is:

NUMOCC	LAST_NAME	CURR_SAL	DED_AMT
-----	-----	-----	-----
10	STEVENS	\$11,000.00	\$64.17
8	SMITH	\$13,200.00	\$100.10
4	JONES	\$18,480.00	\$247.94
8	SMITH	\$9,500.00	\$60.96
1	BANNING	\$29,700.00	\$519.75
8	IRVING	\$26,862.00	\$626.78
4	ROMANS	\$21,120.00	\$317.62
1	MCCOY	\$18,480.00	\$161.70
5	BLACKWOOD	\$21,780.00	\$444.67
7	MCKNIGHT	\$16,100.00	\$187.88
4	GREENSPAN	\$9,000.00	\$52.50
10	CROSS	\$27,062.00	\$631.40

If you print the tenth occurrence of the repeating field, only two employees are displayed on the report output:

```
TABLE FILE OCCURS1
  PRINT NUMOCC LAST_NAME CURR_SAL DED_AMT
  WHERE ORDER EQ 10
END
```

The output is:

NUMOCC	LAST_NAME	CURR_SAL	DED_AMT
10	STEVENS	\$11,000.00	\$58.33
10	CROSS	\$27,062.00	\$526.20

Parameterizing a Synonym With Variables

You can define variables in a synonym in order to specify synonym attributes, such as the connection name or the table name.

Procedure: How to Add a Variable to a Synonym

1. Right-click an object in the Metadata canvas, select *Insert*, and then click *Variable*.
2. A new folder named Variables is added to the object tree, with &&VARIABLE1 as an entry. The Properties panel shows the attributes of the variable.
3. If desired, change the name of the variable and enter a default value in the appropriate fields.

Reference: Variables Attribute Summary

Variables in a synonym can have the following attributes:

VARIABLE

The name of the variable. A double ampersand (&&) is automatically inserted in the name to indicate a global variable.

DEFAULT

The default value for the variable. If no value is set, the default value is used.

QUOTED

When selected, single quotation marks are added around the assigned string for the variable. A single quotation mark within the string is converted into two single quotation marks.

FORMAT

Optional description of the prompt value format for the variable. The format type can be Alpha fixed, Integer, or Decimal Packed.

PROMPT

The text that appears when prompting for a value for the variable.

ACCEPT

Allows you to select the method used to specify values that can be accepted for this variable.
The following options are available:

- ☐ OR
- ☐ DECODE
- ☐ FIND (applies to Maintain only)
- ☐ SYNONYM
- ☐ FOCEXEC
- ☐ FROM-TO

Select Type

Allows you to specify whether you can select from a single or multiple list of values.

Values

Lists the values that are acceptable.

Procedure: How to Use a Variable in a Synonym

Variables in a synonym are commonly used to represent a table name or connection name.

1. In a synonym for a relational database where variables have been established, click a segment to open the Properties panel that shows the Adapter Specific attributes.
2. In the fields for TABLENAME and CONNECTION, enter the names of the variables to be used.
3. Click Save to save your changes.

Adding Indexes to a Synonym

When you use *New, Synonym* to create a synonym for a relational database table with more indexes than just the primary key, they will be included in the synonym.

For WebFOCUS files, additional indexes are useful when you anticipate using a column in a JOIN operation, a WHERE condition, or as an argument to DB_LOOKUP. You can add multiple indexes. Each index can be on one or more columns. You can specify if the index is sorted, and whether it is a unique index.

Example: Adding an Index to a Column

1. Right-click the field name and select the I - Index check box on the Properties panel.

2. Select *Rebuild Data Source* from the Data button on the Home tab to rebuild the data source.

Creating Cluster Joins and Dimension Views

Cluster joins enable you to create a new file structure by linking existing synonyms of two or more relational tables using the same or mixed data sources. For example, you may join a DB2 table and an Oracle table, and so on. Use cluster joins to create new views in the metadata by linking together physical tables and easily report against the new view or structure. You can create cluster joins by using the Metadata canvas Modeling View.

The Master File that is created combines the fields of the joined tables within a single file. The Access File from the combined file contains information about the actual location of the data sources and the Join information. It also shows how the tables are linked.

The total number of tables that you can add to the tool is 512 (using 511 joins), which results in a new Master File that has a maximum of 512 segments.

The Cluster Join tool enables you to create a Star Schema which consists of a fact table referencing a number of dimension tables. Optionally, you can also create a view that has more than one fact table.

Procedure: How to Create a Cluster Join by Enhancing Existing Synonyms

Use the Modeling View to enhance an existing synonym by adding a segment.

1. From the Projects or Data Servers area, open a synonym by double-clicking a Master File from the Master Files folder.

The Metadata canvas opens.

2. Click the *Modeling View* tab.

The Modeling View tab opens in the workspace.

3. Right-click a segment in the workspace and select *Insert*.
4. Insert tables (segments) through one of the methods listed:

To insert a segment from an existing synonym as child or root:

- a. Select *Insert*, then *Reference to Existing Synonym as Child* or *Reference to Existing Synonym as Root*.

The Insert Reference to Existing Synonym dialog box opens.

- b. Select a synonym to be inserted and click *Select*.

Note: Use this method if you are creating a cluster join with an existing table or synonym.

Tip: Click *Save As* from the Modeling View File menu if you do not want to modify the original synonym.

To insert a segment via Metadata Import:

- a. Select *Insert*, then *Segment via Metadata Import*. This enables you to add segments by using the Create Synonym tool. This tool creates a synonym and includes it as a segment in the synonym from which the tool was launched.

Note: Use this method if you are creating a cluster join and need to use a synonym that does not exist. This option enables you to create the synonym and continue to create the cluster join.

- b. When this option is selected, you are first presented with the Adapter dialog box where you can select a configured adapter connection to continue or configure a new adapter, if necessary.

To insert a segment manually:

Select *Insert*, then *Segment Manually*. This enables you to assign values to segment attribute fields.

Note: Use this method if you are coding a new Master File, as you would for a WebFOCUS data source.

The segment is added in the Modeling View.

5. Right-click the join line between the segments.

Note: This option is only available when using relational tables.

6. Select a *Join Type* from the shortcut menu.

The Join Condition field automatically creates a Join if identical fields exist in both segments.

Defining Dimensions for OLAP Analysis

Synonyms can be modified to support Online Analytical Processing (OLAP). The Metadata canvas provides tools to create OLAP hierarchies and dimensions. OLAP enables you to drill down or roll up on hierarchical data, pivot fields from columns to rows (or vice versa), and slice-and-dice information by filtering or querying data sources based on specified criteria thresholds.

You OLAP-enable the Master File by using the Metadata canvas to create dimension(s) at the field level and associate fields with each dimension.

Note: OLAP is a reporting facility. It is not relevant to data maintenance projects.

Using the Dimension Builder in the Metadata Canvas Modeling View

The Dimension Builder enables you to create logical views based on enterprise data (relational or legacy data sources) for multidimensional analysis without manually editing metadata. The Dimension Builder works with relational and non-relational data sources. You can enable the Dimension Builder by selecting *Dimension Builder* from the toolbar or the Tools menu.

Procedure: How to Add a Parent/Child Hierarchy

1. From the Metadata canvas, click the *Modeling View* tab.

2. Click the *Dimension Builder* icon  on the toolbar.

The Dimension Builder opens.

3. Click the *Parent/Child Hierarchy* icon  from the Dimension Builder toolbar.

The Mandatory Properties for Parent/Child Hierarchy dialog box opens.

4. Select a field from the Field Tree and click *Assign* to assign a Unique ID for the hierarchy.
5. Repeat step 4 for the Caption and Parent Of hierarchy properties.
6. Click *OK* to close the Mandatory Properties for Parent/Child Hierarchy dialog box.

The Mandatory Properties are added to the Dimension Builder.

7. Use the right-click menu to rename the dimension, view properties, or view sample data for the dimension.
8. Click *Save* from the File menu to save the dimension.

Procedure: How to Delete a Dimension

To delete a dimension, right-click a dimension and select *Delete*, or click the *Delete* button from the Dimension Builder toolbar.

Procedure: How to Add Levels to the Hierarchy

This process enables you to edit an existing Master File, add tables (for non-WebFOCUS Master Files), and create and modify dimensions.

1. From the Metadata canvas, click the *Modeling View* tab.
2. Select the *Levels Hierarchy* button from the Dimension Builder toolbar.

A level is added to the hierarchy. Use the right-click menu to rename the dimension or keep the default name.


3. Drag the selected fields from a segment into the Dimension Builder hierarchy folder.
4. Click *Save* from the *File* menu to save the dimension.

The dimension is saved and stored in the Master File.

Building Logical Views of Your Data

The Dimension Builder enables you to create logical views based on enterprise data (relational or legacy data sources) for multidimensional analysis without manually editing metadata. You can enable the Dimension Builder by selecting *Dimension Builder* from the *Tools* group.

Procedure: How to Add a Parent/Child Hierarchy

1. From the Metadata canvas, click the *Modeling View* tab.
2. Click the *Dimension Builder* icon  from the *Tools* group.

The Dimension Builder opens.

3. Click the *Parent/Child Hierarchy* icon  from the Dimension Builder toolbar.

The Mandatory Properties for Parent/Child Hierarchy dialog box opens.

4. Select a field from the Field Tree and click *Assign* to assign a Unique ID for the hierarchy.
5. Repeat step 4 for the Caption and Parent hierarchy properties.

- Click *OK* to close the Mandatory Properties for Parent/Child Hierarchy dialog box.

The Mandatory Properties are added to the Dimension Builder.

- Use the right-click menu to rename the dimension, view properties, or view sample data for the dimension.

Procedure: How to Delete a Dimension

To delete a dimension, right-click a dimension and select *Delete*, or click the *Delete* button from the Dimension Builder toolbar.

Procedure: How to Add Levels to the Hierarchy

This process enables you to edit an existing Master File, add tables (for non-WebFOCUS Master Files), and create and modify dimensions.

- From the Synonym Editor, click the *Modeling View* tab.

- Select the *Levels Hierarchy* button from the Dimension Builder toolbar.





A level is added to the hierarchy. Use the right-click menu to rename the dimension or keep the default name.


- Drag the selected fields from a segment into the Dimension Builder hierarchy folder.

You may also drag the fields to and from other hierarchies using the Dimension Builder.

Reference: Dimension Builder Panel Toolbar

You can access the following commands from the Dimension Builder toolbar.

Button	Definition
	Adds a level hierarchy.
	Enables you to create a parent/child hierarchy and assign mandatory properties for the hierarchy.
	Deletes the selected item.
	Enables you to view and refresh sample data for the selected field.

Button	Definition
	Enables you to edit a hierarchy.

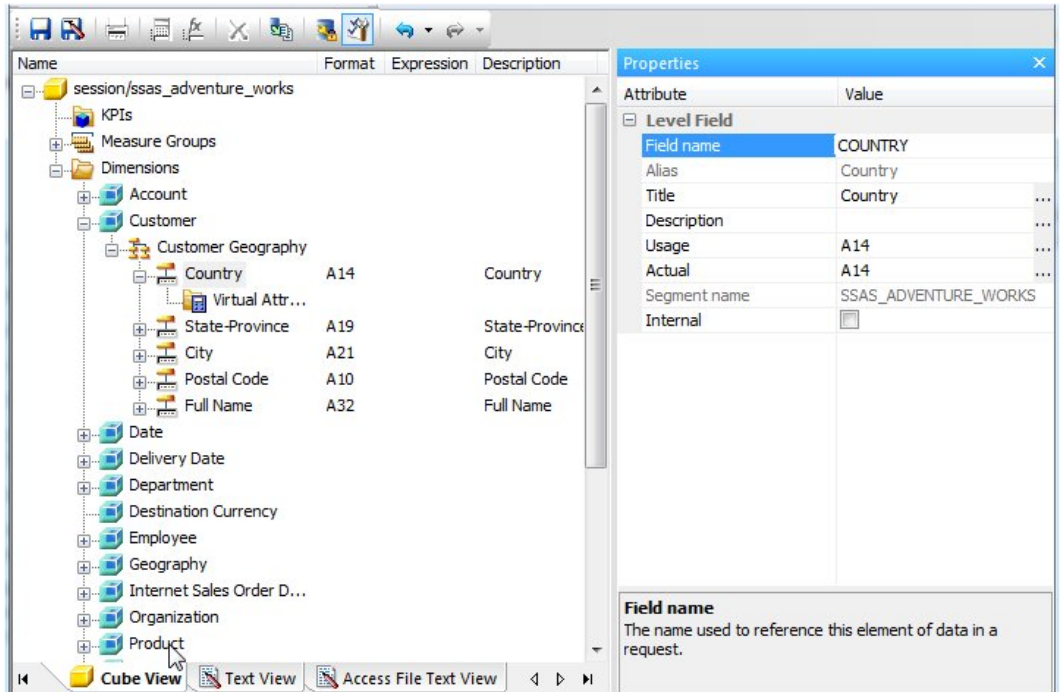
Creating a Synonym for Cube Data Sources

The Metadata canvas enables you to make further modifications to your Cube synonym definitions. The Cube synonym is displayed in the Cube View tab. If you select a component of the synonym, its properties appear in the Properties panel.

You can use the Metadata canvas to:

- ☐ Edit field names and titles for measures, properties, and variables. You may also edit the field prefix for the defined fields.
- ☐ Edit titles for multiple languages, delete titles, and add titles for additional languages if you are using code page UTF-8.
- ☐ Delete measures, dimensions, or parent/child hierarchies.
- ☐ View the USAGE and ACTUAL formats and change the USAGE display format for the field.
- ☐ Change an internal attribute value.
- ☐ Change the access property for variables.
- ☐ Change the field prefix used to create the field names, mandatory property names, and DEFINE field names generated for parent/child hierarchies by the Synonym Wizard.
- ☐ Create virtual measures (this is implemented with COMPUTE fields in the Master File).

The following image is an example of a Cube data source in the Metadata canvas.



Procedure: How to Edit Field Names and Titles

To edit field names and titles:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Cube Master File from the Master Files folder.

Note: You may also right-click the synonym and select *Edit in Synonym Editor*.

By default, the Metadata canvas opens to the last view used.

2. Select an attribute from the Cube View tab.

Note: The attributes available depend on the type of synonym.

3. Click *FIELD NAME*, *TITLE*, or *CAPTION* on the right-hand side of the workspace.

Note: The Properties panel does not let you make any changes that would render the Master File unusable. Therefore, you cannot edit any value field that is highlighted gray.

4. Manually edit the Field Name, Title, or Caption by typing in the value field.
The edits are updated instantaneously in the Cube View tab.
5. Click *Save* to save the synonym.

Procedure: How to Edit Titles for Multiple Languages

To edit the title for multiple languages:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Cube Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Select an attribute from the Cube View tab.
3. Click the browse (...) button, located on the far right of the *TITLE* or *CAPTION* value field.
The Multilingual Titles dialog box opens.
4. You may add, edit, or delete a title for this field.

To add an additional language for the title:

- a. Select a language from the drop-down list.
- b. Click *Add*.
- c. Type a description for the title field.

To edit an existing specified title:

- a. Select the title and click *Edit*.
You may also double-click the title.

- b. Manually type a title name.

To delete a specified title:

- a. Select the title and language to be deleted.
 - b. Click *Delete*.
5. Click *OK* to close the Multilingual Titles dialog box.

6. Click Save from the File menu to save the synonym.

Procedure: How to Delete Measures, Dimensions, or Parent/Child Hierarchies

To delete measures, dimensions, or parent/child hierarchies:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Cube Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Select the attribute name that you want to delete.
3. Right-click and select *Delete* from the shortcut menu.

The attribute is deleted from the Cube View tab.

4. Click Save to save the synonym.

Procedure: How to Create Virtual Measures With COMPUTE Fields

To create virtual measures with COMPUTE fields:

1. From the Projects or Data Servers area, open a synonym by double-clicking a Cube Master File from the Master Files folder.

By default, the Metadata canvas opens to the last view used.

2. Open the *Measures* folder from the Cube View tab.

3. Right-click the *Virtual Measures* folder, select *Insert*, and then *Virtual Measure*.

The Compute Calculator opens.

4. From the Compute Calculator, type a name for the column in the *Name* field.
5. You may type a descriptive title for the measure (COMPUTE) in the *Title* field.
6. Use the Expression tab and the calculator buttons to build the expression for the Measure (COMPUTE field).

or

Use the Relational Expression tab to build the expression.

- a. From the Relational Expression tab, click the *Add New Row* button.
- b. Use the drop-down lists to select the Field, Relation, and Type.

Note: Parameters are not supported.

- c. Click the browse (...) button at the right of the Value input field.

The Value Selection dialog box opens.

- d. Select from the available values and use the arrows to add or remove values.
- e. Click *OK* to close the Value Selection dialog box and return to the Relational Expression tab.

The expression is added to the virtual measure.

- f. To add another expression, double-click a measure or dimension from the Fields/Variables tab on the right side of the Compute Calculator.

The expression is added to the Relational Expression tab, where you can add the expression value.

- g. To delete an expression, select the number or field column of the expression and click the *Delete* button, or right-click it and select *Delete selected row(s)*. The expression is removed from the Relational Expression tab.

7. You may click the Check expression and Sample Data buttons, located on the top right of the Compute Calculator, to verify that the expression is valid and to view sample data for the filter.
8. Click *OK* to close the Compute Calculator and return to the Metadata canvas.

Note: To edit the Compute, Title, or Expression, you may do so directly from the Metadata canvas or you may click the browse (...) button at the right of the EXPRESSION value field to relaunch the Compute Calculator.

Defining a Business View of a Master File

By defining a Business View of a Master File, you are creating an alternative view of the Master File and can limit the fields available or create a subset of fields from the original Master File. Fields can be grouped into meaningful folders. Field names, titles, and descriptions can be customized for each Business View.

Fields in a Business View are organized into folders. Each folder contains a group of fields. The fields in a folder can come from different segments in the original Master File. The Business View may contain existing fields and can include existing custom fields for DEFINE, COMPUTE, and Filters. Custom fields are associated with a specific segment in the original Master File and are subject to the same rules as real fields. A report can reference fields from multiple folders if they all lie along a single path in the original Master File.

When opening a Master File in the Synonym Editor and clicking the Business View button on the toolbar, a Business View pane opens inside the Synonym Editor where Business View attributes can be added. Adding Business View attributes at this point would update the Master File by inserting the Business View attributes at the end of the file, and once the file is saved, the Business View becomes the active view when the file is used for reporting.

If you do not wish to turn your Master File into a Business View, it is recommended that you save the Business View using a different name or preferably start by creating a new Master File by selecting *New*, then *Synonym via Metadata Canvas*. Then, insert a reference to an existing synonym and continue to build the Business View. In this case, the Business View points to the cross-referenced Master File, and all of the actual fields and security information comes from the referenced file when the Business View is used in WebFOCUS tools (such as Joins and Defines) and in reports.

You may create a Business View for an existing Master File by using the Synonym Editor.

Procedure: How to Create a Business View Using the Metadata Canvas

1. From the Content group, click *Data* and then click *Synonym via Metadata Canvas*. Select a Master File and click *OK*.
2. Right-click a segment, select *Insert*, and then *Reference to Existing Synonym*.
3. From the Insert Reference to Existing Synonym dialog box, select the synonym for which you want to create a Business View.

The referenced file is added to the new synonym and its fields are visible in the left frame.

4. Select *Business View* from the Tools group to open the Business View panel.

Note: A Business View Master File may contain only one root folder.

Tip: Right-click a node in Business View and select *Properties* to open the Properties panel and view additional information for items selected in the Business View pane. Use the Properties pane to change titles, descriptions, or field names. Items that cannot be edited are grayed out.

5. In the Business View panel, right-click the file name and select *Create Default Business View* or *New Folder*.

The *Create Default Business View* option duplicates the segments and fields that are available in the Master File. You can reorganize the view as necessary. The *New Folder* option creates a root folder to which you can add fields from the Master File on the left pane by selecting them and then dragging them inside the folder. You can create additional folders to create the structure you want.

6. To add additional folders for the Business View, right-click the Business View root folder that was created in the Business View pane and select *New Folder*.

Note: Multiple subfolders can be created and folders may be empty for organizational purposes.

7. Select fields from the Master File on the left and drag them to the appropriate folder in the Business View pane. Press the Shift or Ctrl key while selecting multiple fields.

Note: If needed, fields may be duplicated by placing them in multiple folders, but any given folder may contain a field only once.

The selected fields appear in the Business View pane.

Reference: Usage Notes for Business Views

- ❑ When creating a Business View using a referenced Master File:
 - ❑ The detailed information about fields, such as USAGE and ACTUAL formats or indexes remain in the referenced Master File.
 - ❑ All information about Cluster Master Files remain in the referenced Master File.

- ❑ DBA attributes specified in the referenced Master File are respected by the Business Views
- ❑ When a Master File contains more than one field with the same name, as can occur when files are joined, the BELONGS_TO_SEGMENT attribute identifies which instance of the field name is being referenced in the Business View.
- ❑ Folders can be empty for organizational purposes. For example, Region can have empty folders called North, South, East, and West.
- ❑ You can issue an SQL SELECT command against a Business View. However, a Direct SQL Passthru request is not supported against a Business View.
- ❑ Business Views support alternate file views and fully qualified field names.
- ❑ The SEG. operator against a Business View folder displays all of the fields in that folder, not all of the fields in the real segment.
- ❑ Requests against a Business View cannot reference any fields or segments not in the Business View.
- ❑ All HOLD formats are supported against a Business View.
- ❑ All adapters for non-WebFOCUS data sources support retrieval requests against a Business View.
- ❑ Business Views are not supported with data source maintenance commands, such as Maintain or REBUILD.
- ❑ The referenced Master File or the Master File currently being used to create the Business View, may contain Defines, Computes, Filters, and other fields for use in the Business View.

Reference: Using a Business View Master File

When you use the Business View Master File with WebFOCUS tools and reports, the field formats, descriptions, and titles will be retrieved from the original Master File, unless they are customized and a title and description is available through the Business View.

The Table List shows all available Master Files, including the Business Views, that are available. The Remarks column shows a description from the original Master File unless the Business View file contains its own remarks.

Applying Database Administrator (DBA) Security

You can secure Master Files on a file-by-file basis. For each data source, security can be maintained at two different levels.


- ❑ **Database Administrator Level.** You specify the Database Administrator (DBA) password for the data source. The DBA has unlimited access to the Master File and data source and can set up or change security restrictions for individual users. Only the Database Administrator can encrypt or decrypt a data source.
- ❑ **User Level.** You specify user passwords for the data source. A user password identifies a user who has access to that data source. When you specify a user password, you must also set at least the type of file access: read, write, read/write, or update. Security for each user can be further limited by restricting access to segments, fields, or field values. For more information, see [Limiting Data Source Access: The RESTRICT Attribute](#) on page 233. Once a user password has been established, you can apply the same restrictions to multiple users. For more information, see [Applying Security Restrictions for Multiple Users](#) on page 228.

Note: You cannot specify a Database Administrator (DBA) password during the Create Synonym process. You must use the Metadata canvas.

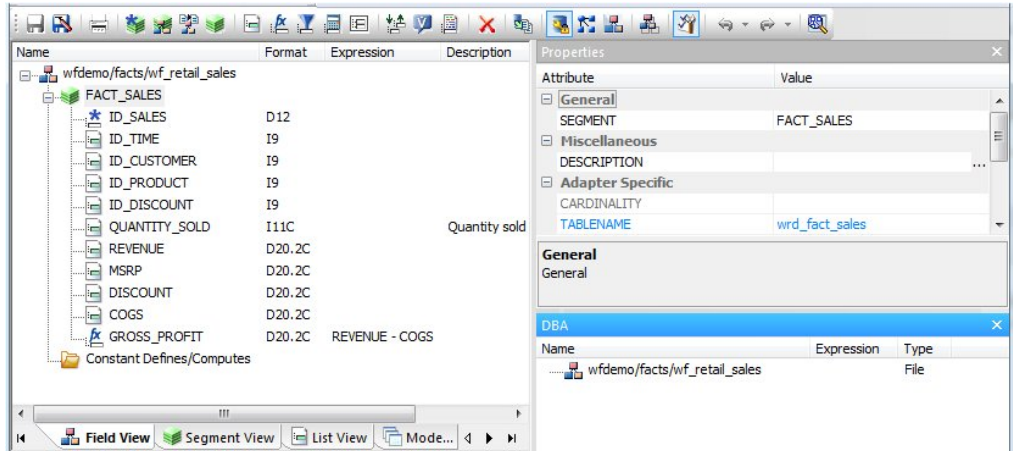
When security is specified, the Database Administrator or user must enter a password to get access to the data source. When the user no longer needs access to the data source, you can delete their security.

Before adding any type of security to a data source, the Database Administrator must be aware of certain DBA guidelines. See [DBA Guidelines](#) on page 226.

Procedure: How to Set Up Security for the Database Administrator

1. In the Metadata canvas, click *DBA* from the Tools menu or click the *DBA* button  from the Synonym toolbar.

The DBA pane opens, as shown in the following image.



Note: The DBA pane is available from the Field View, Segment View, List View, and Modeling View tabs.

2. Right-click the file name in the DBA window and select *Insert*, then *DBA*.

A default DBA password will be created for the Master File. You can change this value, delete it, add users to specify file restrictions, or add file names to specify data source-specific restrictions to the current data source. You can also specify a separate DBA file that contains DBA security restrictions.

Note: When the password is created and the cursor is in that field, you can right-click and use the edit options to undo, select all, cut, copy, paste, or delete the password.

Procedure: How to Set Up Security for a User

1. In the DBA pane, right-click the DBA icon to insert user restrictions or specify a DBA file.
2. Once you add a user, you can continue to insert file access restrictions by right-clicking the user field and selecting *Insert*.
3. Select the type of access: Read, Write, Read/Write, or Update.

4. Specify the type of restriction for each option: Restriction to Field, Value, Segment, Noprint, or Same Restriction.

Note: The Same Restriction option is activated when there are multiple users.

5. Click OK to save the Master File with the user password and restrictions.

Note: To add WebFOCUS language security declarations to the Master File using the Text Editor, see [Implementing DBA Security Using WebFOCUS Language](#) on page 230.

Reference: DBA Guidelines

You can ensure that the security restrictions you place on Master Files are correct by adhering to the following guidelines:

- ☐ Every file with access limits must have a DBA password.
- ☐ No segment, field, or field value restrictions may be specified at the Database Administrator level. The Database Administrator must have unlimited access to the data source and all cross-referenced data sources.
- ☐ Once security restrictions have been applied, the Database Administrator should conduct thorough testing of every restriction before the data source is used. It is particularly important to check field values to make sure they do not contain errors. If they are in error, user access to the field data will be unnecessarily restricted.
- ☐ All groups of cross-referenced data sources should have the same security restrictions.
- ☐ You must have a DBA password to encrypt and decrypt or restrict existing data sources.
- ☐ The Database Administrator can change any type of security restriction.
- ☐ Access levels affect the fields users can access. The Database Administrator must consider what commands each user will need. If a user does not have access rights, that user will receive a message.

Reference: DBA Pane

The following options are available from the DBA pane when the DBA password is selected.

DBA password

By default, the DBA password is the same as the user ID used to connect to the Reporting Server. Using the Rename option from the DBA password shortcut menu, you may enter a different password of up to 64 characters. This is the password of the DBA who will be creating and maintaining the current data source. The DBA has full access to the data source and the corresponding Master File, controls the access rights of other users, and has encryption privileges. For more information, see [Encrypting and Decrypting a Master File](#) on page 229.

DBAFILE

Select the name of the Master File that contains your DBA security restrictions. Other Master Files can use the DBA security restrictions in this Master File.

Insert Filename

Enter the name of the Master File to which user security will be applied. This option is used to add data source-specific restrictions to the current data source. It includes a FILENAME attribute for the selected Master File. The FILENAME attribute in the referenced Master File must be the same as the FILENAME attribute in the DBA section of the current data source.

Insert Users

Enter the passwords (up to 64 characters) of users whose access rights will be granted for the current data source.

File Access

For user access, select one of the following options:

- ☐ Choose *Read Access* for full viewing rights.
- ☐ Choose *Write Access* to permit additions or changes to the data source.
- ☐ Choose *Read/Write Access* for both of the above.
- ☐ Choose *Update Access* to permit changes to field values.

Restrictions: Segment, Field, Value, Noprint, Same

When the file access is selected, continue to select the type of restriction you wish to apply.

- ☐ Choose *Segment* to grant access to individual segments.
- ☐ Choose *Field* to grant access to individual fields.

- ☐ Choose *Value* to limit access to values that meet a test condition.
- ☐ Choose *Noprint* to specify fields you do not want to display in a report.
- ☐ Choose *Same* to apply the same restrictions as other users that are already set up.

Applying Security Restrictions for Multiple Users

You can specify restrictions for one user and apply the same restrictions to other users. This helps when you want to set the same restrictions for a group of users.

Procedure: How to Apply Previously Defined Restrictions to Another User

1. In the DBA pane, right-click the DBA password and select *Insert*, then *User*.
2. Right-click the newly added user and select *Insert* to specify the desired type of access restriction you would like to apply.

Available access types are Read Access, Write Access, Read/Write Access, and Update Access.

3. Right-click an access type and select *Insert*, then *Same Restriction*.

Note: The Same Restriction option is only available when there are multiple users. A drop-down combo box is activated in the Properties panel with a NAME attribute.

4. Click the arrow on the drop-down combo box next to the NAME attribute in the Properties panel, and then select the user with the security restrictions that would apply to the new user.

Security restrictions from the user selected in the drop-down combo box are applied to the new user. You can apply the security restrictions to other users by repeating steps 1 to 4.

Note: You must have created at least one user security restriction to apply security restrictions to multiple users.

Deleting a DBA or User Password

The DBA can delete a DBA password or security for a user when it is no longer needed.

Procedure: How to Delete a User Password

1. On the DBA pane, select the user password you wish to delete.
2. Right-click and select *Delete* or press *Delete* on the keyboard.

If you delete the user based upon whom you have assigned security restrictions for other users, you must reset security restrictions for all users attached to the user you deleted.

Procedure: How to Delete a DBA Password

Deleting a DBA password will delete all user security for that data source.

On the DBA pane select the DBA password, then right-click and select *Delete* or press *Delete* on the keyboard.

All security information is removed.


Encrypting and Decrypting a Master File

The DBA may use the Encrypt and Decrypt attributes from the Metadata canvas to scramble and unscramble some or all of the contents of a data source. When you encrypt Master Files, they are secure from unauthorized examination.

Encryption at the data source level scrambles the entire contents of that Master File so it is unreadable. When you encrypt a Master File, you can decrypt it. Decrypting unscrambles the contents to its readable state.

Before you can encrypt or decrypt any Master File, you must specify the DBA password. If you do not specify a DBA password, you will not be able to encrypt or decrypt the file.

Procedure: How to Encrypt a Master File

1. In the Metadata canvas, select *DBA* from the Tools menu or click the *DBA* button  from the Synonym toolbar.

The DBA pane opens.

2. Create and save the Master File with the DBA password.
3. From the Metadata canvas Field View tab, select a segment from the Master File hierarchy (left pane).

The values for the selected segment appear in the Properties panel on the right.

4. Select the *ENCRYPT* check box.
5. Click *Save* from the File menu to encrypt the Master File.

Procedure: How to Decrypt a Master File

1. At the encrypted segment level in the Master File hierarchy, clear the *ENCRYPT* attribute.

2. Click Save from the File menu to decrypt the Master File.

Implementing DBA Security Using WebFOCUS Language

The declarations (called security declarations) follow the END command in a Master File and tell WebFOCUS that security is needed for the data source and what type of security is needed. The word END on a line by itself in the Master File terminates the segment and field attributes and indicates that the access limits follow. If you place the word END in a Master File, it must be followed by at least a DBA attribute. Each security declaration consists of one or several of the following attributes:

- ❑ The DBA attribute gives the name or password of the Database Administrator for the data source. The Database Administrator has unlimited access to the data source and its Master File.
- ❑ The USER attribute identifies a user as a legitimate user of the data source. Only users whose name or password is specified in the Master File of a WebFOCUS data source with security placed on it have access to that data source.
- ❑ The ACCESS attribute defines the type of access a given user has. The four types of access available are:
 - RW, which allows a user to both read and write to a data source.
 - R, which allows a user only to read data in a data source.
 - W, which allows a user to only write new segment instances to a data source.
 - U, which allows a user only to update records in a data source.
- ❑ The RESTRICT attribute specifies certain segments or fields to which the user is not granted access. It can also be used to restrict the data values a user can see or perform transactions on.
- ❑ The NAME and VALUE attributes are part of the RESTRICT declaration.

Describe your data source security by specifying values for these attributes in a comma-delimited format, just as you specify any other attribute in the Master File.

Example: Implementing DBA Security in a Master File

The following is a Master File that uses security features:

```

FILENAME = PERS, SUFFIX = FOC,$
SEGMENT = IDSEG, SEGTYPE = S1,$
  FIELD = SSN           ,ALIAS = SSN      ,FORMAT = A9      ,$
  FIELD = FULLNAME      ,ALIAS = FNAME    ,FORMAT = A40     ,$
  FIELD = DIVISION      ,ALIAS = DIV      ,FORMAT = A8      ,$
SEGMENT=COMPSEG, PARENT=IDSEG, SEGTYPE=S1,$
  FIELD = SALARY        ,ALIAS = SAL      ,FORMAT = D8      ,$
  FIELD = DATE          ,ALIAS = DATE     ,FORMAT = YMD     ,$
  FIELD = INCREASE      ,ALIAS = INC      ,FORMAT = D6      ,$
END
DBA=JONES76,$
USER=TOM      ,ACCESS=RW, $
USER=BILL     ,ACCESS=R  ,RESTRICT=SEGMENT ,NAME=COMPSEG  ,$
USER=JOHN     ,ACCESS=R  ,RESTRICT=FIELD  ,NAME=SALARY   ,$
               ,NAME=INCREASE , $
USER=LARRY    ,ACCESS=U  ,RESTRICT=FIELD  ,NAME=SALARY   ,$
USER=TONY     ,ACCESS=R  ,RESTRICT=VALUE  ,NAME=IDSEG,
  VALUE=DIVISION EQ 'WEST' , $
USER=MARY     ,ACCESS=W  ,RESTRICT=VALUE  ,NAME=SALTEST ,
  VALUE=INCREASE+SALARY GE SALARY,$
               ,NAME=HISTTEST,
  VALUE=DIV NE ' ' AND DATE GT 0,$

```

Identifying the DBA: The DBA Attribute

The first security attribute should be a password that identifies the Database Administrator. This password can be up to 64 characters long and, by default, is not case-sensitive. It can include special characters. If the DBA password contains blanks, it must be enclosed in single quotation marks. Since nothing else is needed, this line is terminated by the usual delimiter (,\$).

Example: Identifying the DBA Using the DBA Attribute

```
DBA=JONES76,$
```

Identifying Users With Access Rights: The USER Attribute

The USER attribute is a password that identifies the users who have access to the data source. A USER attribute cannot be specified alone. It must be followed by at least one ACCESS restriction (discussed in [Specifying an Access Type: The ACCESS Attribute](#) on page 232) to specify what sort of ACCESS the user is granted.

Before using a secured data source, a user must enter the password using the SET PASS or SET USER command. If that password is not included in the Master File, the user is denied access to the data source. When the user does not have a password, or has one that is inadequate for the type of access requested, a message appears.

Syntax: **How to Set the USER Attribute**

Any user whose name or password is not declared in the Master File is denied access to that data source. The syntax of the USER attribute is

```
USER = name
```

where:

name

Is a password of up to 64 characters for the user. The password can include special characters and is not case-sensitive. If the password contains blanks, it must be enclosed in single quotation marks.

You can specify a blank password (default value if not previously changed). Such a password does not require the user to issue a SET PASS= command. A blank password may still have access limits and is convenient when a number of users have the same access rights.

Example: **Setting the USER Attribute**

```
USER=TOM, . . .
```

An example of setting a user password to blank, and access to read only follows:

```
USER= , ACCESS=R,$
```

Establishing User Identity

A user must enter his or her password before using any WebFOCUS data source that has security specified for it. A single user may have different passwords in different files. For example, in file ONE, the rights of password BILL apply, but in file TWO, the rights of password LARRY apply. Use the SET PASS command to establish the passwords.

Specifying an Access Type: The ACCESS Attribute

The ACCESS attribute specifies what sort of access a user is granted. Every security declaration, except the DBA declaration, must have a USER attribute and an ACCESS attribute.

The following is a complete security declaration, consisting of a USER attribute and an ACCESS attribute.

```
USER=TOM, ACCESS=RW,$
```

This declaration gives Tom read and write (for adding new segment instances) access to the data source.

Access levels affect what kind of commands a user can issue. Before you decide what access levels to assign to a user, consider what commands that user will need. If a user does not have sufficient access rights to use a given command, a message appears.

ACCESS levels determine what a user can do to the data source. Use the RESTRICT attribute (discussed in [Limiting Data Source Access: The RESTRICT Attribute](#) on page 233) to limit the fields, values, or segments to which a user has access. Every USER attribute must be assigned an ACCESS attribute. The RESTRICT attribute is optional. Without it, the user has unlimited access to fields and segments within the data source.

Limiting Data Source Access: The RESTRICT Attribute

The ACCESS attribute determines what a user can do with a data source.

The optional RESTRICT attribute further restricts a user access to certain fields, values, or segments.

The RESTRICT=VALUE attribute supports those criteria that are supported by the IF phrase. The RESTRICT=VALUE_WHERE attribute supports all criteria supported in a WHERE phrase, including comparison between fields and use of functions. The WHERE expression will be passed to a configured adapter when possible.

Syntax: How to Limit Data Source Access

```
...RESTRICT=level, NAME={name|SYSTEM} [,VALUE=test],$
```

or

```
...RESTRICT=VALUE_WHERE, NAME=name, VALUE=expression; ,$
```

where:

level

Can be one of the following:

- ❑ **FIELD**, which specifies that the user cannot access the fields named with the NAME parameter.

- ❑ **SEGMENT**, which specifies that the user cannot access the segments named with the NAME parameter.
- ❑ **SAME**, which specifies that the user has the same restrictions as the user named in the NAME parameter. No more than four nested SAME users are valid.
- ❑ **NOPRINT**, which specifies that the field named in the NAME or SEGMENT parameter can be mentioned in a request statement, but will not display. You can use a VALUE test to limit the restriction to values that satisfy an expression. For example, consider the following RESTRICT=NOPRINT declaration. User MARY can only display the IDs of those employees whose salaries are less than 10000.

```
USER=MARY      ,ACCESS=R      ,RESTRICT=NOPRINT  ,NAME=EMP_ID  ,
VALUE=CURR_SAL LT 10000;,$
```

name

Is the name of the field or segment to restrict. When used after NOPRINT, this can only be a field name. NAME=SYSTEM, which can only be used with value tests, restricts every segment in the data source, including descendant segments. Multiple fields or segments can be specified by issuing the RESTRICT attribute several times for one user.

Note: With value restrictions, NAME=segment restricts the named segment and any segment lower in the hierarchy, whether or not an alternate file view changes the retrieval view. This means that if a parent segment has a value restriction, and a join or alternate file view makes a child segment the new root, the value restriction on the original parent will still apply to the new root.

VALUE

Specifies that the user can have access to only those values that meet the test described in the *test* parameter.

test

Is the value test that the data must meet before the user can have access to it. The test is an expression supported in an IF phrase.

VALUE_WHERE

Specifies that the user can have access to only those values that meet the test described in the *expression* parameter.

expression;

Is the value test that the data must meet before the user can have access to it. The test is an expression supported in a WHERE phrase.

Note: The semicolon (;) is required.

Example: Limiting Data Source Access

```
USER=BILL ,ACCESS=R ,RESTRICT=SEGMENT ,NAME=COMPSEG,$
```

Placing Security Information in a Central Master File

The DBAFILE attribute enables you to place all passwords and restrictions for multiple Master Files in one central file. Each individual Master File points to this central control file. Groups of Master Files with the same DBA password may share a common DBAFILE which itself has the same DBA password.

There are several benefits to this technique, including:

- ❑ Passwords only have to be stored once when they are applicable to a group of data sources, simplifying password administration.
- ❑ Data sources with different user passwords can be JOINed. In addition, individual DBA information remains in effect for each data source in a JOIN.

The central DBAFILE is a standard Master File. Other Master Files can use the password and security restrictions listed in the central file by specifying its file name with the DBAFILE attribute.

Syntax: How to Place Security Attributes in a Central Master File

```
END
DBA=dbaname, DBAFILE=filename , $
```

where:

dbaname

Is the same as the dbaname in the central file.

filename

Is the name of the central file.

You can specify passwords and restrictions in a DBAFILE that apply to every Master File that points to that DBAFILE. You can also include passwords and restrictions for specific Master Files by including FILENAME attributes in the DBAFILE.

Hiding Restriction Rules: The ENCRYPT Command

Since the restriction information for a WebFOCUS data source is stored in its Master File, encrypt the Master File in order to prevent users from examining the restriction rules. Only the Database Administrator can encrypt a description. You must set PASS=DBAname before you issue the ENCRYPT command.

Syntax: How to Hide Restriction Rules: ENCRYPT Command

```
ENCRYPT FILE filename
```

where:

filename

Is the name of the file to be encrypted.

Example: Encrypting and Decrypting a Master File

The following is an example of the complete procedure:

```
SET PASS=JONES76  
ENCRYPT FILE PERS
```

The process can be reversed in order to change the restrictions. The command to restore the description to a readable form is DECRYPT.

The DBA password must be issued with the SET command before the file can be decrypted. For example:

```
SET PASS=JONES76  
DECRYPT FILE PERS
```

Encrypting Data

You may also use the ENCRYPT parameter within the Master File to encrypt some or all of its segments.

Encryption takes place on the segment level. That is, the entire segment is encrypted. The request for encryption is made in the Master File by setting the attribute ENCRYPT to ON.

Example: Encrypting Data

```
SEGMENT=COMPSEG, PARENT=IDSEG, SEGTYPE=S1, ENCRYPT=ON,$
```


You must specify the ENCRYPT parameter before entering any data in the data source. The message NEW FILE... must appear when the encryption is first requested. Encryption cannot be requested later by a change to the Master File and cannot be removed after it has been requested or any data has been entered in the data source.

Analyzing Procedures Using Impact Analysis

You can use Impact Analysis to generate a report that identifies the procedures that access a specific Master File or field within a Master File. Impact Analysis helps you analyze the potential impact of modifying or deleting Master Files or fields and enables you to analyze data, control search criteria, save reports, and interactively open and edit procedures based on search results.

Impact Analysis searches Business Views in addition to WebFOCUS procedures. This enables you to see if changes in the original Master File will impact fields used in the Business View.

Impact Analysis is accessible from the Content and Data Servers development areas of the Configured Environments tree.

Note: You can launch Impact Analysis from the Configured Environments tree or from the Metadata canvas. When Impact Analysis is launched from the Metadata canvas, it searches files based on the application path of the Reporting Server. From the Configured Environments tree, it enables you to select applications or folders to be searched.

Procedure: How to Use Impact Analysis From the Configured Environments Tree

1. You can use Impact Analysis from the Configured Environments tree in the following ways:
 - ❑ From the Data Servers area, expand an application, right-click a Master File, and then click *Impact Analysis* from the shortcut menu.
 - ❑ From the Content area, right-click a folder and then click *Impact Analysis* to limit the search to the selected folder and its subfolders.
 - ❑ Right-click the *Content* node and then click *Impact Analysis* to search all folders within that node.

The Impact Analysis canvas opens with the New Report tab displaying the selected Master File Name and default Search Paths.

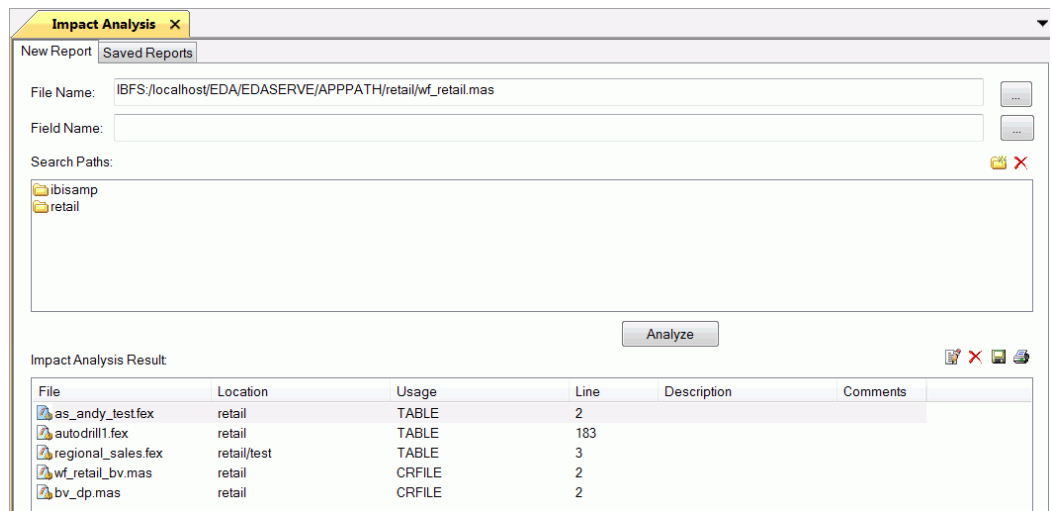
2. To search for all procedures that access a specific Master File or field, perform one of the following:
 - ❑ **Selected Master File.** The Master File you selected when opening the canvas will be searched by default. Proceed to step 3.

- ❑ **Different Master File.** Click the ellipsis button (...) to the right of the File Name search field and select a different Master File in the Select a Master File dialog box that opens.
 - ❑ **Single Field Within a Master File.** After you select the desired Master File, click the ellipsis button (...) to the right of the Field Name search field and double-click a field name in the Master File shortcut menu.
3. Optionally, to search for procedures in directory paths not listed by default in the Search Paths pane, add more search paths by clicking the folder icon above the Search Paths area and selecting one or more folders in the Select Folder dialog box that opens.

Note: You can also delete search paths by highlighting a search path and clicking the *Delete* icon above the Search Paths area.

4. Click *Analyze* to display a report in the Impact Analysis Result pane.

The following image shows the New Report tab of the Impact Analysis canvas populated with File Name search criteria, multiple Search Paths, and a report displayed in the Impact Analysis Result pane.



You have options to edit procedures, delete a report item, export a report, and print the report.

Exported reports are XML-formatted, have an .IAR extension, and are saved in the following default directory (unless you specify a different location):

`drive:\ibi\AppStudioreleasenumber\bin`

5. Click the *Saved Reports* tab to access all previously created reports.

All Impact Analysis reports are automatically saved in the following XML-formatted file:

`drive:\ibi\AppStudioreleasenumbers\bin\IARepository.xml`

Information is appended to this file as new analysis reports are performed. You have options to view reports, import previously exported reports, and delete reports.

Note: You can select an Impact Analysis report and click the Report Description icon to display details of the report.

Creating Reports in WebFOCUS App Studio

Reports are the foundation of business intelligence and business analytics, enabling you to gain valuable insights and make improved business decisions. In App Studio, you can create and edit reports using the Report canvas. When you create a new report, you use the Report Wizard. In report mode, you can create and style simple or complex reports, add data to the Report canvas, and style that data creating a graphical representation of the report page. This allows you to view how the report displays at run time.

This topic provides an overview of reporting, the types of reports you can create with App Studio, how to launch the Report Wizard to create reports, and a sample GUI procedure, with its associated WebFOCUS syntax, that you can use to create each type of report. For information on the tabs and panels that are available when you are developing reports in the Report canvas, see [Accessing Reporting Components With the App Studio Ribbon](#) on page 311.

In this chapter:

- ❑ [Building Reports Overview](#)
 - ❑ [Creating a Simple or Complex Report](#)
 - ❑ [Launching the Report Wizard](#)
 - ❑ [Creating Reports Using the Report Wizard](#)
 - ❑ [Accessing the Precision Reports Canvas](#)
 - ❑ [Joining Data](#)
 - ❑ [Blending Data](#)
 - ❑ [Styling Reports](#)
 - ❑ [Detecting and Handling of Fan Traps and Chasm Traps](#)
 - ❑ [Accessing Reporting Components With the App Studio Ribbon](#)
 - ❑ [Reporting Syntax Summary](#)
-

Building Reports Overview

App Studio provides you with the toolset and resources you need to create, edit, and view reports online or offline. App Studio allows users from beginner to advanced skill levels to independently create their own reports or modify existing reports without writing complex code or requiring the assistance of IT staff. Once your reports are developed, you can add them to a reporting application that can be made available throughout your enterprise internally, externally to the field on mobile devices, or both. App Studio allows you to deploy, manage, and expand your reporting application as required.

Business intelligence reports are usually designed to answer such questions as:

- ❑ What happened in the first quarter of this year? How does it compare to the first quarter of last year?
- ❑ When is the best season to roll out our new inventory to our stores?
- ❑ How many products were sold in a given year, month, week, or day?
- ❑ Who was the best performing seller for these products?

Reports designed for business analytics can answer such questions as:

- ❑ Why did the southern region exceed third quarter revenue estimates?
- ❑ Will this event or result occur in the future?
- ❑ What will happen if we introduce a new product line in the Spring?
- ❑ What else does the data tell us that we never thought to ask?

Creating a Simple or Complex Report

Using App Studio, you can create the following report types using graphical tools or the WebFOCUS syntax:

- ❑ **Tabular report.** Displays information in rows and columns. This is the basic report type, incorporating the fundamental reporting concepts. Most of the other report formats build on these concepts. You can drill down or roll up data hierarchies, pivot fields from columns to rows (or vice versa), and separate information by filtering or querying data sources based on specified criteria or thresholds. You can also create drill through reports that contain a summary report and detail reports, where the detail reports contains all the detail data for designated fields in the summary report. You can display these reports in many different formats, including HTML, Excel®, PowerPoint, and PDF.

- ❑ **Active report.** Designed for offline analysis. When using an active report, you can interact with data, using analysis options similar to those found in an Excel workbook. Since no connection to a server is required to view the data or use the analysis options, you can save and use the report anywhere. Analysis options include filtering, sorting, charting, and much more.
- ❑ **Excel Compound and Table of Contents reports.** Provide a way to generate multiple worksheet reports using the XLSX output format. By default, each of the component reports from the compound report is placed in a new Excel worksheet. A Table of Contents report provides a way to generate a multiple worksheet report where a separate worksheet is generated for each value of the first sort field (BY) in the report.
- ❑ **Financial report.** Specifically designed to handle the task of creating, calculating, and presenting financially oriented data, such as balance sheets, consolidations, and budgets. You design the content of the report on a row-by-row basis using a field (called a FOR field) that identifies each row, such as an account field. Once you have created the FOR field, you can build these reports from the Matrix tab. This organization provides a number of advantages, including easily defined inter-row and inter-column calculations.
- ❑ **Precision report.** Gives you an additional set of tools that make it easy to control the precise placement of objects and data in the report output. For example, with a precision report, you can quickly create a layout that is perfectly aligned for a preprinted form (such as a Bill of Sale or a tax form) and that automatically breaks out one record per report page. You can convert an existing report into a precision report or you can create a new precision report.
- ❑ **SQL request.** You can retrieve information using the SQL reporting language, and can directly incorporate WebFOCUS formatting commands.

Launching the Report Wizard

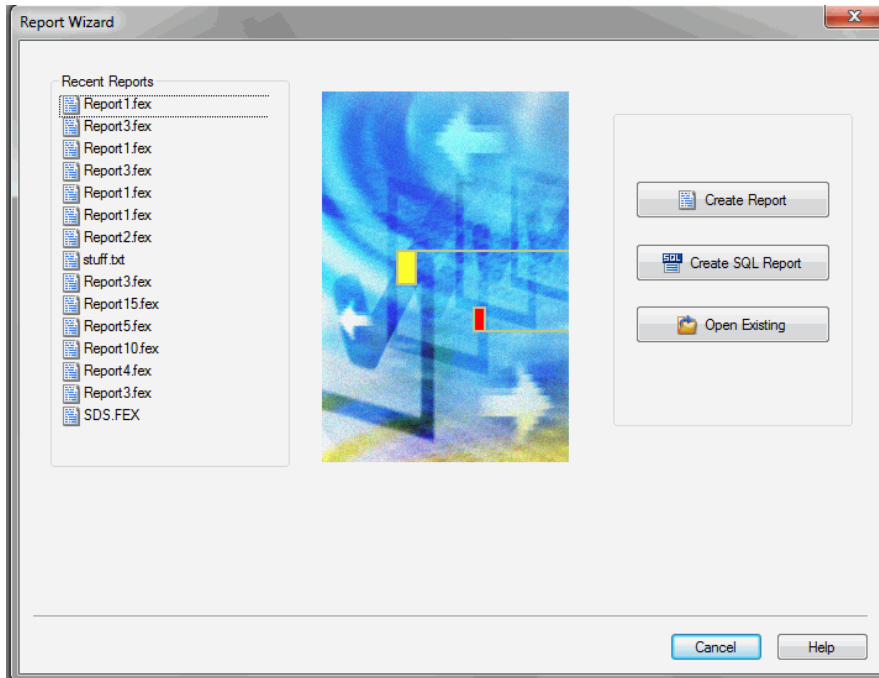
The Report Wizard allows you to create a new report procedure or SQL report procedure, and open an existing report.

To open the Report Wizard:

- ❑ On the Home tab, in the Content group, click *Report*.
- ❑ In the Environments Tree panel, right-click an application folder, point to *New*, and click *Report*.

Note: If you choose to create a new report using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Report Wizard. You will not have to specify whether you are creating a report or SQL report. You will instead be brought to the Select Data Source window, with the location for your report already selected.

The Report Wizard opens, as shown in the following image.



From the Report Wizard, you can create a new report or SQL report procedure or open a recent procedure.

Procedure: How to Create a Report Using the Report Wizard

After you launch the Report Wizard, you can begin to create your report procedure.

Note: If you choose to create a new report using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Report Wizard. You will not have to specify whether you are creating a report or SQL report. You will instead be brought to the Select Data Source window, with the location for your report already selected.

1. Click *Create Report*.
The Report Wizard - Select Procedure Location window opens.
2. Navigate to where you want to create the new report and click *Next*.
The Select Data Source window opens.

3. Choose an application folder in the application folder tree, and select a Master File in the Master files list. You can select the *Use Qualified Path* check box if you only want to display the data sources in the application folder and generate a qualified file name reference.
4. Optionally, click *Select Styling* to edit the style sheet for the report.
5. Click *Finish*.

The Report canvas and the Procedure View panel open.

6. Double-click fields in the Object Inspector, or drag them on to the canvas to add them to the report.
7. Format your report by using the options on the Report, Format, Data, Layout, Images, View, Field, and Appearance tabs.

Tip: The Field and Appearance tabs appear when you select a data column on the Report canvas.

8. To save your report, click *Save* on the Quick Access Toolbar, or click *Save* or *Save As* from the Application menu.
9. To run your report, click *Run* on the Quick Access Toolbar, or click *Run* from the Application menu.

Procedure: How to Create an SQL Report From an External .sql File

After you launch the Report Wizard, you can begin to create your SQL report procedure.

Note: If you choose to create a new SQL report using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Report Wizard. You will not have to specify whether you are creating a report or SQL report. You will instead be brought to the SQL Report Wizard - Welcome window.

1. Click *Create SQL Report*.

The Report Wizard - Choose location for the new SQL Report window opens.

2. Select a location for your SQL report and click *Next*.

The SQL Report Wizard - Welcome window opens.

3. Click the *Included from an external '.sql' file* option. This enables you to browse and select external procedures that exist in the repository of the project.
4. Click *Next*.

The SQL Report Wizard - Data access information window opens.

5. In the Select the SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your server configuration.
 - ☐ DB2
 - ☐ Microsoft SQL Server
 - ☐ Teradata CLI
 - ☐ Teradata ODBC
 - ☐ parAccel
 - ☐ Oracle
 - ☐ Sybase
 - ☐ DB2 for AS/400
 - ☐ SAP BW
 - ☐ Adabas
 - ☐ Allbase
 - ☐ Greenplum
6. In the Select connection area, choose a connection from the drop-down list generated from the engine you selected.
7. Click *Next*.

The SQL Report Wizard - Include external SQL file window opens.
8. Click *Browse* to select an external SQL file name or type the external SQL file name in the field.

Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. The default limit is 100.
9. Click *Next*. The SQL Report Wizard - Summary of SQL options window opens. Review your options and click *Next*, which opens the Report Wizard - SQL Data Source window.
10. Navigate to where you want to create the new procedure.
11. In the Enter a Procedure Name field, type a name for the SQL report.

Note: Typing a procedure name is not required to create a new report. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.

12. Click *Select Styling* if you want to edit the style sheet for the report.
13. Click *Finish*.

The Report canvas and the Procedure View panel open. You can now add data to your report and format the data using the tabs on the ribbon.

Procedure: How to Pass SQL Commands to the RDBMS Using SQL Passthru

After you launch the Report Wizard, you can begin to create your SQL report procedure.

Note: If you choose to create a new SQL report using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Report Wizard. You will not have to specify whether you are creating a report or SQL report. You will instead be brought to the *Report Wizard - Choose location for the new SQL Report* window, with the location for your report already selected.

1. Click *Create SQL Report*.

The Report Wizard - Choose location for the new SQL Report window opens.

2. Select a location for your SQL report and click *Next*.

The SQL Report Wizard - Welcome window opens.

3. Click *Type SQL statements in the report request*. This enables you to type SQL commands that will be passed on to the RDBMS with the SQL Passthru feature.
4. Click *Next*.

The SQL Report Wizard - Data access information window opens.

5. In the Select the SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your server configuration.

- ☐ DB2
- ☐ Microsoft SQL Server
- ☐ Teradata CLI
- ☐ Teradata ODBC

- ☐ parAccel
- ☐ Oracle
- ☐ Sybase
- ☐ DB2 for AS/400
- ☐ SAP BW
- ☐ Adabas
- ☐ Allbase
- ☐ Greenplum

6. In the Select the connection area, choose a connection from the drop-down list generated from the engine you selected.
7. Click *Next*.

The SQL Report Wizard - Enter SQL statements window opens.

8. In the field box, type the SQL statements you want to pass to the RDBMS.
Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected, so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. The default limit is 100.
9. Click *Next*.

The SQL Report Wizard - Summary of SQL options window opens.

10. Review your options and click *Next*.
The Report Wizard - SQL Data Source window opens.
11. Navigate to where you want to create the new procedure.
12. In the Enter a Procedure Name field, type a name for the SQL report.

Note: Typing a procedure name is not required to create a new report. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.

13. Click *Select Styling* if you want to edit the style sheet for the report.
14. Click *Finish*.

The Report canvas and the Procedure View panel open. You can now add data to your report and format the data using the tabs on the ribbon.

Procedure: How to Import SQL Commands From an Existing .sql File

You can import commands from existing .sql files.

Note: If you choose to create a new SQL report using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Report Wizard. You will not have to specify whether you are creating a report or SQL report. You will instead be brought to the *Report Wizard - Choose location for the new SQL Report* window, with the location for your report already selected.

1. Click *Create SQL Report*.

The Report Wizard - Choose location for the new SQL Report window opens.

2. Select a location for your SQL report and click *Next*.

The SQL Report Wizard - Welcome window opens.

3. Click *Import from an existing '.sql' file* and click *Next*. This enables you to modify SQL code after importing it from an external file to the procedure being built. You can modify the request using bits of the code.

The SQL Report - Data access information window opens.

4. In the Select SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your server configuration.

- ☐ DB2
- ☐ Microsoft SQL Server
- ☐ Teradata CLI
- ☐ Teradata ODBC
- ☐ parAccel
- ☐ Oracle
- ☐ Sybase
- ☐ DB2 for AS/400
- ☐ SAP BW

- ☐ Adabas
- ☐ Allbase
- ☐ Greenplum

5. In the Select the connection area, choose a connection from the drop-down list generated from the engine you selected.
6. Click *Next*.

The SQL Report Wizard - Import external SQL file window opens.

7. Type the SQL file name that you want to import or click *Browse* to select it.

Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected, so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. The default limit is 100. You can edit these options here or in the next step.

8. Click *Next*.

The SQL Report Wizard - Enter SQL statements window opens.

9. In the field box, type the SQL statements you want to pass to the RDBMS.
10. Click *Next*.

The SQL Report Wizard - Summary of SQL options window opens.

11. Review your options and click *Next*.

The Report Wizard - SQL Data Source window opens.

12. Navigate to where you want to create the new procedure.
13. In the Enter a Procedure Name field, type a name for the SQL report.

Note: Typing a procedure name is not required to create a new report. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.

14. Click *Select Styling* if you want to edit the style sheet for the report.
15. Click *Finish*.

The Report canvas and the Procedure View panel open. You can now add data to your report and format the data using the tabs on the ribbon.

Creating Reports Using the Report Wizard

When you make selections in the Report Wizard, simple English-like WebFOCUS syntax is generated to produce the report output. This section illustrates the simplicity of the user-friendly WebFOCUS syntax. For a summary of WebFOCUS reporting syntax, see [Reporting Syntax Summary](#) on page 401.

Creating a Tabular Report

The following image shows a tabular report, which displays cost of goods and revenue sorted across brand types and by product category, creating a matrix report. When you include both BY and ACROSS sort phrases in a report request, information is sorted vertically and horizontally, turning the report into a matrix of information that you read like a grid. A matrix report can have multiple BY and ACROSS sort fields.

<i>Cost and Revenue</i>				
Product Category	Brand Type			
	Major Brand		Specialty Brand	
	Cost of Goods	Revenue	Cost of Goods	Revenue
Accessories	\$10,180,257.00	\$20,077,815.96	\$79,573,641.00	\$109,530,522.57
Camcorder	\$104,866,857.00	\$154,465,702.24	N/A	N/A
Computers	\$69,807,664.00	\$103,316,482.12	N/A	N/A
Media Player	\$184,945,460.00	\$238,633,342.22	\$5,295,021.00	\$7,439,717.14
Stereo Systems	\$96,501,195.00	\$144,766,864.83	\$108,612,668.00	\$146,528,068.69
Televisions	\$61,005,761.00	\$77,493,679.36	\$545,348.00	\$887,453.45
Video Production	\$5,330,250.00	\$7,363,828.80	\$34,775,407.00	\$50,689,447.82

Note: The default stylesheet is used to format the report. You can create your own stylesheet or choose from other stylesheets that are available in the product.

Procedure: How to Create a Tabular Report Using the Report Canvas

1. On the Home tab, in the Content group, click *Report* or in the Environments Tree panel, right-click the desired folder, point to *New*, and click *Report*.

The Report Wizard opens.

2. Click *Create Report*.
3. Navigate to where you want to create the new procedure and select a data source. For this example, click *wf_retail.mas*.

The Report canvas opens.

4. Add the following fields to your report in the following order. You can double-click the fields in the Object Inspector, or drag them to the Report canvas.
 - ❑ PRODUCT_CATEGORY
 - ❑ BRANDTYPE
 - ❑ COGS_US
 - ❑ REVENUE_US
5. Select the *BRANDTYPE* field and from the Column Type group, select *Sort Across* to sort the report across brand type values.
6. To add a heading to the report, on the Report tab, click *Header & Footer* and select *Report Header*.
7. Type *Cost and Revenue* in the Heading text box.
8. In the Procedure View panel, right-click the *Comment* component, point to *New*, and click *Set*.

The Set canvas opens.
9. In the Available Settings area, use the scrollbar to locate the *NODATA* setting.
10. Double-click *NODATA* or select *NODATA* and click *Add*.

The *NODATA* setting now appears in the Used Settings area.
11. Type *N/A* in the Current Value area to change the default missing data character from a period (.) to *N/A* to indicate the missing data in the report.
12. Run the report.

Procedure: How to Create a Tabular Report Using WebFOCUS Syntax

You can create the tabular report using the following WebFOCUS syntax, which you can type into a procedure using the Text Editor.

```
TABLE FILE WF_RETAIL
HEADING
"Cost and Revenue"
SUM COGS_US REVENUE_US
BY PRODUCT_CATEGORY
ACROSS BRANDTYPE
ON TABLE SET NODATA N/A
END
```


Creating an Active Report

The following image shows an active report designed for offline analysis. The request uses the ON TABLE PCHOLD FORMAT AHTML command to create the active report. Analysis options include filtering, sorting, charting, and much more. You click an arrow next to a column heading to gain access to the analytic options. For more information on active reports, see the *Active Technologies User's Guide*.

7 of 7 records, Page 1 of 1

Cost and Revenue					
Brand Type					
Major Brand			Specialty Brand		
Product Category	Cost of Goods	Revenue	Cost of Goods	Revenue	
Accessories	\$10,180,257.00	\$20,077,815.96	\$79,573,641.00	\$109,530,522.5	
Camcorder	\$104,866,857.00	\$154,465,702.24	N/A	N/A	
Computers	\$69,807,664.00	\$103,316,482.12	N/A	N/A	
Media Player	\$184,945,460.00	\$238,633,342.22	\$5,295,021.00	\$7,439,717.1	
Stereo Systems	\$96,501,195.00	\$144,766,864.83	\$108,612,668.00	\$146,528,068.0	
Televisions	\$61,005,761.00	\$77,493,679.36	\$545,348.00	\$887,453.4	
Video Production	\$5,330,250.00	\$7,363,828.80	\$34,775,407.00	\$50,689,447.8	

Sort Ascending

Sort Descending

Filter

Calculate

Chart

Rollup

Pivot (Cross Tab)

Visualize

Hide Column

Grid Tool

Chart/Rollup Tool

Procedure: How to Create an Active Report Using the Report Canvas

- 1. Create the tabular report outlined in [How to Create a Tabular Report Using the Report Canvas](#) on page 251.
- 2. On the Format tab, click *active report*.
- 3. Run the report.

Procedure: How to Create an Active Report Using WebFOCUS Syntax

You can create the active report using the following WebFOCUS syntax, which you can type into a procedure using the Text Editor.

```
TABLE FILE WF_RETAIL
HEADING CENTER
"Cost and Revenue"
SUM COGS_US REVENUE_US
BY PRODUCT_CATEGORY
ACROSS BRANDTYPE
ON TABLE PCHOLD FORMAT AHTML
ON TABLE SET NODATA N/A
END
```

Creating an Excel FORMULA Table of Contents Report

The following image shows an Excel Workbook with multiple worksheets (tabs) for each value of the major sort field (BY) and with formulas for the column totals. The request uses the ON TABLE PCHOLD FORMAT XLSX FORMULA BYTOC command to create the multiple worksheets.

D11				=SUM(D4:D10)
	A	B	C	D
1	Cost and Revenue			
2				
3	Brand Type	Product Category	Cost of Goods	Revenue
4	Major Brand	Accessories	\$10,180,257.00	\$20,077,815.96
5		Camcorder	\$104,866,857.00	\$154,465,702.24
6		Computers	\$69,807,664.00	\$103,316,482.12
7		Media Player	\$184,945,460.00	\$238,633,342.22
8		Stereo Systems	\$96,501,195.00	\$144,766,864.83
9		Televisions	\$61,005,761.00	\$77,493,679.36
10		Video Production	\$5,330,250.00	\$7,363,828.80
11	*TOTAL Major Brand		\$532,637,444.00	\$746,117,715.53
12				
13				
14				
15				

Procedure: How to Create an Excel Formula Table of Contents Report Using the Report Canvas

1. Create the tabular report outlined in [How to Create a Tabular Report Using the Report Canvas](#) on page 251.

2. Select the *Brand Type* field and from the Column Type group, select *Sort Down* to change the field from an Across field to a By field.
3. Drag the Brand Type field before the Product Category field so that Brand Type is the first By sort field.
4. From the Report group, click *Column Total* and select *Column Totals* to create totals for each of the numeric columns (Cost of Goods, Revenue) and to show the formula capability.
5. On the Format tab, in the Output Types group, click *Excel* and select *Excel XLSX Formula*.
The Output Format Options dialog box opens.
6. Select *On* for the Create separate worksheets for each primary sort value option.
7. Run the report.

Procedure: How to Create an Excel Formula Table of Contents Report Using WebFOCUS Syntax

You can create the Excel Formula Table of Contents report using the following WebFOCUS syntax, which you can type into a procedure using the Text Editor.

```
TABLE FILE WF_RETAIL
HEADING
"Cost and Revenue"
SUM COGS_US REVENUE_US
BY BRANDTYPE
BY PRODUCT_CATEGORY
ON TABLE SUBTOTAL
ON TABLE PCHOLD FORMAT XLSX FORMULA BYTOC
END
```

Creating a Financial Report

In a financial report, specific rows can be placed anywhere in the report.

- ☐ Rows can be displayed for selected values in the data source (TAG rows).
- ☐ Rows can be displayed for values calculated from that data (RECAP).
- ☐ Values can be inserted directly or picked up from another file (POST and PICKUP).
- ☐ Text rows, blank rows, and rows of bars (BAR) can be inserted at any point in the report for clarity.
- ☐ Inter-row and inter-column calculations can be performed at any point in the report.

The following image shows a financial report with cost and revenue for specific products.

Cost and Revenue		
	<u>Cost of Goods</u>	<u>Revenue</u>
---Entertainment---		
Stereo Systems	\$205,113,863.00	\$291,294,933.52
Televisions	\$59,077,345.00	\$74,962,843.71
Total Entertainment	\$264,191,208.00	\$366,257,777.23
---Accessories---		
Headphones	\$44,281,114.00	\$65,769,422.39
Remote Controls	\$17,801,299.00	\$23,720,981.20
Total Accessories	\$62,082,413.00	\$89,490,403.59
Total	\$326,273,621.00	\$455,748,180.82

Procedure: How to Create a Financial Report Using the Report Canvas and Matrix Tab

1. On the Home tab, in the Content group, click *Report* or in the Environments Tree panel, right-click the desired folder, point to *New*, and click *Report*.

The Report Wizard opens.

2. Click *Create Report*.
3. Navigate to where you want to create the new procedure and select a data source. For this example, click *wf_retail.mas*.

The Report canvas opens.

4. Add the following fields to your report in the following order. You can double-click the fields in the Object Inspector, or drag them to the Report canvas.

☐ ID_PRODUCT

☐ COGS_US

☐ REVENUE_US

5. To add a heading to the report, on the Report tab, click *Header & Footer* and select *Report Header*.
6. Type *Cost and Revenue* in the Heading text box.
7. Select the ID_PRODUCT field, and from the Column Type group, select *For Row*.

8. Click the *Matrix* tab, to open the Matrix canvas.
9. Create a text row to introduce the Entertainment group:
 - a. Click *Text* from the Insert group to make the row a text row, or right-click row R1 (except on the label) and select *Change Type to*, and then select *Text*.
The TEXT dialog box opens.
 - b. Type the following in the text box:
`Entertainment:`
 - c. Click *OK*.
Entertainment appears in the Title column on the matrix.
10. Create a row for the Stereo Systems product codes:
 - a. In the For field values panel, multi-select 2001 to 2167 and drag the values to row R2 in the ID_PRODUCT column.
Notice that the TAG row type is entered in the Row Type column. You can also select *Tag* from the Insert group and type the tag values into the dialog box.
By default, for a tag row, the tag values will display in the left on the report. However, you can change the row title on the report. In addition, if you want to use this row in calculations in the report, you can assign it a label to use as a name in the calculations.
 - b. Right-click 2001 TO 2167 in the ID_PRODUCT column and select *Row Properties*.
The TAG dialog box opens.
 - c. On the General tab, type an optional label and title for the 2001 TO 2167 ID_PRODUCT values, for example SS and Stereo Systems, respectively.
 - d. Click *OK* to return to the matrix.
11. Create a row for the Televisions product codes:
 - a. In the For field values panel, multi-select 4012 to 4018 and drag the values to row R3 in the ID_PRODUCT column.
Notice that the TAG row type is entered in the Row Type column. You can also select *Tag* from the Insert group and type the tag values into the dialog box.
 - b. Right-click 4012 TO 4018 and select *Row Properties*.
The TAG dialog box opens.

- c.** On the General tab, type an optional label and title for the 4012 TO 4018 ID_PRODUCT values, for example *TV* and *Televisions*, respectively.
 - d.** Click *OK* to return to the matrix.
- 12. Place an underscore under the Entertainment rows:
 - a.** Click *Bar* from the Insert group to make the row a bar row, or right-click row R4 (except on the label) and select *Change row type to*, and then select *Bar*.

The BAR dialog box opens.
 - b.** Click *OK* to accept the default underline character.
- 13. Add a row that totals the Entertainment products:
 - a.** Click *Recap* from the Insert group to make the row a recap row, or right-click row R5 (except on the label) and select *Change Type to*, and then select *Recap*.

The RECAP dialog box opens at the Options tab.
 - b.** Type *SS + TV* in the Recap box.
 - c.** Click the *General* tab and type the label and title for the Recap calculation, for example, *ENTERTAIN* and *Total Entertainment*, respectively.
- 14. Create a text row to introduce the Accessories group:
 - a.** Click *Text* from the Insert group to make the row a text row, or right-click row R6 (except on the label) and select *Change Row Type to*, and then select *Text*.

The TEXT dialog box opens.
 - b.** Type the following in the text box:

Accessories:
 - c.** Click *OK*.

Accessories: appears in the Title column on the matrix.
- 15. Create a row for the Headphones product codes:
 - a.** In the For field values panel, multi-select *5001* to *5007* and drag the values to row R7 in the ID_PRODUCT column.

Notice that the TAG row type is entered in the Row Type column. You can also select *Tag* from the Insert group and type the tag values into the dialog box.
 - b.** Right-click *5001 TO 5007* and select *Row Properties*.

The TAG dialog box opens.

- c.** On the General tab, type an optional label and title for the 5001 TO 5007 ID_PRODUCT values, for example *HP* and *Headphones*, respectively.
- d.** Click *OK* to return to the matrix.

16. Create a row for the Remote Controls product codes:

- a.** In the For field values panel, multi-select 5008 to 5009 and drag the values to row R8 in the ID_PRODUCT column.

Notice that the TAG row type is entered in the Row Type column. You can also select *Tag* from the Insert group and type the tag values into the dialog box.

- b.** Right-click *5008 TO 5009* and select *Row Properties*.

The TAG dialog box opens.

- c.** On the General tab, type an optional label and title for the 5008 TO 5009 ID_PRODUCT values, for example *RC* and *Remote Controls*, respectively.
- d.** Click *OK* to return to the matrix.

17. Place an underscore under the Accessories rows:

- a.** Click *Bar* from the Insert group to make the row a bar row, or right-click row R9 (except on the label) and select *Change Type to*, and then select *Bar*.

The BAR dialog box opens.

- b.** Click *OK* to accept the default underline character.

18. Add a row that totals the Accessories products:

- a.** Click *Recap* from the Insert group to make the row a recap row, or right-click row R10 (except on the label) and select *Change Type to*, and then select *Recap*.

The RECAP dialog box opens at the Options tab.

- b.** Type *HP + RC* in the Recap box.
- c.** Click the *General* tab and type the label and title for the Recap calculation, for example, *TOTACC* and *Total Accessories*, respectively.

19. Place an underscore under the Total Accessories row:

- a.** Click *Bar* from the Insert group to make the row a bar row, or right-click row R11 (except on the label) and select *Change row type to*, and then select *Bar*.

The BAR dialog box opens.

- b. Click *OK* to accept the default underline character.
20. Add a row that totals both the Entertainment and Accessories products:
 - a. Click *Recap* from the Insert group to make the row a recap row, or right-click row R12 (except on the label) and select *Change Type to*, and then select *Recap*.
The RECAP dialog box opens at the Options tab.
 - b. Type *ENTERTAIN + TOTACC* in the Recap box.
 - c. Click the *General* tab and type the label and title for the Recap calculation, for example, *TOTAL* and *Total*.
21. Run the report.

Procedure: How to Create a Financial Report Using the WebFOCUS Syntax

You can create the financial report using the following WebFOCUS syntax that defines the report output on a row-by-row basis.

```
TABLE FILE WF_RETAIL_SALES
HEADING CENTER
"Cost and Revenue"
" "
SUM COGS_US REVENUE_US
FOR ID_PRODUCT
"---Entertainment---" OVER
'2001' TO '2167' AS 'Stereo Systems' LABEL SS OVER
'4012' TO '4018' AS 'Televisions' LABEL TV OVER
BAR OVER
RECAP ENTERTAIN=SS + TV; AS 'Total Entertainment' OVER
"---Accessories---" OVER
'5001' TO '5007' AS 'Headphones' LABEL HP OVER
'5008' TO '5009' AS 'Remote Controls' LABEL RC OVER
BAR OVER
RECAP TOTACC=HP+RC; AS 'Total Accessories' OVER
BAR OVER
RECAP TOTAL=ENTERTAIN+TOTACC; AS 'Total'
ON TABLE NOTOTAL
ON TABLE SET STYLE *
TYPE=REPORT, GRID=OFF , $
ENDSTYLE
END
```


Creating a Precision Report

The precision report is a report type that gives you an additional set of tools that make it easy to control the precise placement of objects and data in the report output. For example, with a precision report, you can quickly create a layout that is perfectly aligned for a preprinted form (like a Bill of Sale or a tax form) and that automatically breaks out one record per report page. Other benefits of precision reports include:

- ❑ Select multiple objects to size identically, or space evenly.
- ❑ Enhance headers and footers by including fields as display variables.
- ❑ Create Composition Templates to run the same precision report with different attribute values.

You can convert an existing report into a precision report or you can create a new precision report.

The following image shows an example of a precision report. Precision reports are built in the Precision Report canvas. You can output them in PDF, DHTML, and PostScript formats.

Revenue by *EMEA*

Customer Business Region	Product Category	Revenue
EMEA	Accessories	\$211,477.99
	Camcorder	\$280,235.28
	Computers	\$78,240.81
	Media Player	\$424,907.47
	Stereo Systems	\$514,689.93
	Televisions	\$123,921.37
	Video Production	\$112,141.72
North America	Accessories	\$249,935.10
	Camcorder	\$349,755.15
	Computers	\$87,843.34

For more information on creating a precision report using the Precision Report canvas, see [Accessing the Precision Reports Canvas](#) on page 269.

Procedure: How to Create a Precision Report Using the Precision Report Canvas

The following example shows how to create a precision report showing Revenue by Vendor and Product Category.

1. On the Home tab, in the Content group, click *Report* or in the Environments Tree panel, right-click the desired folder, point to *New*, and click *Report*.

The Report Wizard opens.

2. Click *Create Report*.
3. Navigate to where you want to create the new procedure and select a data source. For this example, click *wf_retail.mas*.

The Report canvas opens.

4. On the Report tab, in the Report group, click *Precision Report*.

A styling warning message appears indicating that the report will be converted to a precision report. Click *Yes* to close the message and open the Precision Report canvas.


5. Create a report in the Data Matrix layer:
 - a. In the Layers tab, under the Data Matrix layer, click *REGION*. The region object is displayed as a highlighted square in the Precision Reports canvas.
 - b. Click the *Fields* tab. In the Dimensions folder, expand the Product cube. Expand the Product hierarchy and click *Product,Category*. Drag it into the region object.
 - c. In the Dimensions folder, Product cube, expand the Vendor hierarchy and click *Vendor,Business,Region*. Drag it into the region object.
 - d. In the Measures folder, expand the Sales hierarchy and click *Revenue*. Drag it into the region object.
 - e. Drag the region placeholder to resize the region.
6. Add a Where clause filter in the report to show only non-zero revenue amounts:
 - a. On the Report tab, in the Filter group, click *Filter*. The Filter drop-down menu opens.
 - b. From the drop-down menu, click *Where*. The Expression Builder opens.
 - c. In the Measures folder, expand the Sales hierarchy and double-click *Revenue*. It now displays in the *Column to filter* field.
 - d. In the Logical Relation drop-down list, click *is greater than*.
 - e. In the Compare Type drop-down list, click *Value*.

- f.** In the Compare Value field, type 0. The filter criteria appears as follows.


Column to filter	Logical Relation	Compare Type	Compare Value
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US	is greater than	Value	0

- g.** Click *OK* to save the filter and close the Expression Builder. The report will now suppress all rows with zero revenue.

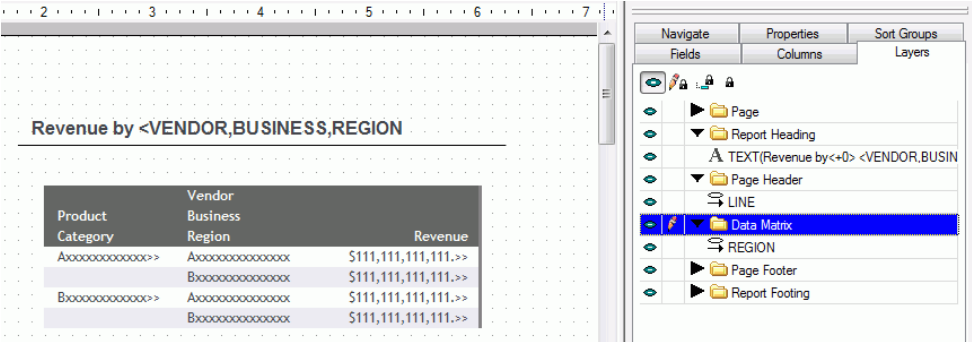
7. Add a Report Heading layer to the report with text and an embedded field:

- a.** Select the *Report Heading* layer from the Layers tab.
- b.** On the *Tools* tab, in the *Objects* group, click *Add Text*. The pointer becomes an arrow over a letter T .
- c.** Click the canvas to add a text box. You can also drag the pointer on the canvas to create a text box in the size that you want.

Note: Use the options in the Default Style group of the Tools tab to select the desired font, size, and style of the text.

- d.** Type *Revenue by* and place the pointer after *by*.
 - e.** In the Fields tab, in the Dimensions folder, Product cube, expand the Vendor hierarchy and double-click *Vendor,Business,Region*. The field is added to the text object as *<Vendor,Business,Region*.
8. Add a Page Header layer to the report:
- a.** Click the *Page Header* layer from the Layers tab.
 - b.** On the *Tools* tab, in the *Objects* group, click *Add Line*. The pointer changes to an arrow over a line segment .
 - c.** Drag the pointer on the canvas to create a line below the text added in step 7.
9. Click *Save*.

The Precision Report canvas will appear similar to the following image.



Procedure: How to Create a Precision Report Using the WebFOCUS Language

You can create the precision report using the following WebFOCUS syntax, which you can type into a procedure using the Text Editor.

```
TABLE FILE WF_RETAIL
SUM REVENUE_US
BY BUSINESS_REGION
BY PRODUCT_CATEGORY
WHERE REVENUE_US GT 0;
ON TABLE SUBHEAD
"Revenue by <12 <BUSINESS_REGION "
ON TABLE SET NEWLAYOUT ON
ON TABLE PCHOLD FORMAT PDF
ON TABLE SET STYLE *
    INCLUDE = endeflt,
$
TYPE=TABHEADING,
    LINE=1,
    POSITION=(1.1 1),
    WRAP=ON,
    DIMENSION=(6 1),
    NAME=TEXT, FONT='ARIAL', COLOR='RED',
$
TYPE=TABHEADING, OBJECT=TEXT, SIZE=15, STYLE=NORMAL , $
TYPE=TABHEADING, OBJECT=FIELD, SIZE=15, STYLE=ITALIC , $
$
TYPE=HEADING,
    OBJECT=Line,
    POSITION=(1.055556 1.402778),
    ENDPOINT=(4.3 1.4),
    NAME=LINE,
    BORDER-TOP=1.00,
$
TYPE=DATAMATRIX,
    NAME=Data Matrix,
    POSITION=(1.1 1.5),
    DIMENSION=(5 3), $
ENDSTYLE
END
```

Creating a Tabular Report Using an SQL Request

You can retrieve information using the SQL reporting language, and can directly incorporate WebFOCUS formatting commands into the procedure. The following request uses the SQL SELECT statement to create a simple tabular report.

SQL

```
SELECT BRANDTYPE, PRODUCT_CATEGORY, SUM(COGS_US), SUM(REVENUE_US)
FROM WF_RETAIL
GROUP BY BRANDTYPE, PRODUCT_CATEGORY;
END
```

The output is:

PAGE 1			
BRANDTYPE	PRODUCT_CATEGORY	SUM Cost of Goods	SUM Revenue
Major Brand	Accessories	\$10,180,257.00	\$20,077,815.96
Major Brand	Camcorder	\$104,866,857.00	\$154,465,702.24
Major Brand	Computers	\$69,807,664.00	\$103,316,482.12
Major Brand	Media Player	\$184,945,460.00	\$238,633,342.22
Major Brand	Stereo Systems	\$96,501,195.00	\$144,766,864.83
Major Brand	Televisions	\$61,005,761.00	\$77,493,679.36
Major Brand	Video Production	\$5,330,250.00	\$7,363,828.80
Specialty Brand	Accessories	\$79,573,641.00	\$109,530,522.57
Specialty Brand	Media Player	\$5,295,021.00	\$7,439,717.14
Specialty Brand	Stereo Systems	\$108,612,668.00	\$146,528,068.69
Specialty Brand	Televisions	\$545,348.00	\$887,453.45
Specialty Brand	Video Production	\$34,775,407.00	\$50,689,447.82

Generating an SQL Script as a Subquery to Another Request

The following request uses the ON TABLE HOLD FORMAT SQL_SCRIPT command to automatically generate a file containing an SQL SELECT statement that can be used as a subquery in another request. The request includes a WHERE phrase to exclude the Accessories product category.

```
TABLE FILE WF_RETAIL
SUM MSRP_US
BY PRODUCT_CATEGORY
WHERE PRODUCT_CATEGORY NE 'Accessories'
ON TABLE HOLD AS appl/sql1 FORMAT SQL_SCRIPT
END
```

The following is the Master File that is generated by the ON TABLE HOLD FORMAT SQL_SCRIPT command:

```
FILENAME=SQL1, SUFFIX=SQLMSS , $
SEGMENT=SQL1, SEGTYPE=S0, $
  FIELDNAME=PRODUCT_CATEGORY, ALIAS=E01, USAGE=A40V, ACTUAL=A40V,
  MISSING=ON,
  TITLE='Product,Category', $
  FIELDNAME=MSRP_US, ALIAS=E02, USAGE=D20.2, ACTUAL=D8,
  MISSING=ON,
  TITLE='MSRP', $
```

The following is the Access File that is generated by the ON TABLE HOLD FORMAT SQL_SCRIPT command:

```
SEGNAME=SQL1,
  CONNECTION=wfretail,
  DATASET=APP1/SQL1.SQL,
  KEY=PRODUCT_CATEGORY,
  SUBQUERY=Y, $
```

The following is the SQL SELECT statement that is generated by the ON TABLE HOLD FORMAT SQL_SCRIPT command and that you can use as a subquery:

```
SELECT T18."PRODUCT_CATEGORY" AS "E01", SUM(T1."REVENUE_US") AS "E02",
SUM(T1."COGS_US") AS "E03 FROM (wrд_wf_retail_sales T1 LEFT OUTER JOIN
  wrд_wf_retail_product T18 ON T18."ID_PRODUCT" = T1."ID_PRODUCT")
GROUP BY T18."PRODUCT_CATEGORY"
```

The following is a TABLE request that uses the sql1 file:

```
TABLE FILE wf_retail
SUM REVENUE_US
BY PRODUCT_CATEGORY WHERE DB_INFILE(sql1, PRODUCT_CATEGORY,
PRODUCT_CATEGORY)
END
```

The following is the generated SQL request in which the sql1 file is used as a subquery:

```
SELECT
  T18."PRODUCT_CATEGORY",
  SUM(T1."REVENUE_US")
  FROM
  wrd_wf_retail_sales T1,
  wrd_wf_retail_product T18
  WHERE
  (T18."ID_PRODUCT" = T1."ID_PRODUCT") AND
  (T18."PRODUCT_CATEGORY" IN (SELECT "E01"
  FROM
  (SELECT T18."PRODUCT_CATEGORY" AS "E01",
  SUM(T1."MSRP_US") AS "E02"
  FROM
  wrd_wf_retail_sales T1,
  wrd_wf_retail_product T18
  WHERE
  (T18."ID_PRODUCT" = T1."ID_PRODUCT") AND
  (T18."PRODUCT_CATEGORY" <> 'Accessories')
  GROUP BY
  T18."PRODUCT_CATEGORY") S1))
  GROUP BY
  T18."PRODUCT_CATEGORY"
  ORDER BY
  T18."PRODUCT_CATEGORY";
```

The output is shown in the following image. Note that the Accessories product category is omitted from the report because of the subquery.

PAGE 1	
Product Category	Revenue
Camcorder	\$667,254.48
Computers	\$179,761.46
Media Player	\$1,009,790.56
Stereo Systems	\$1,216,393.89
Televisions	\$286,160.68
Video Production	\$259,179.84

Accessing the Precision Reports Canvas

You can access the Precision Report canvas by converting an existing report or by creating a new precision report.

Note: All of the tabs and panels that you use to develop regular reports are also used in precision reports. The additional tools found in the Precision Report canvas are available only for precision reports.

Procedure: How to Access the Precision Report Canvas By Converting an Existing Report

1. Open the procedure (.fex file) for a selected report. To do this, you may use one of the following methods:
 - ❑ On the Home tab, in the Content group, click *Report*. The Report Wizard opens.
 - ❑ In the Environments Tree panel, navigate to the desired folder and double-click the report.
2. If the selected procedure was created with the Report canvas, it will automatically open in the Report canvas.

If the selected procedure was not created with the Report canvas, it will automatically open in the Procedure Viewer. In this case, double-click a report component to open it in the Report canvas.

3. On the Report tab, in the Report group, click *Precision Report*.

A style warning message appears, indicating that the report will be converted to a precision report.

4. Click Yes to convert the report and open it in the Precision Report canvas. The next time the report is opened, the Precision Report canvas will automatically be active.

Similar to the Object Inspector in the Report canvas, the Precision Report canvas includes a window containing tabs used for creating and building Precision Reports. This window has the Fields, Sort Groups, Properties, and Columns tabs found in the Object Inspector, but also includes the Layers tab and Navigate tab, which are unique to the Precision Report canvas.

By default, the report output is PDF. To change the output format, on the Format tab, in the Output Types group, click *Output Format*. In the drop-down menu that appears, point to *Styled report formats*, and click the desired output.

You may edit the report by changing the alignment and position of the objects in the report.

Reference: Usage Notes for Converting Existing Reports to Precision Reports

The following conditions apply when converting existing reports to precision reports:

- ❑ If you are converting a report component that was created using the Document canvas and the output format is not supported by the precision reports feature, the following message displays:

Your report is using a locked format that is not supported by Precision Reports.

In this case, you may want to create a new precision report to replicate the original, using a supported output format.
- ❑ The existing report heading and report footing will not convert to the precision report. You can create them in the Precision Report canvas.
- ❑ The subheading and subfooting will convert to the precision report, including the alignment grid options set in the Report canvas. You can edit them in the Data Matrix layer of the Precision Report canvas.
- ❑ Reports with images, parameters, and drill downs will convert to the precision report, but you cannot edit them in the Precision Report canvas.

Procedure: How to Access the Precision Report Canvas for a New Report

1. To access the Precision Report canvas for a new report, do one of the following:

- ❑ On the Home tab, in the Content group, click *Report*.
- ❑ In the Environments Tree panel, right-click the desired folder, point to *New*, and click *Report*.

The Report Wizard opens.

2. Navigate to the desired folder, choose a data source, and click *Finish*. For more information on the Report Wizard, see [How to Create a Report Using the Report Wizard](#) on page 244.

The Report canvas opens.

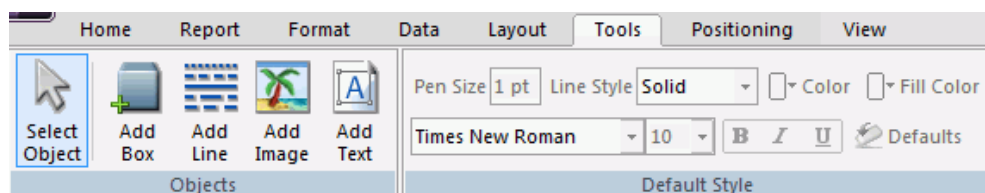
3. On the Report tab, in the Report group, click *Precision Report*.

A style warning message appears, indicating that the report will be converted to a precision report. Click Yes to close the message and open the Precision Report canvas.

Accessing Precision Report Components With the Precision Report Canvas Tools Tab

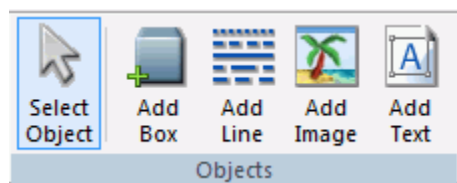
The Precision Report canvas Tools tab contains commands that provide quick access to commonly performed functions. This tab is only available when creating Precision Reports. The availability of the commands is context-sensitive to the object that is highlighted in the canvas.

The Tools tab contains the Objects and Default Style groups, as shown in the following image.



Selecting and Adding Objects in a Precision Report Using the Objects Group

The Objects group contains commands to select and add objects to precision reports, as shown in the following image.




The commands are:

Select Object

Allows you to select (single-click) or edit (double-click) an object.


Tip: Click *Select Object* after inserting a box, line, image, or text to return to select mode.

Add Box

Allows you to add a box to the Precision Report canvas. When this command is active, the pointer becomes an arrow with a box . Click the canvas to add a box. You can also drag the pointer on the canvas to create a box in the size that you want.

When you add a box, the Default Style group on the Tools tab becomes active with options to set the pen size, line style, fill color, and line color.

Add Line

Allows you to add a line to the Precision Report canvas. When this command is active, the pointer becomes an arrow over a line segment . Drag the pointer on the canvas to create a line and adjust it to the size that you want.


When you add a line, the Default Style group on the Tools tab becomes active with options to set the pen size, line style, fill color, and line color.

Add Image

Allows you to add an image to the Precision Report canvas. When this command is active, the pointer becomes an arrow over a flower . Click the canvas or drag the pointer on the canvas to create a box in the size that you want.

The Open File dialog box opens. Select the desired image and click OK.

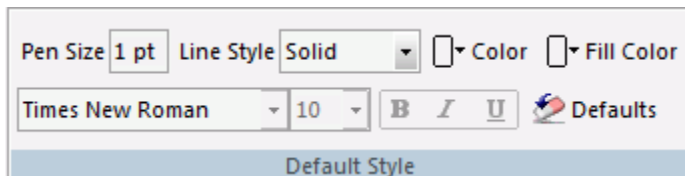
Add Text

Allows you to add text to the Precision Report canvas. When this command is active, the pointer becomes an arrow over a letter T . Click the canvas to add a text box. You can also drag the pointer on the canvas to create a text box in the size that you want.

When you add text, the Default Style group on the Tools tab becomes active with options to set the font, size, color, and formatting.

Customizing Objects in a Precision Report Using the Default Style Group

The Default Style group contains commands and options to customize the box, line, and text objects added to a precision report. The Default Style group is shown in the following image.



Pen Size

Sets the default pen size for box and line objects.

Line Style

Sets the default line style for box and line objects. The options are Solid, Dotted, and Dashed.

Color

Sets the default color for box, line, and text box objects.

Fill Color

Sets the default fill color for box and text box objects.

Font Name

Sets the default font type for text boxes. This option is only available for a text box.

Font Size

Sets the default font size for text boxes. This option is only available for a text box.

Bold

Sets bold font formatting as the default for text boxes. This option is only available for a text box.

Italic

Sets italic font formatting as the default for text boxes. This option is only available for a text box.

Underline

Sets underline font formatting as the default for text boxes. This option is only available for a text box.

Defaults

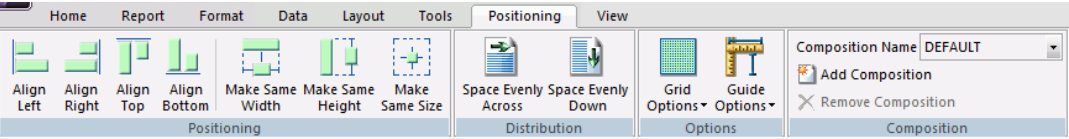
Resets the style settings of the selected object to the default, original style.

Positioning Objects in a Precision Report With the Precision Report Canvas Positioning Tab

The alignment commands on the Positioning tab enable you to select multiple objects in the same layer and easily position them relative to one another.

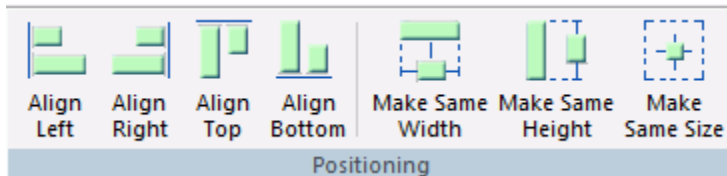
The availability of the commands is context-sensitive to the objects that are selected in the canvas. You cannot select multiple objects in different layers.

The Positioning tab contains the Positioning, Distribution, Options and Composition groups, as shown in the following image.



Aligning Objects in a Precision Report Using the Positioning Group

The Positioning group contains commands to align the objects on the Precision Report canvas, as shown in the following image.



Align Left

Aligns the selected object to the left of the last object selected.

Align Right

Aligns the selected object to the right of the last object selected.

Align Top

Aligns the selected object to the top edge of the last object selected.

Align Bottom

Aligns the selected object to the bottom edge of the last object selected.

Make Same Width

Makes two or more objects the same width.

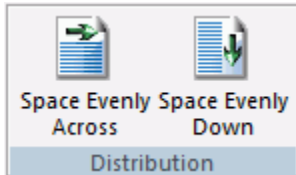
Make Same Height

Makes two or more objects the same height.

Make Same Size

Makes two or more objects the same size.

Controlling Spacing Between Objects in a Precision Report Using the Distribution Group



Space Evenly Across

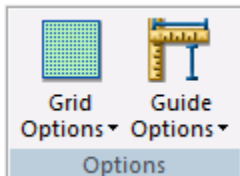
Sets the horizontal spacing between three or more selected objects to be the same.

Tip: To select multiple objects, use the Shift key.

Space Evenly Down

Sets the vertical spacing between three or more selected objects to be the same.

Setting Grid and Ruler Options for a Precision Report Using the Options Group



Grid Options

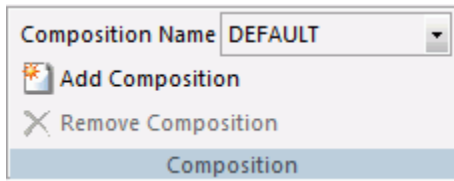
Sets grid visibility and snap option.

Guide Options

Sets guide visibility and snap option.

Note: These options are applicable when the page ruler is on.

Adding or Removing Compositions in a Precision Report Using the Composition Group



Composition Name

Displays a drop-down list of available compositions. You can rename composition names.

Add Composition

Adds a composition. The name of the composition is derived by the system (COMP00).

Remove Composition

Deletes a composition.

Working With Precision Report Tabs

The Precision Report canvas is characterized by a window containing multiple tabs. Each tab contains tools that enable you to design and create positioned elements for your precision report. The default tabs are:

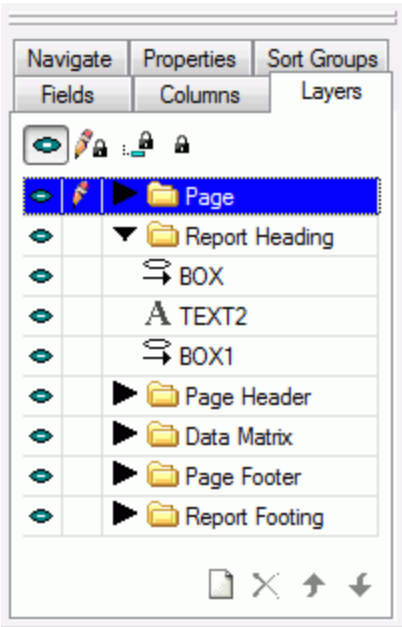
- ☐ Layers
- ☐ Sort Groups
- ☐ Columns
- ☐ Fields
- ☐ Properties
- ☐ Navigate

These tabs are detailed in the following sections.






Reference: Precision Report Canvas Layers Tab



By default, the Layers tab consists of the Page, Report Heading, Page Header, Data Matrix, Page Footer, and Report Footing layers, as shown in the following image. You can add additional layers as needed.

The Data Matrix layer inserts a placeholder for the reporting data. You can snap objects (boxes, lines, images, text) to the layout.



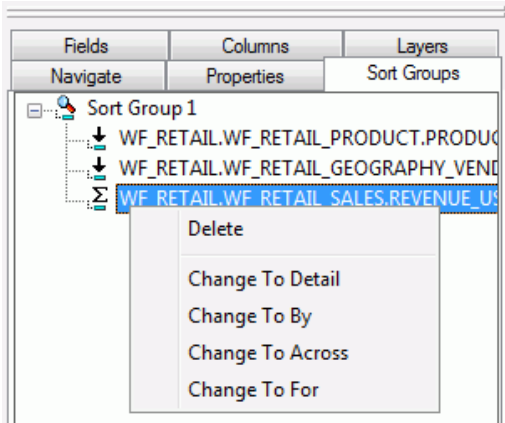
The following commands are available on the Layers tab:

Command	Definition
	Shows or hides the selected layer in the Precision Report canvas.
	Enables or disables styling changes.
	Enables or disables data changes.
	Enables or disables all changes.
	Creates a new layer for the precision report.

Command	Definition
	Deletes the selected object or layer. If a layer is deleted, all objects within it are deleted as well.
	Moves the selected object up or down in the selected layer.

Reference: Precision Report Canvas Sort Groups Tab

You can view and modify the sorting properties of fields in the Data Matrix from the Sort Groups tab in the Precision Report canvas, as shown in the following image.








The Sort Groups tab displays the sorting method being applied to each column in the Data Matrix layer. You can change the sorting method (for example, from *By* to *Across* or from *Detail* to *Sum*) by using the right-click context tab. The changes are reflected in the Columns and Sort Groups tabs and in the Data Matrix layer.

You can also use the Sort Groups tab to create multi-verb requests.

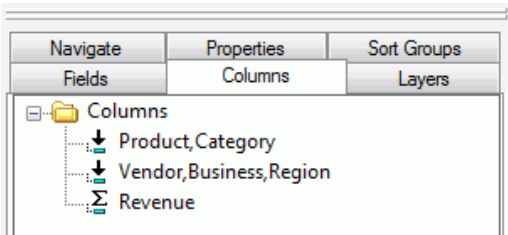
Reference: Sort Type Icons

The icons in the first column to the left of the field name display the type of sort field. The icons and their meanings are defined in the following table:

Icon	Definition
	Across field.
	By field.
	Sum field.
	Detail field.
	For field.

Reference: Precision Report Canvas Columns Tab

You can view and modify the columns in the Data Matrix layer from the Columns tab in the Precision Report canvas, as shown in the following image.



Right-click a column and select *Options* from the context tab to open the Field Properties dialog box, where you can format and style the column, as well as apply drill down capabilities. Any changes made to the column properties are reflected in the Data Matrix layer.

Reference: Precision Report Canvas Fields Tab

You can view the fields used in the Data Matrix layer as a:

- ❑ Tree separated by segments (the Field Tree).
- ❑ List of fields (the Field List).
- ❑ Tree separated by Dimensions (the Dimension Tree).

To change the view, right-click in the Fields tab and choose the view from the shortcut menu.

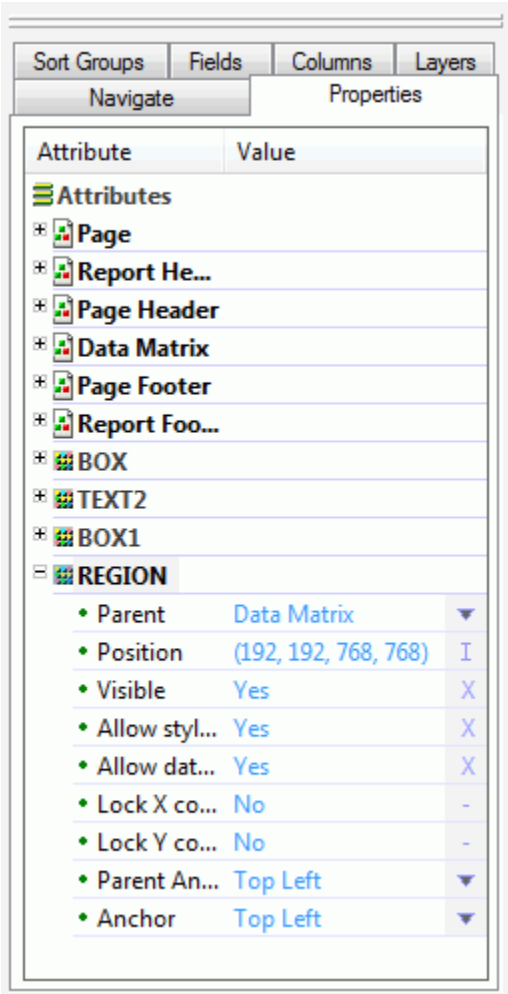
You can double-click or drag segments or fields from this tab to the Precision Report canvas, where they become report columns.

You can customize how you view the fields list and save your settings. Right-click in the Fields tab and select one of the *Save Settings* options from the shortcut menu.

You can also search for fields in the fields list. Right-click in the fields tab and select *Find Item* from the shortcut menu.

Reference: Precision Report Canvas Properties Tab

The Properties tab displays attributes and their editable values, grouped by category, as shown in the following image.

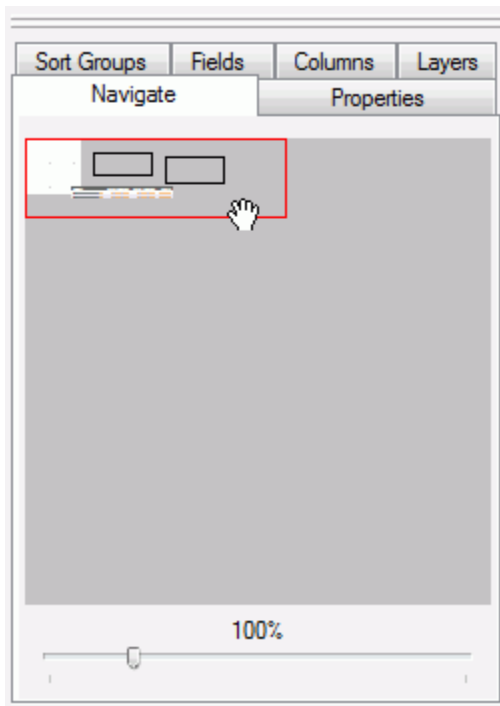


Reference: Precision Report Canvas Navigate Tab

You may view the entire layout of the precision report in the Navigate tab.

- ❑ The slider bar enables you to increase or decrease the zoom percentage of the layout.

- ❑ Drag the red box in the Navigate tab to view different elements of the precision report in the layout, as shown in the following image.



Creating Precision Reports Using the Data Matrix Layer

Precision reports are created in the Precision Report canvas by using the Data Matrix layer as the reporting object, and by inserting objects in the other layers as fields.

Procedure: How to Build a Report in the Data Matrix Layer

1. To access the Precision Report canvas for a new report, do one of the following:
 - ❑ On the Home tab, in the Content group, click *Report*.
 - ❑ In the Environments Tree panel, right-click the desired folder, point to *New*, and click *Report*.

The Report Wizard opens.

2. Navigate to the desired folder, choose a data source, and click *Finish*. For more information on the Report Wizard, see [How to Create a Report Using the Report Wizard](#) on page 244.

The Report canvas opens.

3. On the Report tab, in the Report group, click *Precision Report*.

A style warning message appears, indicating that the report will be converted to a precision report. Click Yes to close the message and open the Precision Report canvas.


4. If it is not already highlighted, click *REGION* under the Data Matrix layer in the Layers tab. The REGION object is displayed as a highlighted placeholder in the Precision Report canvas.
5. Double-click the REGION object in the Precision Report canvas. A hand icon displays, indicating that the region is in selection mode.
6. Click the *Fields* tab. Select a field for the report, and drag it into the region. Repeat this for all of the desired fields. You may resize the region placeholder as needed.
7. Click Save.

Procedure: How to Design the Page Layout for Precision Reports

Once the precision report has been built in the Data Matrix layer, you may design the page layout using the Page layer. Objects you add to the page layer appear on each page of the report at run time. You may add a box, line, or image to the page layer.

You can begin this procedure by opening the report you saved from the previous procedure [How to Build a Report in the Data Matrix Layer](#) on page 282.

1. From the Layers tab, click the *Page* layer to toggle to edit mode.
2. On the Tools tab, in the Objects group, click *Add Line*.


The pointer changes to an arrow over a line segment .

3. Drag the pointer to create a line.

Change the line color and style on the Tools tab, in the Default Style group.

Tip: After the line object has been added to the page layer, you may use the Properties tab to change the appearance of the line.

4. On the Tools tab, in the Objects group, click *Add Image*.

The pointer changes to an arrow over a flower .

5. Click the canvas or drag the pointer to create a box.

The Open File dialog appears.

6. Select the desired image file, such as a company logo, and click *OK*.

The image appears on the page. Resize it as needed.

Note: You can click *Select Object* to toggle off the *Add Image*.

As objects are added to the page layout, they appear under the Page layers.

7. Click *Save*.


When you run the report, the items added to the page layer appear on every page of the report output.

Procedure: How to Add Heading or Footing Layers in the Precision Report Layout

Once the precision report has been built in the Data Matrix layer, you may add Heading and Footing objects as placeholders for fields on your form.

You can begin this procedure by opening the report you saved from the previous procedure [How to Design the Page Layout for Precision Reports](#) on page 283.

1. From the Layers tab, click the *Report Footing* layer to toggle to edit mode to add an object to the report footing. Similarly, you could select the *Report Heading*, *Page Header*, or *Page Footer* layer.
2. On the Tools tab, in the Objects group, click *Add Box*.

The pointer changes to an arrow over a box .

3. Click the canvas or drag the pointer to create a box.

Note: Objects snap to the grid for perfect alignment.

Change the color and style of the box on the Tools tab, in the Default Style group.

Tip: After the box object has been added to the page layer, you may use the Properties tab to change the appearance of the box.

As items are added, they appear under the Heading/Footing layers.

4. Click *Save*.

Optionally, you can use the Layers tab to move or delete layer objects.


Procedure: How to Add Embedded Fields in the Heading/Footing Text Objects

You may embed fields and variables in your Heading/Footing layers as text objects. The precision report retrieves the value for the field when the report is run.

Note: Values for embedded fields are calculated differently in Heading and Footings. Headings use the first value on the page of the report, and Footings use the last value on the page of the report.

You can begin this procedure by opening the report you saved from the previous procedure [How to Add Heading or Footing Layers in the Precision Report Layout](#) on page 284.

1. From the Layers tab, click the *Report Heading* layer to toggle to edit mode to add a text object to the report heading. Similarly, you could select the *Page Header*, *Page Footer*, or *Report Footing* layer.
2. On the Tools tab, in the Objects group, click *Add Text*.

The pointer changes to as an arrow over a letter T .

3. Click the canvas or drag your pointer to create a box, indicating where you want the text to appear in the canvas. Type the desired text. Place the cursor at the position in the text where you want to embed the value.
4. Double-click a field from the Fields tab in the Precision Report canvas.

This includes Report Variables, Computed, and Defined fields.

The field is added to the text object as `<FIELDNAME`.

5. Optionally, you may also perform a calculation on a field value in the text object:
 - a. Highlight `<FIELDNAME` in the text object.
 - b. Right-click and choose *Prefix Operators* and the desired operator from the context tab.

Tip: The list of available operators adjusts to show those that are appropriate for the type of field you select.

Procedure: How to Control Spacing Between Wrapped Lines

You can use the Wrap Gap option in a style sheet to control spacing between wrapped lines in PDF and PostScript report output. The Wrap Gap option is available only for an active object of type *Data*.

You can begin this procedure by opening the report you saved from the previous procedure [How to Add Embedded Fields in the Heading/Footing Text Objects](#) on page 285.

1. On the Report tab, in the Style group, click the *Report Width* button.
2. The Width Options dialog box opens.
3. From the drop-down menu, click *Wrap*.
4. Click the *ON* radio button to enable the Wrap Gap option.

Type the number of inches to leave between wrapped lines and click *OK*.

5. Click *Save*.

Procedure: How to Run Different Compositions for the Precision Report

You may run the precision report with different composition templates. Composition templates enable you to run the same precision report with different attribute values.

This can be beneficial if you need to run a precision report with modifications for internal and external use. For example, you have an internal report that shows your trademark image in the Report Heading Layer. You can create a composition template that hides your trademark image for an external customer.

You can begin this procedure by opening the report you saved from the previous procedure [How to Control Spacing Between Wrapped Lines](#) on page 285.

1. On the Positioning tab, in the Composition group, note that *DEFAULT* is displayed as the Composition Name.
2. To create an additional composition template, click *Add Composition*. Note the new composition name derived by the system is *COMP00*. You can rename the composition by typing over the old one in the Composition Name field.
3. Select the *Properties* tab and expand the *IMAGE* section. For the Visible attribute, change the value to *No*.
4. Click *Save*.

The composition template is added to the selection list. The template in this example hides the image in the precision report. When the report is run under the *DEFAULT* template, the image will appear. When it is run under the *COMP00* template, the image will not appear.

To delete a composition template, select it from the Composition Name drop-down list and click the *Remove Composition* command.

Editing a Precision Report to Fit a Form

After you create a precision report, you may need to edit the formatting of it to fit perfectly on a preprinted form. The Properties tab of the Precision Report canvas makes it easy to fine-tune the output to match your form.

Example: Matching Output to a Preprinted Form

The following example shows how to edit a precision report to match a preprinted form.

1. Open the desired precision report. On the Format tab, Output Types group, click *Output Format*. Click *DHTML*, *PDF*, or *PS* (PostScript).
2. On the Format tab, Output Types group, click *Output Format Options*. The Output Format Options dialog box appears.
3. Select the option values that will best assist in matching your form and click *OK*.

Note: Matching output to your preprinted form is an iterative process that will progress through trial and error.

Click *Save*.

4. Put your preprinted form in your printer and print a single page of output from the precision report. View the results.
5. Open the precision report. If you need to adjust the alignment of data columns, Open the Properties tab and expand the REGION area. The Position attribute shows four values.
 - ☐ The first number (192 in the example above) controls the left side of the region box.
 - ☐ The second number (132 in the example above) controls the top of the region box.
 - ☐ The third number (588 in the example above) controls the right side of the region box.
 - ☐ The fourth number (276 in the example above) controls the bottom of the region box.

You can edit the numbers to move the region with great accuracy in matching your form.

In addition to the REGION attribute, you can also fine tune the TEXT attribute as described above.

6. Edit the precision report, save it, and print it on your form again until the alignment is correct.

Joining Data

You can join two or more related data sources to create a larger integrated data structure from which you can report in a single request. The joined structure is virtual. It is a way of accessing multiple data sources as if they were a single data source. Up to 511 joins can be in effect at one time, for a total of 512 segments, depending on the number of active segments and the number and length of the fields (there is a 256K limit on the length of all fields). Joined files remain physically separate, but are treated as one data source structure throughout the session or until you clear the join.

You can also create a new file structure for reporting by joining existing synonyms of relational tables using the Cluster Joins editor.

What Is a Join?

A join is a temporary connection between two or more data sources, based on a shared field or on a condition you specify in the JOIN command. For example, since the wf_retail_sales data source includes an ID_STORE field and the wf_retail_store data source also includes an ID_STORE field, you can join the two data sources.

The field type must be the same for the common fields, but the field name and field format do not need to be the same.

After you join two files, each time a record is retrieved from the first file (host data source), it also retrieves the matching records from the second file (cross-referenced data source).

Creating Joins Using Join Functionality

The following section describes the types of joins you can create using the Join functionality.

- ❑ **Equijoin.** Used to join two or more data sources that share at least one field and create a virtual structure for reporting.
- ❑ **Conditional join (WHERE-based).** Uses expressions to specify joins based on conditional criteria, not just on equality between fields.
- ❑ **Join based on virtual fields (DEFINE-based).** Uses virtual host fields that you can join to real cross-referenced fields.
- ❑ **Left outer join.** Returns all matching rows, in addition to all rows from the host data source that lack corresponding cross-referenced rows.
- ❑ **Full outer join.** Returns all rows from the host data source and all rows from the cross-referenced data source. Full outer joins are supported for use with relational data sources that support this type of join.

Creating an Equijoin

You can use an equijoin structure if you need to join two or more data sources that have two fields, one in each data source, with formats (character, numeric, or date) and values in common.

Joining a store ID field in a sales data source (host data source) to the store ID field in a store data source (cross-referenced data source) is an example of an equijoin.

Creating a Join Based on Conditional Criteria

Conditional joins use WHERE-based syntax to specify joins based on conditional criteria, not just on equality between fields. Additionally, the host and cross-referenced join fields do not have to contain matching formats.

Suppose you have a data source that lists stores by their ID number (the host data source) and another data source that lists sales for each store ID by date (the cross-referenced data source). Using a conditional join, you can join the store ID in the host data source to the store ID in the cross-referenced data source to determine which stores had sales in a given date range (the WHERE condition).

Specifying a Single (Unique) and Multiple (Non-Unique) Instance Join

When you create a join using the Join functionality, you can specify whether the join is a single instance or a multiple instance.

- ❑ A single instance, or one-to-one join structure matches one value in the host data source to one value in the cross-referenced data source.

Joining a store ID field in a sales data source (host data source) to the store ID field in a store data source (cross-referenced data source) is an example of a one-to-one join structure.

- ❑ A multiple instance or one-to-many join structure matches one value in the host data source to multiple values in the cross-referenced data source.

Suppose you have a data source that lists stores by their ID number (the host data source) and another data source that lists products sold for each store ID (the cross-referenced data source). Joining one instance of each store ID in the host data source to the multiple store IDs in the cross-referenced data source is an example of a one-to-many join structure and would result in a listing of all products sold for each store ID.

Creating a Join Based on Virtual Fields

Joins that are based on virtual fields use DEFINE-based syntax to create a virtual field in the host data source that you can then join to a real cross-referenced field. The DEFINE expression that creates the virtual host field may contain only fields in the host data source and constants. It may not contain fields in the cross-referenced data source.

You can join a virtual field to more than one real field in more than one cross-referenced data source using separate Join commands, each referring to the same host data source.

Creating a Left Outer Join

When a report omits host rows that lack corresponding cross-referenced rows, the join is called an *inner join*. When a report displays all matching rows, in addition to all rows from the host data source that lack corresponding cross-referenced rows, the join is called a *left outer join*.

For details on left outer join syntax, see the *Creating Reports With WebFOCUS Language* manual.

Creating a Full Outer Join

The WebFOCUS Join command and conditional join command have a Full Outer Join option.

A full outer join returns all rows from the host data source and all rows from the cross-referenced data source. Where values do not exist for the rows in either data source, null values are returned. WebFOCUS substitutes default values on the report output (blanks for alphanumeric columns, the NODATA symbol for numeric columns).

The full outer join is only supported for use with those relational data sources that support this type of join, in which case the WebFOCUS Join syntax is optimized (translated to the full outer join SQL syntax supported by the RDBMS). Use of this syntax for any data source that does not support a full outer join, or the failure of the request to be optimized to the engine, produces an error message.

For details on full outer join syntax, see the *Creating Reports With WebFOCUS Language* manual.

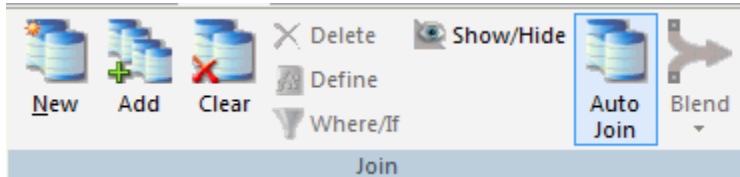
Manipulating Data Sources in a Join Using the Join Tab

You can use the Join tab to manipulate data sources when using a join. The Join tab is available only when you are creating a join.

After you join two files, each time a record is retrieved from the first file (host data source), the matching records from the second file (cross-referenced data source) are also retrieved.

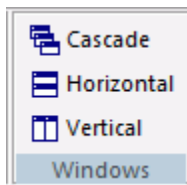
Joining Data Sources Using the Join Group

Using the Join group, you can create a new join, add a new data source to the join, clear a join, insert a Define field into a join, create a conditional join, show or hide the procedure (fex) window, perform an automatic join within tables, or blend data sources. The Join group is shown in the following image.



Displaying Data Sources in the Join Using the Windows Group

You can choose how to display the data sources currently in the join as cascading overlapping tiles (default), horizontal tiles that do not overlap, or vertical tiles that do not overlap. The Windows group is shown in the following image.



Creating a Join Using the Join Canvas

You can use the Join canvas to join two or more data sources. The Join component provides a graphical method for creating and manipulating all types of joins. To create a join, you must specify a host data source, and then a cross-referenced data source.

You are responsible for placing the Join object in the correct position within your procedure (that is, before a Define, Report, or Chart), and running it. The join remains active for the entire session, unless you explicitly clear it.

After a join exists, you can retrieve it, report from it, view its syntax, and clear it.

Procedure: How to Create an Equijoin

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Join after, point to *New* and click *Join*.

3. Select a Master File (host data source), for example, wf_retail_sales, and click OK.

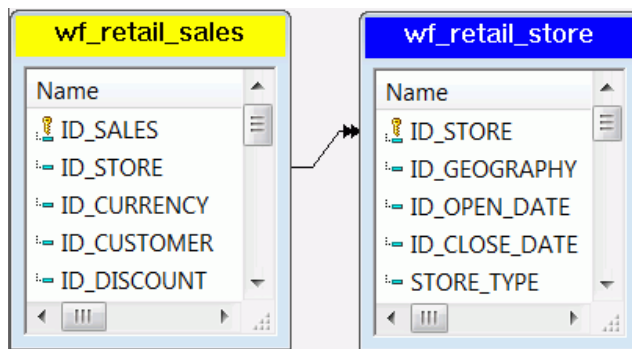
The Join canvas opens and displays the fields in the Master File.

4. On the Join tab, in the Join group, click *Add*.

You can also right-click the Join canvas and select *Add File*.

5. Select a Master File (cross-referenced data source), for example, wf_retail_store, and click OK.

The new Master File is added to the canvas. Common fields in both files are joined by a Join connector line, as shown in the following image.



6. Click *Save*.
7. Click *Run*.

A dialog box opens, displaying the component code, and either an error message or text stating that no error exists.

8. Click *OK* and close the Join canvas.

You can add another component to the procedure by right-clicking the *Join* component, pointing to *New*, and clicking the component. When you are prompted to select a Master File, select the same host file you used to create the Join component. This allows you to use the joined data sources.

The following is the WebFOCUS Join syntax that is created:

```
JOIN WF_RETAIL_SALES.WF_RETAIL_SALES.ID_STORE IN wf_retail_sales
TO WF_RETAIL_STORE.WF_RETAIL_STORE.ID_STORE IN wf_retail_store AS J0
END
```


Creating Multi-Field Joins

In some cases, you might want to join more than one host field to one or more cross-referenced fields.

There are two types of multi-field joins:

- ❑ Multi-field joins in which you join multiple host fields to multiple cross-referenced fields.
- ❑ Concatenated joins in which the field resulting from the concatenation of two host fields is joined to a single cross-referenced field.

Creating a Virtual Field as the Join Field

You can create a virtual host field that you can join to a real cross-referenced field.

Procedure: How to Use a Virtual Field as the Join Field

1. Open an existing procedure or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Join after, point to *New*, and click *Join*.
3. Select a Master File (host data source) and click *OK*.

The Join canvas opens and displays the fields in the Master File.

4. On the Join tab, in the Join group, click *Define*.

The Join Define in File dialog box opens.

5. You must associate the virtual field with a segment of the data source.
 - a. Type the name of the virtual field you are going to define in the Define Field box.
 - b. In the With Field drop-down list box, choose the name of *any* real field from the segment in which you want to put the virtual field and click *OK*.

The virtual field appears in the Fields window of the host data source.

6. On the Join tab, in the Join group, click *Add*.

You can also right-click the Join canvas and select *Add File*.

7. Select a Master File (cross-referenced data source) and click *OK*.

The new Master File is added to the canvas. Delete any existing Join connector lines.

8. To complete the Join, drag the mouse pointer from the virtual field to a matching field in the cross-referenced data source.

You cannot join multiple fields with this option. The virtual field must be the only Join field.

Creating Conditional Joins

Using conditional joins, you can establish joins based on conditions other than equality between fields. In addition, the host and cross-referenced join fields do not have to contain matching formats and the cross-referenced field does not have to be indexed.

Because each data source differs in its ability to handle complex conditional criteria, the optimization of the WHERE syntax differs depending on the specific data sources involved in the join and the complexity of the conditional criteria.

To display a list of joined data sources, select the following query subject in the Query tool, or issue the command from the Command Console:

? JOIN

This query displays every join currently in effect and indicates any that are based on conditional criteria.

Procedure: How to Create a Conditional Join

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the join after, point to *New*, and click *Join*.
3. Select a Master File (host data source) and click *OK*.

The Join canvas opens and displays the fields in the Master File.

4. On the Join tab, in the Join group, click *Add*.

You can also right-click the Join canvas and select *Add File*.

If you are developing in the Data Servers area or in the Repository, a WebFOCUS Table List dialog box opens. If you are developing in the Projects area, the Open dialog box opens.

5. Select a Master File (cross-referenced data source) and click *OK*.

The new Master File is added to the canvas. Common fields in both files are joined by a Join connector line.

6. Select the Join (the connector line), and on the Join tab, click *Where/If*.

The Where Expression Builder dialog box opens.

7. After you have specified your WHERE criteria, click *OK* to return to the Join tool.

If you need to change the join type or join name, double-click the conditional join to launch the Join Properties window.

Customizing a Join

You can customize an existing join by changing the files or fields involved. If no default join was created, you can use the same technique to specify a connection explicitly.

You can also change the join name, make the join a single instance, use a virtual field as the join field, and add tag names to the join files.

Procedure: How to Remove a Data Source From the Join

1. Click the data source you want to remove.
2. Press the Delete key. A confirmation dialog box appears.

If you delete the host data source, all cross-referenced data sources are automatically deleted.

Procedure: How to Delete a Join

1. Right-click the Join connector line.
2. From the shortcut menu, click *Delete*.

You can also select the Join connector line, and on the Join tab, in the Join group, click *Clear*, or press the Delete key.

The data sources remain on the canvas with no connector line between them.

Procedure: How to Specify Join Fields

To create your own join (after deleting the existing join, if necessary):

1. Select a field in the host data source panel.
2. Click and hold the selected field.
3. Drag the selected field from the host data source panel onto the matching field located in the cross-referenced data source panel. The pointer changes and displays the appropriate icon when a join is possible.
4. Release the mouse button.

A Join connector line appears.

Procedure: How to Create Additional Joins

You can leave the Join window open and create another Join by:

- ❑ Clicking *New* on the ribbon.
- ❑ Clicking *New Join* from the shortcut menu on the Join canvas.

You can define up to 511 concurrent Joins that will have a maximum of 512 segments in the new Join structure.

Procedure: How to Make a Join a Single Instance

By default, each join is a multiple instance.

To make the join a single instance:

1. Right-click the Join connector line.
2. From the shortcut menu, click *Single Instance*.

Changing the Join Name

A default name is automatically assigned to each join.

You can use the Join name to later clear the join and to prevent another join from overwriting it. If you remove the Join name completely, any subsequent unnamed join will overwrite this join.

Procedure: How to Change or Remove the Default Join Name

1. Right-click the Join connector line and from the shortcut menu, click *Join Name*.

The Join Name dialog box displays the default Join name.

2. Edit or delete the name in the Join Name box and click *OK*.

You can also provide a description. This is not used in the Join command, but for reference purposes. A comment (-*) is added to the procedure. For example, -*JOINDESC J0.

Note: The following reserved words cannot be used as a Join name: ALL, AND, AS, IN, JOIN, TAG, TO, WITH.

Procedure: How to Display Current Join Structures

To display a list of joined data sources, issue the following command from the Command Console:

? JOIN

This command displays every join currently in effect.

Adding a Tag Name

Tag names provide a way of distinguishing between identical field names in the host and cross-referenced data sources. They function as aliases for the file names in the join. Tag names are useful when you join a file to itself because in such a join all field names, segment names, and file names are the same in the host and cross-referenced data sources. Tag names are also useful if a file is used as a target more than once in the join structure.

A procedure can use the tag name of a data source as a qualifier for field names and aliases.

If you create a report using a recursive join *without* tag names, the field names in the cross-referenced data source are prefixed with the first four characters of the Join name.

Procedure: How to Add a Tag Name

1. Double-click the connector line between the tables. The Join Properties dialog box opens.

The Join Properties dialog box also opens if you right-click a selected link, and click *Properties* on the shortcut menu. A thick line appears when a join is selected.

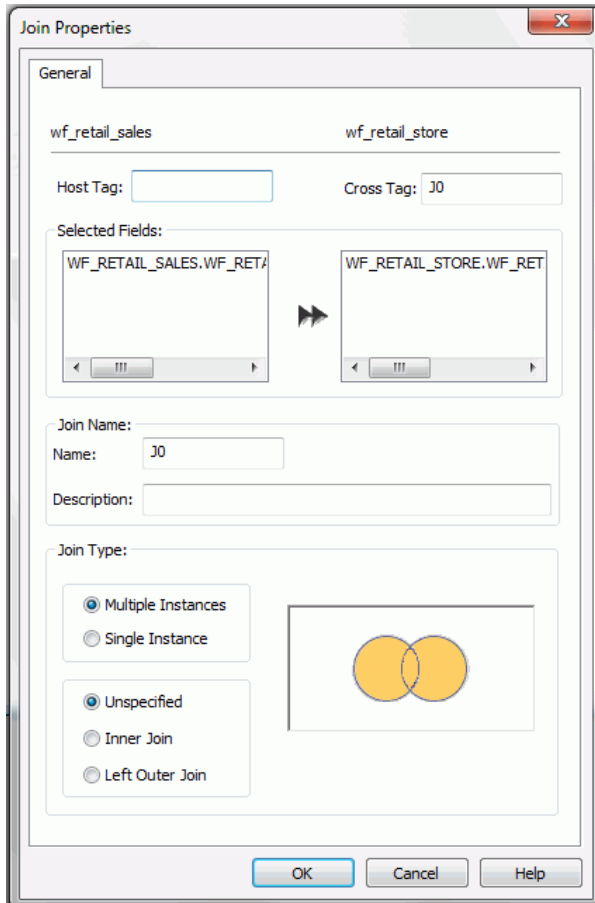
2. Enter names in the Host Tag and Cross Tag name fields and click OK.

Note:

- ❑ The following reserved words cannot be used as a tag name: ALL, AND, AS, IN, JOIN, TAG, TO, WITH.
- ❑ Tag names can be up to eight characters in length.

Reference: Join Properties Dialog Box

To view or modify the properties of a Join, right-click the Join link and select *Properties*, or double-click the Join link. The Join Properties window appears, as shown in the following image.



The Join Properties window has the following fields and options:

Host Tag

Enter a tag name for the data source.

Cross Tag

Enter a tag name for the cross-referenced file.

Selected Fields

Displays the field that has been joined from the host file to the cross-referenced file. A single arrow indicates a unique Join, and a double-arrow indicates a non-unique Join.

Join Name

Displays the name of the Join. To change the default Join name, type a new name in this field and click OK.

Note: The Join name must be unique and cannot exceed eight characters.

Description

Enter a description. This is not used in the Join command. It is used for reference purposes. A comment (-*) is added to the procedure.

Join Type

Indicates the type of Join. Choose from the following:

Multiple Instance (Non-Unique). A one-to-many Join structure that matches one value in the host data source to multiple values in the cross-referenced field. Joining employee ID in an employee data source to employee ID in a data source that lists all the training classes offered by that company would result in a listing of all courses taken by each employee, or a joining of the one instance of each ID in the host file to the multiple instances of that ID in the cross-referenced file. This is the default selection.

Single Instance (Unique). A one-to-one Join structure that matches one value in the host data source to one value in the cross-referenced data source. Joining an employee ID in an employee data source to an employee ID in a salary data source is an example of a unique Join.

Unspecified. This option is selected in the Join properties when a Join that was created in an earlier release is opened in the Join tool. In earlier versions, the defaults for Join type and other operators were assumed and not specified in the generated code. Since the Join tool cannot determine the type of Join that was created and if there were other commands set to control the Join, select the appropriate options (Inner Join, Left Outer Join, Multiple Instances, Single Instances) from the Join tool to upgrade the generated code.

Inner Join. A Join that results when a report omits host rows that lack corresponding cross-referenced rows.

Left Outer Join. Extends the results of an Inner Join and retrieves records from both host and cross-referenced tables, including all records from the left table (host) and any records from the right table (cross-referenced) where the condition values match. If there are no matching values in the cross-referenced table, the Join still retrieves records from the host table.

Blending Data

The blend option allows a new external fact table, for example an uploaded Excel worksheet, to be added to a multi-segment master as a parent of an existing child segment.

You may want to blend data if you are reporting from two different fact tables that share a common dimension, such as a product dimension.

The following are some general rules that apply to the Blend option:

- ❑ The result of blending is that a single dimension is shared between two fact tables. The table must be based on a cluster with at least two segments. One segment is for Fact table 1, the second segment is for the dimension.
- ❑ Do not use the fields from the blended table as a sort field, since these fields will not have common field when used with fields from other fact tables.

Procedure: How to Blend Data Using WebFOCUS Syntax

You can blend data using the following JOIN AS_ROOT command, which you can type into a procedure using the Text Editor. In this example, the Projected Excel worksheet is added as a parent of the wf_retail Product dimension. The report output contains field values from the wf_retail_sales fact table and the Projected Excel worksheet for each product category.

```
JOIN AS_ROOT PRODUCT_CATEGORY IN WF_RETAIL TO UNIQUE PRODUCT_CATEGORY IN
PROJECTED
END
TABLE FILE wf_retail
SUM REVENUE_US
PROJECTED_COG
PROJECTED_SALE_UNITS
BY PRODUCT_CATEGORY
END
```

PAGE 1			
Product Category	Revenue	Projected COG	Projected Sale Units
Accessories	\$499,551.40	90,427,076.00	365717
Camcorder	\$667,254.48	105,615,828.00	325288
Computers	\$179,761.46	70,468,086.00	251911
Media Player	\$1,009,790.56	191,631,034.00	551088
Stereo Systems	\$1,216,393.89	206,563,759.00	795024
Televisions	\$286,160.68	62,014,388.00	75083
Video Production	\$259,179.84	40,380,803.00	142594

Note: This JOIN AS_ROOT option will be available from the Join canvas in App Studio Release 8.2.

Styling Reports

A report consists of several components, each of which can you can format or style. App Studio is installed with a set of StyleSheet files, each of which has a distinctive theme. You can select one of these themes for your output and you can customize selected report components individually. You can create your own styles or use the themes included with App Studio.

Using a styling theme is an excellent way to easily style many different aspects of a report, for example, headings, footings, column titles, backgrounds, fonts, grids, borders, images, and so on. Many companies apply standard style themes to their reports so all of their reports look consistent and professional.

A style theme, once it is applied to a report, is used every time the report is run. If you want to display some of the data differently, you can customize individual styles either for all data or for data that satisfies specific criteria (called conditional styling or Traffic Lighting).

Styling Characteristics

The physical characteristics of a style for a report component consist of the following basic attributes:

- ❑ **Text font.** You can use different fonts and font sizes, and selectively apply text styles, such as bold or italic.
- ❑ **Color.** You can select a color for the text or background.
- ❑ **Conditional styling.** You can apply different styles to the same component based on report values.
- ❑ **Column widths.** You can have column widths based on the column content, the field format specified in the Master File, or specify a width.
- ❑ **Column placement.** You can specify the starting position of individual columns and arrange columns in any order regardless of the sequence established in the report request. In addition, you can indicate how much space to leave before and after individual columns.
- ❑ **Page size.** You can select from a wide range of page sizes for PostScript and PDF reports.
- ❑ **Page orientation.** You can select either portrait or landscape for PostScript, PDF, and EXL2K reports.
- ❑ **Page margins.** You can specify the top, bottom, left, and right margins, measured in inches, centimeters, or points for PostScript and PDF reports.
- ❑ **Justification.** You can justify individual report components.
- ❑ **Grids, borders, and images.** You can emphasize headings, footings, and column titles in a report by adding borders and grid lines around them. You can add and position images in a report. An imaged, such as a logo gives corporate identity to a report, or provides visual appeal.

Introducing StyleSheets

A StyleSheet describes how you want your report to look. You can create a StyleSheet within a report request (useful when you are applying a set of styles to only one report) or as a separate file (useful when you want to create a StyleSheet theme that you can apply to any report). In addition, you can create a StyleSheet on one platform and then port it to, and run it on, other platforms.

You use the Style group, on the Report tab, to apply stylistic changes to a report, including data, title, and all other components of the report. The commands are:

- ❑ **Change Theme.** Changes the theme of the report from a list of available StyleSheets.
- ❑ **Manage Theme.** References or embeds an external StyleSheet or applies no styling to your report. When you click this button, the StyleSheet Selection dialog box opens. If you do not select a StyleSheet, a default StyleSheet is applied.
- ❑ **Save Theme.** Saves your current style options as a stylesheet file (.sty) for future use.

A StyleSheet consists of set of declarations, which:

- ❑ Identify a report component or subcomponent.
- ❑ Describe the formatting to apply to that component.
- ❑ Optionally, if the component is a heading, footing, or column, specify a position and justification for the component.
- ❑ Optionally, specify the distance between columns, column sequence, and column width.
- ❑ Optionally, specify a condition that must be true in order to apply the style. This technique is called conditional styling (Traffic Lighting).

In your StyleSheet, you only need to include declarations for those components whose format you want to change. Within each declaration, you only need to include those attributes you want to change.

Each declaration in a StyleSheet consists of attribute=value pairs separated by commas, and terminated with a comma and dollar sign (,\$). The syntax is:

```
TYPE=component, attribute=value, ... , $
```

For example:

```
TYPE=Report, FONT=Times, SIZE=10, $
TYPE=Data, COLUMN=REVENUE_US, BACKCOLOR=Aqua, COLOR=Navy, STYLE=Bold,
  WHEN=REVENUE_US GT 500, $
TYPE=Title, FONT='Helvetica', $
TYPE=Heading, FONT='Helvetica', STYLE=Bold, SIZE=14, JUSTIFY=Center,
  BACKCOLOR=Dark Turquoise, COLOR=White, $
TYPE=Heading, LINE=6, BACKCOLOR=White, COLOR=Dark Turquoise,$
```

Procedure: How to Select a Styling Theme

The following procedure shows you how to change the default style to a predefined theme.

1. On the Home tab, in the Content group, click *Report*.

The Report Wizard opens.

2. Click *Create Report*.

The Selecting Data Source window opens.

3. Select the *wf_retail.mas* data source and click *Finish*.

The Report canvas opens.

4. Select the *Full Name*, *Product Name*, and *Revenue* fields and click *Run* on the Quick Access toolbar to view the report with no conditional styling.

Full Name	Product Name	Revenue
Aaliyah Akhtar	Pioneer BDP-330 Region Free Blu Ray DVD Player	\$699.99
Aaliyah Little	Polk Audio RM705 5.1-Channel Home Theater Speaker System - Black	\$249.99
Aaliyah Stone	Sony BDP-5370 Region Free Blu Ray DVD Player	\$359.99
Aaron Gregory	Yamaha RX-V3900 7.1-Channel Network Home Theater Receiver	\$1,189.00
Aaron Markley	Panasonic DMP-BD60 Region Free Blu Ray DVD Player	\$559.98
Aaron Shaffer	Panasonic HM-TA1 High Definition Mobile Camera - Red - HM-TA1PP-R	\$288.91
Abbey Sparkes	Canon FS300 Ultra Sleek camcorder-rd	\$599.98
Abby Dickinson	Sony MDR-V900HD Pro Style Headphones	\$336.00
Abdelhadi van Grinsven	Sanyo VPC-CG20BK Full HD 1080 Video & 10MP Digital Photos Camcorder	\$359.98
Abdul-Azim Wasem	Sony BDP-5370 Region Free Blu Ray DVD Player	\$899.98

5. On the Report tab, in the Style group, click *Change Theme*.
6. In the Open File dialog box, click the *Predefined Template Files* folder.

7. From the list of style files in the right pane, locate and select a template file, for example, *ENBlue_Light1.sty*. The report styling in the canvas automatically changes, as shown in the following image.

Full Name	Product Name	Revenue
Aaliyah Akhtar	Pioneer BDP-330 Region Free Blu Ray DVD Player	\$699.99
Aaliyah Little	Polk Audio RM705 5.1-Channel Home Theater Speaker System - Black	\$249.99
Aaliyah Stone	Sony BDP-S370 Region Free Blu Ray DVD Player	\$359.99
Aaron Gregory	Yamaha RX-V3900 7.1-Channel Network Home Theater Receiver	\$1,189.00
Aaron Markley	Panasonic DMP-BD60 Region Free Blu Ray DVD Player	\$559.98
Aaron Shaffer	Panasonic HM-TA1 High Definition Mobile Camera - Red - HM-TA1PP-R	\$288.91
Abbey Sparkes	Canon FS300 Ultra Sleek camcorder-rd	\$599.98
Abby Dickinson	Sony MDR-V900HD Pro Style Headphones	\$336.00
Abdelhadi van Grinsven	Sanyo VPC-CG20BK Full HD 1080 Video & 10MP Digital Photos Camcorder	\$359.98

Procedure: How to Apply a Style Theme Using WebFOCUS Syntax

The following request applies the *enblue_light1* theme to the report output. The `ON TABLE SET STYLE *` and `ENDSTYLE` commands indicate the beginning and the end of an inline StyleSheet.

```
TABLE FILE WF_RETAIL
SUM REVENUE_US
BY FULLNAME
BY PRODUCT_NAME
ON TABLE SET HTMLCSS ON ON TABLE SET STYLE *
INCLUDE = enblue_light1,
$
ENDSTYLE
END
```

Procedure: How to Create a StyleSheet in a Report Request

You can use the following commands in a report request to create a StyleSheet to indicate the beginning and the end of an inline StyleSheet:

```
ON TABLE SET STYLE *
.
.
.
ENDSTYLE
```

For example, in the following report request, the StyleSheet syntax appears in bold.

```
TABLE FILE WF_RETAIL
SUM REVENUE_US BY FULLNAME BY PRODUCT_NAME ON TABLE SET STYLE *
TYPE=REPORT, FONT=ARIAL, SIZE=10, $
TYPE=REPORT, COLUMN=REVENUE_US, COLOR=RED, $
TYPE=REPORT, COLUMN=FULLNAME, COLOR=BLUE, $
TYPE=REPORT, COLUMN=PRODUCT_NAME, COLOR=GREEN, $
ENDSTYLE
END
```

The request produces the following report, in which the font for the entire report is Arial 10, the Full Name column is blue, the Product Name column is green, and the Revenue column is red.

Full Name	Product Name	Revenue
Aaliyah Akhtar	Pioneer BDP-330 Region Free Blu Ray DVD Player	\$699.99
Aaliyah Little	Polk Audio RM705 5.1-Channel Home Theater Speaker System - Black	\$249.99
Aaliyah Stone	Sony BDP-S370 Region Free Blu Ray DVD Player	\$359.99
Aaron Gregory	Yamaha RX-V3900 7.1-Channel Network Home Theater Receiver	\$1,189.00
Aaron Markley	Panasonic DMP-BD60 Region Free Blu Ray DVD Player	\$559.98
Aaron Shaffer	Panasonic HM-TA1 High Definition Mobile Camera - Red - HM-TA1PP-R	\$288.91
Abbey Sparkes	Canon FS300 Ultra Sleek camcorder-rd	\$599.98
Abby Dickinson	Sony MDR-V900HD Pro Style Headphones	\$336.00
Abdelhadi van Grinsven	Sanyo VPC-CG20BK Full HD 1080 Video & 10MP Digital Photos Camcorder	\$359.98
Abdul-Azim Wasem	Sony BDP-S370 Region Free Blu Ray DVD Player	\$899.98
Abdul-Qawi Moghadam	Bluetooth Audio Streaming, MEGA BASS, Speaker Dock	\$127.95

Conditionally Formatting Components in a StyleSheet

You can conditionally format report components or display a graphic in your report based on the values in your report. Using conditional styling, you can:

- ☐ Draw attention to particular items in the report.
- ☐ Emphasize differences between significant values.
- ☐ Customize the resources to which an end user navigates from different parts of the report.

Procedure: How to Use the Traffic Lighting Feature to Set Conditional Styling

This procedure shows how you can use the Traffic Lighting feature to set styling in your report based on conditions that you define. This example will use a red background to highlight revenue amounts that are less than 500.

1. On the Home tab, in the Content group, click *Report*.

The Report Wizard opens.

2. Click *Create Report*.

The Report Wizard - Select Procedure Location window opens.

3. Select a location for your report and click *Next*.

The Report Wizard - Select a master file window opens.

4. Select the *wf_retail.mas* data source and click *Finish*.

The Report canvas opens.

5. Select the *Customer Full Name*, *Product Name*, and *Revenue* fields and click *Run* on the Quick Access toolbar to view the report with no conditional styling.

6. Return to the Report canvas to create a condition for the *Revenue* field, for which you will later specify styling.

7. On the Report tab, in the Traffic Lights group, click the drop-down list box and select *Add/Edit Conditions*.

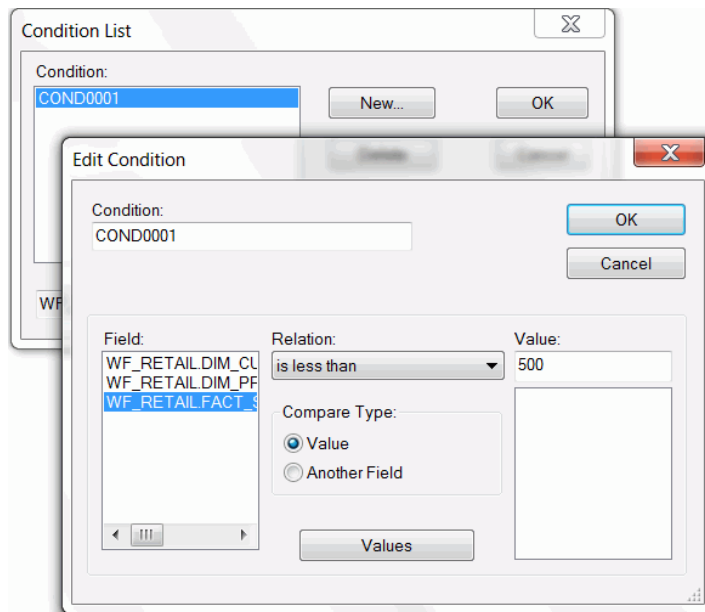
The Condition List dialog box opens.

8. Click *New*.

The Edit Condition dialog box opens. In the Condition field, a default name *COND0001* is specified for your new condition, which you can change as required.

9. Complete the Edit Condition dialog box as shown in the following image.

- ☐ Select *Revenue* for the field.
- ☐ Select *is less than* for the Relation.
- ☐ Select *Value* for the Compare Type.
- ☐ Type *500* for the Value.



10. Click *OK* to save your new condition and close the Edit Condition dialog box.

You are returned to the Condition List dialog box. Notice that the new condition *COND0001* is now listed.

11. Click *OK*.
12. Select *COND0001* from the Traffic Lights drop-down list box to specify styling for the new condition.
13. On the Report tab, in the Style group, set the background color to red.

Note that the red background displays as a preview in the Report canvas when *COND0001* is selected.

14. Click *Run* on the Quick Access toolbar to view the report with conditional styling.
Note that only the Revenue amounts below 500 appear with the red background, as shown in the following image.

Customer Full Name	Product Name	Revenue
Abadie, Adonis	Panasonic DMP-BD60 Region Free Blu Ray DVD Player	503.98
	Panasonic TC-P46G25 46 Class Viera G25 Series 1080p Plasma HDTV	999.95
Abadie, Edmond	Sony BDP-S470 Region Free 3D Blu Ray DVD Player	499.99
	Sony RDR-GX257 DVD Recorder Region 1 Playback and Region Free Recording	199.99
Abadie, Elwood	Pioneer BDP-320 Region Free Blu Ray PAL/NTSC DVD Player with World Wide Voltage	479.99
Abadie, Grady	Samsung HT-Z120 DVD Home Theatre System	219.99
Abadie, Tony	Panasonic 58TV25BNDL 3D Bundle	3,199.88
Abate, Ariel	Pioneer BDP-51 Region Free Blu Ray PAL/NTSC DVD Player with World Wide Voltage	599.99
Abate, Genaro	Panasonic SC-PT160 Region Free Home Theatre System	599.97
	Sharp HT-CN550 Region Free Home Theater System	399.98
	Sony DAV-DZ30 Region Free Home Theatre System	219.99
Abate, Joel	Panasonic 58TV25BNDL 3D Bundle	6,399.76
Abate, Kelsi	LG MDD72 Digital Mini Hi-Fi System with Dual Tape Deck	219.99
Abate, Lyndsey	SONY CD Radio Portable Boom Box	99.99
Abate, Maegan	LG 19LE5300 19 LE5300 Series 720p LED HDTV - Glossy Black/Silver Grey	349.99
	LG MDD72 Digital Mini Hi-Fi System with Dual Tape Deck	219.99
	Onkyo TX-SR876B THX Ultra2 Plus 7.1-Channel A/V Home Theater Receiver -	1,573.00
	Sony BDP-S570 Region Free Blu Ray DVD Player with 3-D and Wi-Fi	529.99
Abate, Mustafa	LG DVRK898 Region Free DVD Recorder and VCR	429.99
	Panasonic DMR-EH59 Region Free DVD Recorder with 250GB Hard Disk	739.98

Procedure: How to Set Conditional Styling Using the WebFOCUS Syntax

This request sets conditional styling to use a red background to highlight revenue amounts that are less than 500.

```
TABLE FILE WF_RETAIL
SUM REVENUE_US
BY FULLNAME
BY PRODUCT_NAME
ON TABLE SET HTMLCSS ON
ON TABLE SET STYLE *
INCLUDE = endeflt,$ TYPE=DATA, COLUMN=REVENUE_US, WHEN=REVENUE_US LT
500, BACKCOLOR='RED' ,$
ENDSTYLE
END
```

Reference: Styling Report Components

The following chart lists all report components that you can style.

TYPE	Report Component
REPORT	The entire report.
PAGENUM	Default page numbers.
TABHEADING	A heading on the first page of a report.

TYPE	Report Component
TABFOOTING	A footing on or after the last page of a report.
HEADING	Headings at the top of each report page.
FOOTING	Footings at the bottom of each report page.
SUBHEAD	Headings before a particular sort field.
SUBFOOT	Footings after a particular sort field.
DATA	Report data.
TITLE	Column titles.
ACROSSTITLE	ACROSS field names (that is, field names used in ACROSS phrases).
ACROSSVALUE	ACROSS field values (that is, values of the ACROSS field).
SUBTOTAL	Totals generated by SUBTOTAL, SUB-TOTAL, RECOMPUTE, and SUMMARIZE.
GRANDTOTAL	The last total on a report, which can either be a column total generated by COLUMN-TOTAL or a grand total generated by SUBTOTAL, SUB- TOTAL, RECOMPUTE, or SUMMARIZE.
RECAP	Lines generated by ON field name RECAP or ON field name COMPUTE.
UNDERLINE	Underlines generated by ON field name UNDER-LINE.
SKIPLINE	Skipped lines generated by ON field name SKIP-LINE.
FREETEXT	FML free text.

Detecting and Handling of Fan Traps and Chasm Traps

WebFOCUS supports complex joins between a large number of data sources. Sometimes requests against a complex join (or star schema) can cause individual columns to be aggregated multiple time, generating inflated results. These constructions are referred to as fan traps or chasm traps.

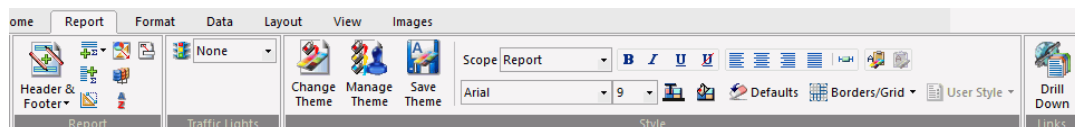
The relational adapters have a new context analysis process that detects the multiplicative effect and generates SQL script commands that retrieve the correct values for each segment context. These scripts are then passed to the RDBMS as subqueries in an optimized SQL statement.

Accessing Reporting Components With the App Studio Ribbon

The following topics describe the tabs and panels that are available when you are developing reports in the Report canvas.

Building a Report Using the Report Tab

You use the Report tab to modify report properties, change the style of rows and columns on your report, or create filters. The Report tab contains the following groups: Filter, Report, Traffic Lights, Style, and Links. The Report tab is located at the top of the App Studio interface and is available only when you are creating or working with a report. The Report tab is shown in the following image.



Defining a Filter Field Using the Filter Group

You use the Filter group to define filter fields when creating a report. The Filter group is shown in the following image.



The commands are:

Filter

Filters fields using Where, If, Where Total, and Limits screening options. You can access the Expression Builder by selecting Where, If, or Where Total from the Filter drop-down menu.

Using the Expression Builder, you can create expressions quickly by selecting fields, relations, operators, and values from lists. You can base selection criteria on a specified value, a variable value, or a field value. For more information, see [Creating Expressions Using the Expression Builder](#) on page 312.

If you select Limits, the Retrieval Limits dialog box opens, where you can set the record limit and read limit values. This enables you to set how much data is displayed or previewed.

Creating Expressions Using the Expression Builder

The Expression Builder enables you to create expressions quickly by selecting fields, relations, operators, and values from lists. You can base selection criteria on a specified value, a variable value, or a field value.

You can access the Expression Builder by clicking *Where*, *If*, or *Where Total* from the Filter drop-down menu. The Expression Builder dialog box displays.

The Expression Builder is divided into four sections. The Data section is located in the upper-left of the Expression Builder. The Criteria section is located to the lower-left of the Expression Builder. The Expression Grid is located to the upper-right of the Expression Builder. The Advanced section is located in the lower-right of the Expression Builder.

The Data section displays a list of all fields in the data source. Double-click or drag the field into the Expression Grid to build an expression using the options provided. You can also drag fields to the Criteria section and the Advanced section, once it is enabled.

The Criteria section displays which expression you are working on, as well as which expressions, of the same type, you have already created. If you double-click a field and it is added to the Expression Grid, the field will be shown in the Criteria section. Alternatively, you can drag a field into the Criteria section to begin working on a new expression. Dragging more than one field into the Criteria section allows you to create multiple of whatever type of statement you selected (Where, If, or Where Total). For example, if you clicked Where to open the Expression Builder, dragging more than one field into the Criteria section will create multiple Where expressions. Selecting an expression in the Criteria section will show you the details of that expression in the Expression Grid and/or the Advanced section.

Note: The type of expression you are creating is shown next to the Criteria section.

The Advanced section is where, instead of creating an expression using the Expression Grid, you are creating the expression using syntax. The Advanced check box is only available to be selected once a field is in the Criteria or Expression Grid. Once the Advanced check box is selected, the Advanced section, the Function button, and the Variable button are available for use.

The Expression Grid is where you build an expression using the drop-down options available. You can add more fields to the Expression Grid to make a more complex expression by using OR and AND.

Reference: Expression Builder Dialog Box

The Expression Builder dialog box has the following sections:

Data section

Displays a list of all of the fields in the data source. Double-click or drag a field to add it to the Expression Grid.

If the selected field has a title attribute defined in the Master File, the title will be used in the prompt text for the variable. If the selected field does not have a title attribute, the name of the field will be used in the prompt text for the variable.

Expression Grid

Create an expression by using the drop-down menus in correlation with a field.

You can delete expressions from the Expression Grid using the Delete key or right-click Delete option when either the And/Or or Column to filter columns are selected. If you use the Delete key or right-click Delete option on any other column, it will only delete that column option.

You can only delete entire expressions, using the Expression Grid, when there are multiple expressions present. If you want to delete a single expression, you must do it from the Criteria section.

And/Or

Displays the keyword used in the expression listed in the Expression list box. You must select more than one field for the expression to activate this option.

Parentheses

Allows you to add one, two, or three parentheses before and after an expression.

Column to filter

The field you clicked or dragged from the Data section. This field can be changed after being added by clicking the drop-down list and selecting a different field.

Logical Relation

Displays a list of possible relations between the selected data source field and the value, parameter, or other field that WebFOCUS will compare it to. Select a relation to activate the Compare Type column.

The following relations are available from the drop-down list:

- ☐ equals
- ☐ does not equal

- ☐ is greater than
- ☐ is greater than or equal to
- ☐ is less than
- ☐ is less than or equal to
- ☐ is
- ☐ is not
- ☐ contains
- ☐ does not contain
- ☐ matches the pattern
- ☐ does not match the pattern
- ☐ is like
- ☐ is not like
- ☐ is missing
- ☐ is not missing
- ☐ includes
- ☐ excludes
- ☐ is from
- ☐ is not from
- ☐ is in literal list
- ☐ is not in literal list
- ☐ is in external file of literals
- ☐ is not in external file of literals
- ☐ none

Note: The *is* and *is not* relations are only available for an IF statement. The *matches the pattern*, *does not match the pattern*, *is like*, *is not like*, *is in literal list*, *is not in literal list*, *is in external file of literals*, and *is not in external file of literals* relations are only available for a WHERE statement.

Compare Type

Indicates the nature of the comparison you wish to make to the field selected in the field section.

The following is a list of the available Compare Types and a brief description of what each is:

- ☐ Value is a set value the user creates, using the Multiple or Single Value Builder, in the Compare Value section.
- ☐ Field is a selected field the user specifies, using the Multiple or Single Value Builder, from the Compare Value section.
- ☐ Parameter is a parameter created by the user, using the Variable Editor, in the Compare Value section.
- ☐ Parameter (Optional) is a parameter option that allows a user to create a parameter that does not require a value at run time.
- ☐ Parameter (Dynamic) is a parameter option that allows a user to multiselect values using a button. This option automatically generates the required syntax so that the Variable Editor does not need to be invoked.
- ☐ Parameter (Static) is a parameter option that presents a value list to select from. This option automatically generates the required syntax so that the Variable Editor does not need to be invoked.
- ☐ Parameter (Simple) is a parameter option that prompts the user to enter a value. This option automatically generates the required syntax so that the Variable Editor does not need to be invoked.
- ☐ Function is a function created by the user, from the Compare Value section, using the Function Arguments dialog box.
- ☐ Import Values is a list of values, created by the user, using the Multiple or Single Value Builder, in the Compare Value section.

Note: The external file should be a text file with new line delimiters.

- ☐ Other allows you to enter your own expression.

Note: After choosing Other and double-clicking on Compare Value to enter a value, you will be prompted with the following warning message. You can choose to not show this message again by selecting the option at the bottom of the warning window.

If using a literal value, it must be enclosed in single quotes.
Please use "Compare Type" "Value" instead for quotes to be added automatically.

Compare Value

Specifies the literal value, parameter, or other field to which the selected field is compared.

The choices available here are dependent on the selection you make in the Compare Type column.

Criteria

The Criteria section shows the different expressions you created. Selecting an expression in the Criteria section will show you details of the expression in the Expression Grid and/or the Advanced section.

Advanced check box

This option can only be checked if there is an expression in the Criteria or Expression Grid section. This option will enable you to use the Advanced section, the Function button, and the Variable button.

Advanced section

In this section, you can type an expression using syntax, instead of using the Expression Grid.

Function

Only available when Advanced is checked. Opens the Function Arguments dialog box to assist in the creation of an expression that is being made with the Advanced section.

Variable

Only available when Advanced is checked. Opens the Variable Editor dialog box to assist in the creation of an expression that is being made with the Advanced section.

Delete

Deletes an expression.

Up

Moves an expression up one.

Down

Moves an expression down one.

Procedure: How to Display Records Based on Specified Values

In the Expression Builder dialog box:

1. Select a field name from the Data section.
The field is added to the Expression Grid.
2. Select a relation from the Logical Relation column.
3. In the Compare Type column, select *Value*.
4. Double-click the *Compare Value* column. The Multiple Value Builder dialog box opens.
5. Click the *Select a field* button and select a value from the list.
6. Double-click the value to add the value to the list.

Note: Repeat this process to add other values to the list.

7. Click *OK*.

The values are shown in the Compare Value column.

Procedure: How to Display Records Based on a Variable Value

In the Expression Builder dialog box:

1. Select a field name from the Data section.
The field is added to the Expression Grid.
2. Select a relation from the Logical Relation column.
3. In the Compare Type column, select *Parameter (Dynamic)*.

This creates a Single Select parameter. If you want to create a Multiselect parameter, double-click the Compare Value column to open the Variable Editor and change the Variable Type to *Multiselect*.

Procedure: How to Display Records Based on Field Values

In the Expression Builder dialog box:

1. Select a field name from the Data section.

2. Select a relation from the Logical Relation column.
3. In the Compare Type column, select *Field*.
4. Double-click the Compare Value column to open the Single Value Builder dialog box.
5. Double-click a field from the Data Source section to move it to the Value List.
6. Click *OK* to close the Single Value Builder dialog box.

The field is added to the Compare Value column.

Procedure: How to Display Records Based on Imported Values From an External File

In the Expression Builder dialog box:

1. Select a field name from the field list.
2. Select a relation from the Logical Relation column.
3. Select *Import Values* from the Compare Type list options.
4. Double-click the Compare Value column.

The Multiple Value Builder opens.

Note: A Single or Multiple Value Builder dialog box opens, based on your Logical Relation selection. In the Multiple Value Builder dialog box, you may select more than one value. In the Single Value Builder dialog box, only one value may be selected.

5. Click the *Select File* button to import values from an external file.
6. Select a text file from your local machine and click *Open*.

Note: The external file should be a text file with new line delimiters.

The imported values are loaded into the Data Source area of the Multiple Value Builder dialog box.

7. Double-click an imported value to add it to the Values List.
8. Click *OK* to close the Multiple Value Builder dialog box and return to the Expression Builder.

The imported values are added to the Compare Value area.

Procedure: How to Select Multiple Values and Fields

In the Expression Builder dialog box, you can select multiple values or fields to be used for record selection criteria by selecting options in the And/Or column. The And/Or column is only available if you have more than one Column to filter.

1. Select more than one field name from the Fields window and drag them to the Expression Grid.

Note: For every Column to filter after the topmost one, And is already selected for you.

2. Click the down arrow in the And/Or column. Select one of the following:

And

To start a new expression that will be combined with the previous expression by the keyword AND.

Or

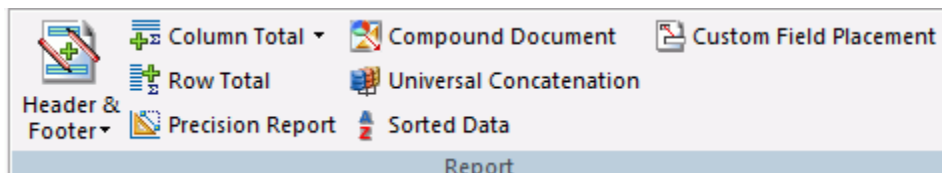
To start a new expression that will be combined with the previous expression by the keyword OR.

3. Select remaining criteria from the other columns in the Expression Builder to complete the expression.
4. Click OK.

Note: When the keyword *And* is used, WebFOCUS only selects data that meet both conditions. When the keyword *Or* is used, WebFOCUS selects data that meet either condition.

Customizing a Report Using the Report Group

You use the components of the Report group to customize your reports. For example, you can add a header and footer to your report and include row and column totals. You can also sort the data on your report. The Report group is shown in the following image.



The commands are:

Header & Footer

Adds a header, footer, or both to your report. You can define a Report Header, Page Header, Page Footer, or Report Footer.

Column Total

Displays column totals in the report. You can select No Totals, Column Totals, or Summarize.

Row Total

Displays row totals in the report.

Precision Report

Converts your report to a precision report.

Compound Document

Converts your report to a Compound document. The original report remains unchanged while a copy of that report is placed on the Document canvas.

Universal Concatenation

Retrieves data from unlike data sources in a single request. Opens the Universal Concatenation dialog box, where you can add the additional data sources to concatenate. For more information, see [How to Concatenate Data Sources](#) on page 320.

Sorted Data

Assumes that the data is already sorted in the database. If the data you are accessing is already in the correct sort order, you can prevent WebFOCUS from resorting it. This feature provides a fast method of retrieving data if it is already stored in the order required for display, and no further sorting is required.

Custom Field Placement

Allows sort fields to be moved from their default location.

Procedure: How to Concatenate Data Sources

Universal concatenation specifies how to combine data from sources with dissimilar Master Files.

1. Create the main request.

This contains all the formatting for the resulting report and names the first file to be concatenated. It also contains all printing and sorting information. The fields printed and the sort fields must exist as real or DEFINE fields in each file.

2. On the Report tab, in the Report group, click *Universal Concatenation*.

The Universal Concatenation dialog box opens.

3. Click the *Add Source* button to add additional data sources.

The Open File dialog box appears.

4. Select a Master File and click *OK*.

If there are temporary HOLD files associated with the procedure, HOLD files are available from the Open dialog box.

The selected data source is added, showing the Report Field Resolutions and Filters. Additionally, the Define Tool is activated.

Note: If the field names for the selected data source are not the same names and formats as the fields being printed and sorted in the main request, the Universal Concatenation dialog box indicates that you need to define these fields with status icons.

5. Create or modify a field for the universal concatenation with the Define Tool.

- ☐ Click the *Define* button from the Universal Concatenation toolbar.

or

- ☐ Double-click the field name from the Additional Data Sources list.

The Define Tool opens.

Note: The Define Tool opens automatically if the *Create all needed fields for a data source when launching the Define tool* option is selected. This creates the missing defines for the data source. A message appears before the Define Tool opens, stating which DEFINES will be created and require expressions, followed by a list of the created DEFINE fields. This option is off by default.

- ☐ Create the DEFINE expression using the selected universally concatenated Master File, generating the required DEFINES for the data source to have the same field names and formats as the fields used in the main request.

- ☐ Click *OK* to close the Define Tool.

The DEFINE expression is written in the procedure ahead of the TABLE request.

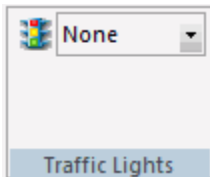
6. Create selection criteria for the universal concatenation with a filter.

You may create a filter through a WHERE clause.

- ☐ Select the *Where/If* button to open the Expression Builder.
 - ☐ To modify or view the filter, double-click the filter expression from the Additional Data Source list to open the Expression Builder.
7. Click *OK* to close the Universal Concatenation dialog box and add the MORE command to the procedure.

Setting Conditional Styling Using the Traffic Lights Group

You use the Traffic Lights group to set styling conditions. The Traffic Lights group is shown in the following image.



Traffic Lights

Sets the current condition for styling and hyperlinks. Options include:

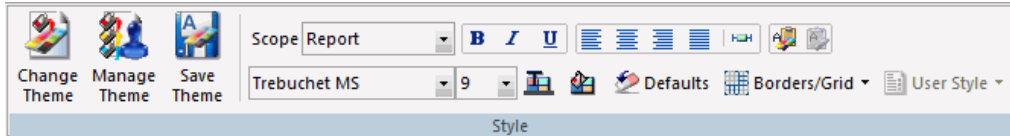
- ☐ **None.** Displays a preview of the report with no visible conditional styling. This is the default.
- ☐ **Forecast.** Lets you apply conditional styling to the predictive analytics shown in a forecast column. For more information, see [Overview of Forecasting](#) on page 354.
- ☐ **Add/Edit Conditions.** Opens the Condition List dialog box. From this dialog box, you can define new conditions, and then apply styling to them.

The styling you add to a condition appears as a preview in the Report canvas when you select the condition in the Traffic Lights drop-down list box.

For a sample procedure, see [How to Use the Traffic Lighting Feature to Set Conditional Styling](#) on page 306.

Applying a Theme and Style to a Report Using the Style Group

You use the tools in the Style group to apply stylistic changes to a report, including data, title, and all other components of the report. The Style group is shown in the following image.



The commands are:

Change Theme

Changes the theme of the report from a list of available style sheets.

Manage Theme

References or embeds an external StyleSheet or applies no styling to your report. The WebFOCUS StyleSheet is applied by default. When you click this button, the StyleSheet Selection dialog box opens.

Save Theme

Saves your current theme options.

Scope

Indicates the scope to which your changes will apply. For example, if you choose Report, your style changes will be applied to the whole report. If you choose Footing, your changes will be applied to the footer only. You can use the Scope function to apply styling to different areas of your report. The Scope options available from the Report tab are:

- ☐ Report
- ☐ Title
- ☐ Data
- ☐ Report Header
- ☐ Report Footer
- ☐ Page Header
- ☐ Page Footer
- ☐ Subhead
- ☐ Subfoot

- ☐ Subtotal
- ☐ Subtotal Tag
- ☐ Across Title
- ☐ Across Data
- ☐ Column Totals
- ☐ Column Totals Tag
- ☐ Report Totals (Report)
- ☐ Report Totals (Title)
- ☐ Report Totals (Data)
- ☐ Recap
- ☐ Cell
- ☐ Page Color
- ☐ (Selected Item)

Note: The (Selected Item) scope is only available when you select a text or field item. The type of item selected will come before *(Selected Item)*. For example, if you have text selected in the Page Footer, the Scope would display *Page Footer (Selected Item)*.

Bold

Applies bold font formatting to the highlighted text or text within a selected object.

Italic

Applies italic font formatting to the highlighted text or text within a selected object.

Underline

Underlines the highlighted text or text within a selected object.

Left

Aligns the highlighted text or text within a selected object to the left.

Center

Aligns the highlighted text or text within a selected object to the center.

Right

Aligns the highlighted text or text within a selected object to the right.

Default

Aligns the highlighted text or text within a selected object to the default alignment option. This aligns numbers to the right and text to the left.

Report Width

Sets report width options.

Copy Style

Copies the current style settings, enabling the Paste Style button.

Paste Style

Pastes the copied style settings.

Font Name

Changes the font of the highlighted text or text within a selected object. Fonts are listed in alphabetical order.

Font Size

Changes the font size of the highlighted text or text within a selected object. Font sizes range from 8 to 72 (whole numbers only).

Color

Changes the font color of the highlighted text or text within a selected object. Applies the color change to the selected Scope. Opens the Color dialog box, where you can select the font color.

Background Color

Changes the background color of the highlighted text or text within a selected object. Applies the color change to the selected Scope. Opens the Color dialog box, where you can select the background color.

Defaults

Resets the style settings of the highlighted text or text within a selected object to the default (original) style.

Borders/Grid

Turns on or disables borders and grid lines. You can apply borders and gridlines to HTML, Excel, and PDF reports. For all other report types, this option is disabled.

User Style

Enables you to set User Format Style Blocks, if available.

Referencing or Embedding a Style Sheet Using the StyleSheet Selection Dialog Box

The StyleSheet Selection dialog box enables you to reference or embed an external style sheet, use the default WebFOCUS StyleSheet, or apply no styling to your report. You may also save and include multiple style sheets. The StyleSheet Selection dialog box is accessible from the Style group on the Report canvas ribbon.

The StyleSheet Selection dialog box provides the following capabilities:

- ☐ Include a StyleSheet.
- ☐ Apply an external cascading style sheet (CSS).
- ☐ Embed a StyleSheet.
- ☐ Apply the default WebFOCUS StyleSheet.
- ☐ Save the modified style sheet as a new style sheet file (.sty).

To open the StyleSheet Selection dialog box, on the Report tab, in the Style Group, click *Manage Theme*.

Note: The StyleSheet Selection dialog box opens to the Include StyleSheet File section, since every procedure has existing embedded styling, by default. You may click *Change Options* and choose to embed or reference an external StyleSheet, use the WebFOCUS default StyleSheet, or turn off all report styling, as described in the following procedures.

Procedure: How to Include a StyleSheet in a Report

Since every procedure has existing styling, the Include StyleSheet File section opens, by default.

When a StyleSheet is included, part of the styling is embedded in the report. You may include StyleSheets up to an INCLUDE depth of three in your report, with the last selected StyleSheet having precedence.

1. On the Report tab, in the Style group, click *Manage Theme*.

The StyleSheet Selection dialog box opens.

2. Click the *Add new item* button.

The Open File dialog box opens.

3. Select a StyleSheet file and click *OK*.
4. Optionally, you may select to include additional StyleSheets, up to an *INCLUDE* depth of three in your report.

Note: The last selected StyleSheet has precedence in the report. You may use the arrows to reorder the arrangement of StyleSheets.

The following syntax will be added to the procedure for the included StyleSheets.

```
ON TABLE SET STYLE *
    INCLUDE = citrus,
$
    INCLUDE = teal,
$
    INCLUDE = olive,
$
.
.
.
```

5. Click *Finish* to close the StyleSheet Selection dialog box.
6. Optionally, you may apply styling options from the Report canvas and save the StyleSheet code using the *Save Theme* command, in the Style group, on the Report tab.

Procedure: How to Apply an External Cascading Style Sheet (CSS)

In addition to applying StyleSheets to your report, you may apply an external cascading style sheet to your report. An external cascading style sheet (CSS) is an extension to HTML that enables you to specify formatting for an HTML document. To link the CSS to the report, use the External Cascading Style Sheet URL field in the StyleSheet Selection dialog box.

Note: An external cascading style sheet is only applicable when using the HTML report output format.

1. On the Report tab, in the Style group, click *Manage Theme*.
The Stylesheet Selection dialog box opens.
2. Type a name of the customized StyleSheet (.css) in the *External Cascading StyleSheet URL* input field.

Note: The external CSS (cascading style sheet) file should be saved in an alias on the web server.

3. Optionally, you may include StyleSheets to be added to the report.

Note: A CSS file is separate from a StyleSheet file and can exist on its own.

4. Click *Finish* to close the StyleSheet Selection dialog box.

Procedure: How to Embed a StyleSheet in a Report

Embedding a StyleSheet stores your style information within the report, from which you can read an existing file as a starting point, start with an empty style, or leave the current StyleSheet contents without any modifications.

1. On the Report tab, in the Style group, click *Manage Theme*.

The StyleSheet Selection dialog box opens.

2. Click *Change Options* to change the StyleSheet Selection dialog box options. The StyleSheet Selection dialog box displays.
3. Accept the default, *Normal Embedded Styling*, and click *Next*.
4. To read an existing file as a starting point:

- a. Select *Initialize with the contents of a pre-existing file*.

Note: Preserve referenced StyleSheets so any “INCLUDE=name” will not be deleted is selected, by default. When a StyleSheet is included, a reference of the StyleSheet is added to the report syntax as INCLUDE=name. This reference is added to the existing style information already in the TABLE request.

- b. Click *Next*.

The StyleSheet File Selection dialog box appears.

- c. Select a Predefined Template file to use as your starting point and click *OK*.

The selected StyleSheet file is shown as the origin embedded StyleSheet file. Optionally, you may include additional StyleSheets or add an External cascading style sheet (CSS).

- d. Click *Finish* to close the StyleSheet Selection dialog box.

The selected StyleSheet code is imported into the procedure and overwrites any existing styling in the report.

5. To start with an empty style:

- a. Click *Change Options* to change the StyleSheet Selection dialog box options.

- b. Keep *Normal Embedded Styling* selected and click *Next*.
- c. Select *Start fresh with an empty StyleSheet*.

Note: Preserve referenced StyleSheets so any "INCLUDE=name" will not be deleted is selected, by default. When a StyleSheet is included, a reference of the StyleSheet is added to the report syntax as INCLUDE=name. This reference is added to the existing style information already in the TABLE request.

- d. Click *Next*.

The Include StyleSheet File section opens indicating that the origin of the embedded StyleSheet file is unknown.

Tip: You may select StyleSheet files to embed to your currently empty style.

- e. Click *Finish* to close the StyleSheet Selection dialog box.
- f. Click *OK* to close the StyleSheet Selection dialog box.

Starting with an empty style clears any styling from the report and initializes a procedure with the WebFOCUS default style code (basic styling that is used when styling is not specified).

- 6. To leave Report canvas generated styling untouched:

- a. Click *Change Options* to change the StyleSheet Selection dialog box options.
- b. Keep *Normal Embedded Styling* selected and click *Next*.
- c. Select *Leave current StyleSheet contents without modification*.

Note: Preserve referenced StyleSheets so any "INCLUDE=name" will not be deleted is selected, by default. When a StyleSheet is included, a reference of the StyleSheet is added to the report syntax as INCLUDE=name. This reference is added to the existing style information already in the TABLE request.

- d. Click *Next*.

The Include StyleSheet File section opens indicating that the origin of the embedded StyleSheet file is unknown.

Tip: You may include StyleSheets to be added to the report.

- e. Click *Finish* to close the StyleSheet Selection dialog box.

7. Optionally, you may apply styling options from the Report canvas and save the StyleSheet code.

Procedure: How to Apply the Default WebFOCUS StyleSheet

The WebFOCUS Default Styling section applies the default StyleSheet to your report, with no styling visible in the procedure.

Note: The default WebFOCUS StyleSheet disables any styling options in the report. No further styling options of any kind can be applied to the report.

1. On the Report tab, in the Style group, click *Manage Theme*.
The StyleSheet Selection dialog box opens.
2. Click *Change Options* to change the StyleSheet Selection dialog box options.
3. Select *WebFOCUS Default Styling* and click *Finish*.

Tip: To remove the default WebFOCUS StyleSheet and enable styling, click the *Style File Selection* button to open the StyleSheet Selection dialog box and select the *Normal Embedded Styling* option.

Procedure: How to Reset the Default Report Canvas Styling

To reset the default the Report canvas styling in the StyleSheet Selection dialog box:

1. On the Report tab, in the Style group, select *Manage Theme*.
The StyleSheet Selection dialog box opens.
2. Highlight the added StyleSheet files (.sty) listed in the Include StyleSheet File section and click *Delete selected items (Del)*.

Procedure: How to Save a StyleSheet

After including StyleSheets and applying styling options from the Report canvas, you may save the StyleSheet as a new StyleSheet file (.sty).

1. On the Report tab, in the Style group, click *Save Theme*.
The Save As dialog box opens.
2. Type a name for the StyleSheet in the *File name* input field and click *OK*.
The .sty file is saved in the working directory. You may browse to select a different location.

Tip: The saved StyleSheet can be included in other reports from the StyleSheet File Selection dialog box.

Reference: Usage Notes for the StyleSheet Selection Dialog Box

The following apply when using the StyleSheet Selection dialog box in the Report canvas:

- ❑ Applying StyleSheets through the StyleSheet Selection dialog box follows the same rules of WebFOCUS StyleSheet inheritance. For details, see *WebFOCUS StyleSheet Attribute Inheritance* in the *Creating Reports With WebFOCUS Language* manual.
- ❑ When including or referencing a StyleSheet that is not in the current application, the StyleSheet gets copied to the working directory.

If the StyleSheet already exists in the current application, it does not get overwritten.

To refresh an existing StyleSheet, you must copy the new StyleSheet to the working directory or remove the StyleSheet from the procedure, delete it from the working directory, and then add it back to the procedure.

- ❑ The default location for StyleSheets that are Included or referenced in App Studio is (...\\AppStudio\\n\\ibi_html\\javaassist\\intl\\locale\\combine_templates), which contains a set of sample StyleSheets. You can also search other WebFOCUS locations for available StyleSheets.
- ❑ When a StyleSheet is used in the procedure and the StyleSheet Selection dialog box is opened, it opens in the Include StyleSheet File section, enabling you to change the included StyleSheet. You may also change the StyleSheet options. This occurs even when the *Defaults* option (located in the Style group on the Report canvas ribbon in App Studio) is clicked.

Note: If you go back and select to embed or reference a StyleSheet, or use the WebFOCUS default option, the StyleSheet that was in the report will get overwritten.

- ❑ If the report does not have any styling, the StyleSheet Selection dialog box opens to the Change Options section. The report code contains the command:

```
ON TABLE SET STYLE OFF
```

Assigning a Color Value Using the Color Dialog Box

The Color dialog box lets you choose a color by selecting it from the color palette or entering a hexadecimal value.

Procedure: How to Access the Color Dialog Box

1. On the Report tab, in the Style group, click *Color* or *Background Color*.

The Color dialog box displays.

2. Click *Default* to restore the formatting back to its original state.
3. Click *Custom* to access custom coloring.
4. Click *OK* to close the Color dialog box.

Adding Borders to a Report Using the Borders Dialog Box

You use the Borders dialog box to add borders to your report.

Procedure: How to Add Borders to an HTML, Excel, or PDF Report

You can add borders to an entire report, a column, or another object area, such as a heading or footing.

Note: You must remove grids from the report, column, or object area before you can apply borders.

You can set borders to a report globally, so that they will apply to all objects you subsequently add to the report.

Note: Ensure that HTML, Excel, or PDF is selected as the report output format on the Format tab.

To set global borders:

1. On the Report tab, in the Style group, click *Borders/Grid* and then click *Borders*.

The Borders dialog box opens.

Note: By default, the *Make all borders the same* option is selected.

2. To specify border settings for the top, bottom, left, and right borders, click the *Make all borders the same* check box to disable that option. Make your border selections:
 - ☐ Select the following options from the Width drop-down list:
 - OFF* to turn borders off. (This is the default.)
 - LIGHT* to apply thin border lines.

MEDIUM to apply medium border lines.

HEAVY to apply thick border lines.

- ☐ From the Style drop-down list, select a line style.
- ☐ From the Color drop-down list, select a color.

After you select your border width, style, and color selections, you can see them in the Border Preview window in the Borders dialog box.

Note: You can restore the original default borders by clicking the *Default* button.

3. Click *OK*.

To apply a border to a column:

1. Select the column to which you want to apply a border.
2. On the Appearance tab, in the Style group, select an option from the Scope drop-down command. The options are:
 - ☐ *Data and Title* applies grids to the column title and data.
 - ☐ *Data Only* applies grids to the column data.
 - ☐ *Title Only* applies grids to the column title.
3. On the Appearance tab, in the Style group, click *Borders*.
The Borders dialog box opens.
4. To specify border settings for the top, bottom, left, and right borders, select the *Make all borders the same* check box to turn off that option.
5. Make your border selections:
 - ☐ Click the down arrow in the Width drop-down list box and select:
 - OFF* to turn borders off. (This is the default.)
 - LIGHT* to apply thin border lines.
 - MEDIUM* to apply medium border lines.
 - HEAVY* to apply thick border lines.
 - ☐ From the Style drop-down list, select a line style.
 - ☐ From the Color drop-down list, select a color.

After you select your border width, style, and color selections, you can see them in the Border Preview window in the Borders dialog box.

Note: If the OFF option is selected in the Width drop-down list, no borders will be shown.

6. Click *OK*.

To apply a border to another object area:

1. On the Report tab, in the Style group, select an option from the Scope drop-down command. The options are:

- ☐ Report
- ☐ Title
- ☐ Data
- ☐ Report Header
- ☐ Report Footer
- ☐ Page Header
- ☐ Page Footer
- ☐ Subhead
- ☐ Subfoot
- ☐ Subtotal
- ☐ Subtotal Tag
- ☐ Across Title
- ☐ Across Data
- ☐ Column Totals
- ☐ Column Totals Tag
- ☐ Report Totals (Report)
- ☐ Report Totals (Title)
- ☐ Report Totals (Data)
- ☐ Recap
- ☐ Cell

- ☐ Page Color
 - ☐ (Selected Item)
2. On the Report tab, in the Style group, click *Borders/Grid* and then click *Borders*.
The Borders dialog box opens.
 3. To specify border settings for the top, bottom, left, and right borders, select the *Make all borders the same* check box to turn off that option.
 4. Make your border selections:
 - ☐ Select the following options from the Width drop-down list:
 - OFF* to turn borders off. (This is the default.)
 - LIGHT* to apply thin border lines.
 - MEDIUM* to apply medium border lines.
 - HEAVY* to apply thick border lines.
 - ☐ From the Style drop-down list, select a line style.
 - ☐ From the Color drop-down list, select a color.

After you select your border width, style, and color selections, you can see them in the Border Preview window in the Borders dialog box.

Note: If the OFF option is selected in the Width drop-down list, no borders will be shown.

5. Click *OK*.

Specifying a Width Limit for a Value Using the Width Options Dialog Box

The Width Options dialog box allows you to set how values will be handled if they extend the report cell. You can also enter a value to specify a limit for how large or small a value can be before these options take effect.

Procedure: How to Set Width Options for a Report

1. On the Report tab, in the Style group, click *Report Width*.
The Width Options dialog box displays.
2. From the *<not set>* drop-down dialog box, select one of the following options:
 - ☐ Minimum

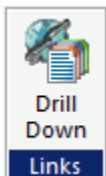
- ☐ Maximum
 - ☐ Truncate
 - ☐ Wrap
 - ☐ Wrap Off
3. Indicate a value (in inches) by which to limit the width of the report.

Note: This only applies to Truncate and Wrap.

4. Click *OK*.

Creating a Drill-Down Procedure Using the Links Group

You use the Links Group to create drill-down procedures. The Links group is shown in the following image.



Drill Down

Enables you to create a drill-down procedure.

Note: The Links group also appears on the Appearance tab.

Procedure: How to Create a Drill-Down Procedure

1. On the Appearance tab or Report tab, in the *Links* group, select *Hyperlink*.
The Drill Down dialog box displays.
2. Click the *Add new item* button on the Drill Down dialog box toolbar.
The Drill Down fields are enabled.
3. In the Drill Down dialog box:
 - a. The Drill Menu Items field is automatically populated with a default drill-down name. You may rename it as needed, or delete the name if you are using only one drill down.
 - b. Select one of the following Drill Down Types from the drop-down menu:

- ☐ Execute Procedure
- ☐ Execute Guided Procedure
- ☐ URL
- ☐ URL from field
- ☐ JavaScript
- ☐ Refresh BI Portal

Note: The *Refresh BI Portal* drill-down type will be displayed only when you are working with a report that was created in the Content development area.

- c. Double-click in the Source field.
 - ☐ If you selected the *Execute Procedure* Drill Down Type, the Open File dialog box opens. Select the procedure to drill to and click *OK*.
 - ☐ If you selected the *Execute Guided Procedure* Drill Down Type, the Guided DrillDown dialog box opens. For more information, see [How to Create a Guided Drill Down Procedure](#) on page 338.
 - ☐ If you selected the *URL* Drill Down Type, type a fully qualified URL to drill to.
 - ☐ If you selected the *URL from field* Drill Down Type, select a source field from the drop-down menu which contains the URL to drill to.
 - ☐ If you selected the *JavaScript* Drill Down Type, enter the function to drill to. In the Parameters field (Step 4 below), type the arguments for the function.
 - ☐ If you selected the *Refresh BI Portal* Drill Down Type, select *Current page only* or *All pages in portal* to refresh when the drill down is triggered.
- d. Select a Target Frame from the drop-down menu:
 - ☐ *_blank* opens the target procedure in a new window.
 - ☐ *_self* opens the target procedure in the same window as the source. This is the default. In addition, it is the only option available if you selected the *Refresh BI Portal* drill down type.
 - ☐ *_parent* opens the target procedure in the same frame as the anchor.
 - ☐ *_top* opens the target procedure in the current window.

- e. Double-click in the Parameters field.

The Parameters dialog box opens.

- 4. Click the *Add new item* button on the Parameters dialog box toolbar.

The Parameter fields are enabled.

- 5. In the Parameters dialog box:

- a. The Parameter Name field may appear, depending on the Drill Down Type you selected. Select a name from the drop-down menu or, if no drop-down menu appears, type a parameter name.

- b. Select a parameter type from the drop-down list box:

- ☐ *Field* allows you to select a specific field from the Parameter Value drop-down menu.
- ☐ *Constant Value* allows you to specify a constant value for the parameter in the Parameter Value field.
- ☐ *Variable* allows you to specify a variable for the parameter in the Parameter Value field.

- 6. Click *OK*.

The Parameters dialog box closes and you return to the Drill Down dialog box.

- 7. Click *OK*.

The Drill Down dialog box closes.

Procedure: How to Create a Guided Drill Down Procedure

- 1. On the Appearance tab or Report tab, in the Links group, select *Hyperlink*.

The Drill Down dialog box opens.

- 2. Click the *Add new item* button on the Drill Down dialog box toolbar.

The Drill Down fields are enabled. The Drill Menu Items field is automatically populated with a default drill-down name. You may rename it as needed, or delete the name if you are using only one drill down.

- 3. In the Drill Down type list, click *Execute Guided Procedure*.

- 4. Double-click in the Source field.

The Guided DrillDown dialog box opens.

5. Click *Browse*.

The Open File dialog box opens.

6. Select the drill-down procedures that you want to use.

To select multiple procedures, hold down the Control key and click the procedures.

7. Click *OK*.

You are returned to the Guided DrillDown dialog box, with the selected procedures displayed in the procedures list box.

8. Optionally, use the procedures list box toolbar to change the order of the procedures, undo or redo changes, or delete a procedure from the list.

9. To add parameters for a procedure, select it in the procedures list box, then click *Add* in the Parameters list box.

The Drill Down Parameter dialog box opens.

10. In the Drill Down Parameter dialog box, do the following:

- a.** Type a parameter name in the Parameter name field.
- b.** To specify a field as a parameter value, select *Field* and use the drop-down list to select a field from the highlighted procedure.
- c.** To specify a constant value as a parameter value, select *Constant value* and type the value in the available field.
- d.** To change the wording of the prompt that displays when users select a drill down procedure, type the new wording in the Prompt field.

11. Click *OK*.

You are returned to the Guided DrillDown dialog box.

12. Click *OK*.

You are returned to the Drill Down dialog box.

13. In the Drill Down dialog box, select a Target Frame from the drop-down menu. The available options are:

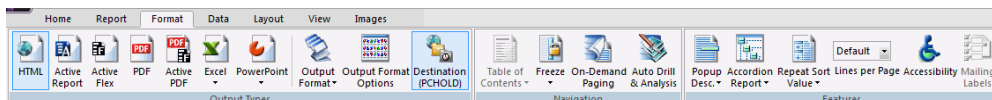
- ☐ *_blank* opens the target procedure in a new window.
- ☐ *_self* opens the target procedure in the same window as the source.
- ☐ *_parent* opens the target procedure in the same frame as the anchor.
- ☐ *_top* opens the target procedure in the current window.

14. Click *OK*.

The Drill Down dialog box closes.

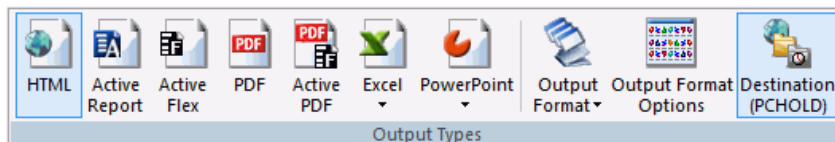
Managing Output Formats Using the Format Tab

You use the Format tab to change the output type of the report, control the navigational settings of a report, and access the special features of a report. Accordingly, this tab contains the Output Types, Navigation, and Features groups. The Format tab is located at the top of the App Studio interface and is available only when you are creating a report. The Format tab is shown in the following image.



Selecting a Type of Report Using the Output Types Group

The Output Types group enables you to choose the type of report (for example, PDF, Excel, or active report) that you would like to produce. You can also set the output format and the destination of the report using the elements in this group. The Output types group is shown in the following image.



The report type options are:

HTML

Changes the report output type to HTML. This is the default value.

active report

Changes the report output type to HTML active report (AHTML).

active flex

Changes the report output type to active Flex, which creates an HTML report for Adobe Flash Player.

PDF

Changes the report output type to PDF.

active PDF

Changes the report output type to active PDF, which creates a PDF report for Adobe Flash Player.

Excel

Changes the report output type to Excel. You can select the following types of Excel Reports: Excel XLSX, Excel XLS, Excel XLSX Formula, Excel XLS Formula, or the Excel XLS PivotTable.

PowerPoint

Changes the report output type to PowerPoint. You can select PowerPoint PPTX or PowerPoint PPT.

Output Format

Changes the output format of a report. The options that are available to you change depending on which output format you select. Formats are grouped into the following categories: Styled report formats, Unstyled formats, and Database formats.

Output Format Options

Opens the Output Format Options dialog box where you can set a report title, turn on cascading style sheets, set how to expand report rows and turn on line suppression.

Destination

Opens the Output Destination dialog box, where you can set the destination of your output to Web Browser, Temporary File, or Save File. If you select Temporary File or Save File, you can set the name and location of that file using the Name text box and directory selection icon. For more information, see [How to Set the Output Destination](#) on page 341.

Procedure: How to Set the Output Destination

1. On the Format tab, in the Output Types group, click *Destination (PCHOLD)*.

The Output Destination dialog box displays.

2. For Destination, select one of the following options:

- ☐ Web Browser
- ☐ Temporary File
- ☐ Save File
- ☐ Default

Note: If you select Temporary File or Save File, the Name field is activated.

3. Enter a file name and click the ellipsis button (...)

The File name and location dialog box displays.

4. Select where you want to save the file.

Note: The file name that you specified on the Output Destination dialog box is carried over to the Filename field in the File name and Location dialog box.

5. Click OK.
6. Click OK on the Output Destination dialog box.

Reference: Output Format Options Dialog Box for an HTML Report

The following options are available for an HTML report:

Report Title

You can type a report title into the text box.

Cascading Style Sheets

You can select whether or not to include cascading style sheets in your report. You can select On or Off. On is selected by default.

Expand By Row

You can select how you would like rows to be expanded. Only show top level is the default.

- ☐ **Only show top level.** Creates a report which initially displays only the highest sort field level. To see rows on lower levels, click the plus sign (+) next to one of the displayed sort field values.
- ☐ **Off.** Does not create a report where you can expand rows.
- ☐ **Expand everything.** Creates a report in which all sort field levels are initially expanded. To roll up a sort field level, click the minus sign (-) next to one of the sort field values on that level.

Note: If you want to set your report rows to expand to a specific number, you must type an integer into the text box rather than selecting one of the options.

Suppress blank lines

You can select whether to suppress blank lines or not.

- ☐ **Off.** The suppression of blank lines will not occur.
- ☐ **Only within report body.** The suppression of blank lines will only occur within the body of the report.

Reference: Output Format Options Dialog Box for a PDF Report

The following options are available for a PDF report:

Repeat sort fields per panel

Enables the display of By fields in the left portion of each panel of a multi-panel report.

Repeat headings/footings per panel

Repeats headings/footings on each panel page when the columns presented on PDF reports cannot be displayed on a single page.

Use settings for Postscript printing

Sends the page settings to a PostScript printer when printing in PS format.

Display grid for object placement evaluation

Displays a grid in the report output, which enables you to evaluate the correct placement of data and objects during your report design.

Align borders in subheading/subfooting with data

Aligns the borders in a subheading or subfooting with the data in the report output.

Reference: Output Format Options for Excel Reports

The following options are available for an Excel report:

Create separate worksheets for each primary sort value

Adds the highest-level sort field and its values as a TOC in the report. This option deactivates all other options on the Format tab.

Report Title

You can type a report title into the text box.

Generate overflow sheets

This indicates where the overflow rows of data break in the Excel worksheet. The default is 65,000 rows of data before an overflow sheet is generated.

Note: When you change formats from XLSX to EXL2K and ROWLIMIT exceeds 65,000, you will receive a message asking you if you want to proceed. If you decide to continue, ROWLIMIT will be set to 65,000. If you decide not to continue, the format will revert to XSLX, with no change to ROWLIMIT.

Rows per sheet

Specifies the number of rows per sheet. This option is set to max and unable to be edited when Generate overflow sheets is turned off.

Define a range name for the data

Assigns a named range to a group of cells in Excel. There is a 256 character limit for named ranges.

Template

You can set which template to use in your Excel report.

Item to populate

Sets the number of items to populate.

Reference: Output Format Options for PowerPoint Reports

The following options are available for a PowerPoint report:

Template

You can set which template to use in your Excel report.

Item to populate

Sets the number of items to populate.

Reference: User Format Selection Dialog Box

You can use the User Format Selection dialog box to choose which formats and options are available, at run time, when you select the User output format from the Styled report formats, from the Output Formats command. You can select which formats a user can choose from, and customize the options specific to each format.

The options are:

Selection

Provides a list of check boxes that indicate whether or not an output format is available to the user. All formats are selected by default. You can click the check box for a format to clear it.

Format

Displays a list of available output formats.

Description

Provides a brief description of the output format which is displayed to the user, at runtime. You can edit the description by double-clicking the description text box.

Options

Indicates which output formats have options you can customize. You can click the double-arrow to open the Output Format Options dialog box, which displays the options available for that format. For example, if you click the double-arrow for the HTML output format, the Output Format Options dialog box opens, displaying the options for the HTML output format.

Enter text for the WFFMT prompt:

You can type what the user sees when prompted to choose an output format, at runtime.

OK

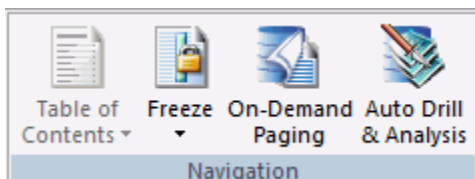
Accepts the changes and closes the dialog box.

Cancel

Discards the changes and closes the dialog box.

Setting Navigational Options for a Report Using the Navigation Group

The navigation group contains the functionality for setting navigational options for your report (for example, adding a Table of Contents or freezing an area of the report). You can also page the report on-demand and control OLAP options from the Navigation group. The Navigation group is shown in the following image.



The commands are:

Table of Contents

Displays every value of the highest-level sort field as a hyperlink, and then toggles between a display of the entire report and a designated section. It also applies a dynamic table of contents to the first By field in an HTML report. You can select Report, Heading, or None.

Note: You create a Table of Contents on a BY field.

For more information, see [How to Add a TOC or Disable the TOC Feature](#) on page 346.

Freeze

Freezes the scrolling area of a report so that Headings or Footings display with the full report in a narrow browser window. You can select Off, On, Top, Bottom, or Custom. For more information, see [How to Freeze the Scrolling Area for HTML Report Output](#) on page 347.

On-Demand Paging

Displays one page of an HTML report, where the server sends the report to your browser one page at a time. You can use controls on your browser to display the next or previous page, all pages, or to navigate to a specific page. You can select On or Off (default).

Auto Drill & Analysis

Controls the appearance of OLAP options, the OLAP Selections pane, and automatic drilldowns. It also opens the Auto Drill & Analysis dialog box. You can select options related to OLAP, the OLAP Selections pane, and automatic drilldowns.

Note: You can use the Auto Drill & Analysis with HTML reports only.

For more information, see [Working With Auto Drill & Analysis Functionality](#) on page 348.

Procedure: How to Add a TOC or Disable the TOC Feature

1. Select a BY column in your report.
2. On the Format tab, in the Navigation group, click *Table of Contents*.
3. Choose one of the following options:
 - ☐ *Report* to embed the TOC in the executed report as an expandable tree control.
 - ☐ *Heading* to add the By columns as the last objects in the page heading. The TOC appears in a drop-down list in the heading when the report is executed.
 - ☐ *None* to turn the TOC feature off.

Tip: Click the *Properties* tab in the Object Inspector to verify that the Table of Contents is turned on.

or

1. Right-click the first By column in the Report canvas and click *Table of Contents*.
2. Select one of the following options: *Report*, *Header*, or *None*.

Procedure: How to Freeze the Scrolling Area for HTML Report Output

You can freeze page headings/footings, report headings/footings, column titles, and totals for your report output. The freeze option is available from the Navigation group of the Format tab.

1. On the Format tab, in the Navigation group, select *Freeze* from the Report menu.
2. Select the freeze type from the drop-down list.

The options are:

- ☐ *Off*. This is the default.
 - ☐ *On*. Freezes the headings/footings, column titles, and totals.
 - ☐ *Top*. Freezes the headings and column titles.
 - ☐ *Bottom*. Freezes the totals and footings.
 - ☐ *Custom*. Enables you to set the scroll height for the freeze type.
3. Save and run your report.

Working With Auto Drill & Analysis Functionality

This section describes the functionality for Auto Drill & Analysis.

Auto Drill and Analysis

OLAP Options

- ☐ **Disable.** OLAP options are disabled and not shown in the OLAP report. By default, the Enable OLAP option is set to Disabled.
- ☐ **Off.** Turns off the OLAP Control Panel and the OLAP Selections pane, but allows OLAP functionality from the report itself. You can access options on right-click menus, drag columns within the report, and use up and down arrows to sort columns from high-to-low or vice versa.
- ☐ **On.** Provides access to the OLAP Selections pane from a square button to the left of the column titles. You can open the Control Panel by clicking the OLAP button in the OLAP report.
- ☐ **Top Panel.** Opens the OLAP Selections pane above the report. The Measures, Graph, and Dimension controls, the band containing the OLAP, Run, and Reset buttons appear above the report output. You can open the Control Panel by clicking the OLAP button on the Selection pane.
- ☐ **Bottom Panel.** Opens the OLAP Selections pane below the report. The Measures, Graph, and Dimension controls, the band containing the OLAP, Run, and Reset buttons appear below the report output. You can open the Control Panel by clicking the OLAP button on the Selection pane.
- ☐ **Hidden Panel.** Opens the OLAP report with the OLAP Selections pane hidden. You can perform a variety of analytic tasks from the report itself. Selection Criteria is shown next to the OLAP button.
- ☐ **Show Tabbed.** For OLAP reports that have multiple dimensions, this option groups the dimension elements under a tab labeled with the dimension name.

Auto Drill Options

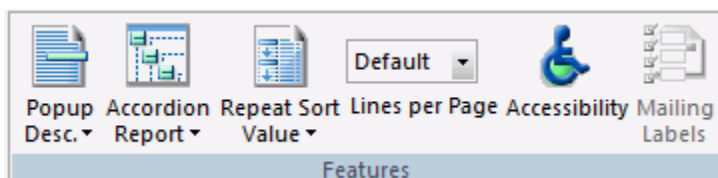
Automatic Drill Down controls access to automatic drill downs in a report:

- ☐ **None.** Disables automatic drill downs. By default, the Automatic Drill Down option is to None.
- ☐ **Dimensions.** Enables automatic drill downs on dimensions in a report.

- ❑ **Dimensions and Measures.** Enables automatic drill downs on dimensions and measures in a report.

Working With the Features Group Commands

Options in the Features group enable you to control the appearance of pop-up descriptions, whether a report is an Accordion Report, whether to repeat a sorted value, whether to use special active report options, and if accessibility options are on. The Features group is shown in the following image.



The commands are:

Popup Description

Enables the display of pop-up field descriptions for columns in your report. You can select On or Off. The default is <not set>. For more information, see [Displaying Pop-up Field Descriptions for Column Titles](#) on page 350.

Accordion Report

Changes a report to an Accordion Report. You can select On or Off. The default is <not set>. Accordion reports provide a way to control the amount of sorted data that appears on an HTML report page. You can produce reports with expandable views of data for each vertical sort field. When an Accordion Report first appears, only data values of the first (highest-level) vertical sort field are shown. All other data is hidden. You can manually expand your view to expose data values of lower-level sort fields. For more information, see [Controlling the Display of Sorted Data With Accordion Reports](#) on page 351.

Repeat Sort Value

Displays all repeated sort values instead of blanks in the output after the first instance of a new sort value, which is the default behavior. You can select On or Off. The default is <not set>.

Lines per Page

Determines how many lines are displayed on each report page. Options are 10, 20, 30, 40, 50, and Show All. The default is 20.

Accessibility

Offers options that help users with disabilities to interact with the report.

Mailing Labels

Opens the Mailing Label Options dialog box, which allows you customize the layout, dimensions, spacing, and print order of your mailing label. This option is only available for PDF and PostScript reports.

For more information, see [Customizing Mailing Labels Using the Mailing Labels Options Dialog Box](#) on page 352.

Displaying Pop-up Field Descriptions for Column Titles

You can have pop-up field descriptions display in an HTML report when the mouse pointer is positioned over column titles. Field description text displays in a pop-up box near the column title using the default font for the report.

Note: Pop-up Field Descriptions are available for HTML Web Document (HTML), HTML Table (HTMTABLE), Default, and User styled report formats.

The pop-up text displayed for a column title is defined by the Description attribute in the Master File for the corresponding field. If a column title has no Description entry in the Master File, then no pop-up box is generated when your mouse is positioned over the title.

The following procedure provides information on displaying pop-up descriptions in an HTML report.

Procedure: How to Display Pop-up Field Descriptions in an HTML Report

1. Open a report in App Studio.
2. On the Format tab, in the Features group, click *Popup Desc*.

The selection menu displays.

3. Select one of the following options:
 - ☐ **On.** Turns Pop-up Field Descriptions on.
 - ☐ **Off.** Turns Pop-up Field Descriptions off.
 - ☐ **<not set>.** Indicates that a value has not been set for Pop-up Field Descriptions. This is the default value.

Controlling the Display of Sorted Data With Accordion Reports

Accordion Reports provide a way to control the amount of sorted data that appears on an HTML report page. You can produce reports with expandable views of data for each vertical sort field. When an Accordion Report first appears, only data values of the first (highest-level) vertical sort field are shown. All other data is hidden. You can manually expand your view to expose data values of lower-level sort fields.

When you create an Accordion Report, a plus sign (+) appears to the left of each data value in the column under the highest-level sort heading. For data associated with lower-level sort fields, a plus sign (+) is placed to the left of each data value, but the data does not appear unless manually expanded. Data values of the lowest-level sort field are not expandable.

To expand your view of data for any expandable sort field, click a plus sign (+) and all data associated with the next lower-level sort field appears. When you expand a data value under the next to lowest sort heading, all of the remaining associated data values in the report appear.

Note: Two vertical (BY) sort fields are required. If your report does not contain two vertical sort fields, then the Accordion Reports option is ignored and a standard HTML report is created.

The use of horizontal (ACROSS) sort fields is supported with Accordion Reports. The horizontal sort headings that appear above vertical sort headings in a standard HTML report are not displayed in an Accordion Report until at least one sorted data value has been manually expanded in each expandable sort column.

PDF and Excel formats are not supported with Accordion Reports.

Reference: Requirements for Accordion Reports

The following requirements must be taken into consideration when creating Accordion Reports:

- ❑ Adding a drill-down link to an Accordion Report requires that the TARGET parameter must be set to a value that specifies a new HTML frame.
- ❑ Once an Accordion Report is created and delivered to the user, there are no subsequent calls to the WebFOCUS Reporting Server required when the user is interacting with the report. However, the collapsible folder controls on the sort fields require JavaScript and images that reside on the WebFOCUS Client. The user must be connected to the WebFOCUS web tier components in order to use this feature. For online connected users of WebFOCUS, no change is required to the report.

Procedure: How to Create an Accordion Report

1. Create a report in the Report canvas using the GGSALES Master File.
2. In the Report canvas main window, add the following fields:
UNITS, ST, DOLLARS, CITY, REGION, CATEGORY
3. Highlight the UNITS and DOLLARS fields and Sum these fields.
4. Highlight the ST, CITY, and CATEGORY fields and make them By fields.
5. On the Format tab, in the Features group, select *Accordion Report*.

Note: Accordion Reports are available for HTML Web Document (HTML), HTML Table (HTMTABLE), Default, and User styled report formats.

6. Select one of the following options:
 - ☐ *On* to turn on Accordion reports.
 - ☐ *Off* to turn off the feature and display the Accordion report.
 - ☐ *<not set>* to indicate no choice.

Note: The default value is *<not set>*.

Customizing Mailing Labels Using the Mailing Labels Options Dialog Box

You can use the Mailing Labels Options dialog box to customize the settings for your mailing label. You can customize the layout, dimensions, spacing, and print order of your label.

Label type

- ☐ **None.** Removes all label settings in the cascading style sheet.
- ☐ **Custom label.** Enables you to specify custom label settings.
- ☐ All other preset label types automatically load the appropriate settings into the cascading style sheet.

Label layout

Sets the number of rows and columns for the labels.

Label dimensions

Determines the height and width of each label.

Label spacing

Determines the amount of horizontal and vertical spacing between each label (in the current units of measure).

Print order

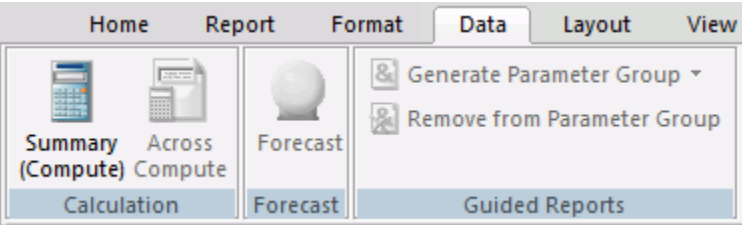
Determines whether the data output flows down a column or across a row.

- ☐ **Down.** Labels are printed top-to-bottom and moves left-to-right until each column is filled.
- ☐ **Across.** Labels are printed left-to-right and then moves down until all rows are complete.

Manipulating Mathematical Data Using the Data Tab

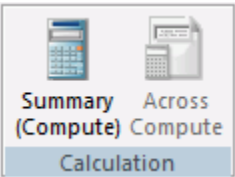
You use the options on the Data tab to manipulate mathematical data in a report.

This tab contains the Calculation, Forecast, and Guided Reports groups. The Data tab is located at the top of the App Studio interface. It is only available when you are creating a report. The Data tab is shown in the following image.



Creating Computes Using the Calculation Group

You can use the options in the Calculation group to include calculated values or computes in your report. The Calculation group is shown in the following image.



The commands are:

Summary (Compute)

Opens the Computed Field Creator dialog box, where you can create and manage calculated values to be used in a report. Specifically, you can create a computed field, type a name for the field, and enter a format. You can also specify how missing values are handled using the Options command, in the dialog box.

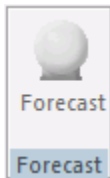
Across Compute

Opens the Across Compute dialog box, where you can create a calculated value to be used in a report.

Note: An Across Compute can only be applied to an Across field. For example, if Sort Across is indicated on the Field tab, you can then apply an Across Compute to that field.

Calculating Data Trends Using the Forecast Group

You can calculate trends in numeric data and predict values beyond the range of those stored in the data source by using the Forecast feature. The Forecast group is shown in the following image.



For more information on Forecasting, see [Overview of Forecasting](#) on page 354.

The command is:

Forecast

Opens the Forecast dialog box, where you can calculate trends in numeric data and predict values beyond the range of values stored in the data source. You can also add a Forecast column to the report. For more information, see [How to Calculate a Simple Moving Average](#) on page 355.

Overview of Forecasting

You can calculate trends in numeric data and predict values beyond the range of those stored in the data source by using the Forecast feature.

The calculations you can make to identify trends and forecast values are:

- ❑ **Simple Moving Average.** Calculates a series of arithmetic means using a specified number of values from a field.
- ❑ **Exponential moving average.** Calculates a weighted average between the previously calculated value of the average and the next data point. There are three methods for using an exponential moving average:
 - ❑ **Single Exponential Smoothing.** Calculates an average that allows you to choose weights to apply to newer and older values.
 - ❑ **Double Exponential Smoothing.** Accounts for the tendency of data to either increase or decrease over time without repeating.
 - ❑ **Triple Exponential Smoothing.** Accounts for the tendency of data to repeat itself in intervals over time.
- ❑ **Linear Regression Analysis.** Derives the coefficients of a straight line that best fits the data points and uses this linear equation to estimate values.

When predicting values in addition to calculating trends, Forecast continues the same calculations beyond the data points by using the generated trend values as new data points. For the linear regression technique, the calculated regression equation is used to derive trend and predicted values.

Forecast performs the calculations based on the data provided, but decisions about their use and reliability are the responsibility of the user. Therefore, Forecast predictions are not always reliable, and many factors determine how accurate a prediction will be.

Conditional Formatting

You can create conditional formatting and data visualizations for forecast data. This makes it easy to distinguish between actual and forecast values in a column. For more information, see [How to Set Conditional Styling for Forecast Data](#) on page 356 or [How to Set Data Visualizations for Forecast Data](#) on page 357.

Procedure: How to Calculate a Simple Moving Average

1. Select the By and Across fields that you want to use for your calculations.
2. On the Data tab, in the Forecast group, click *Forecast*.
The Forecast dialog box opens.
3. If you want to change the name of the output field that displays the Forecasted values, edit the default name that exists in the Field Name field.

4. Select *Moving Average* from the Step 1: Choose a Method drop-down list.
5. Select an input measure field from the Step 2: Choose a Measure drop-down list.
If you select the same field as the By or Across field, this field will not appear in the output even if it is included in a display command.
6. Select the increment number to count each instance of the By or Across field from the Step 3: Choose The Interval field.
7. Select the number of predictions to be calculated for the Forecast field from the Step 4: Choose Number of Predictions field.
8. Select the number of values to average from the Step 5: Choose Number Of Values to Average field.
9. Optionally, change the default field format by clicking the *Change Format* button and selecting a different format from the Format dialog box.
10. Click *OK*.

Procedure: How to Set Conditional Styling for Forecast Data

This procedure shows how you can use the Traffic Lights feature to set styling in your report for forecast data.

1. Open a report that contains one or more columns of forecast data.
2. Click in the data area of a forecast column.
The *Field* and *Appearance* tabs open.
3. On the *Appearance* tab, in the Display group, click *Forecast* from the Traffic Lights drop-down menu.
4. In the *Style* group, click *Data Only* from the Scope drop-down.
5. In the *Style* group, click the Color button.
The Color dialog box opens.
6. Click a color, for example, red.

This means that forecast data will appear in red and actual data will appear in the default black.

Apply other style attributes from the Style group as needed to visually distinguish your forecast data.

Note: In cases where you have multiple forecasts in a report, all forecasts will appear with the same styling that you specify in this procedure.

7. Save and run the report.

Procedure: How to Set Data Visualizations for Forecast Data

This procedure shows how you can use the Traffic Lights and Data Bars features to set data visualizations in your report for forecast data.

1. Open a report that contains one or more columns of forecast data.
2. Click in the data area of a forecast column.

The *Appearance* tab opens.

3. In the *Display* group, click *Forecast* from the Traffic Lights drop-down menu.
4. In the *Display* group, click Data Bars.

The Data Visualization dialog box opens.

5. Click *Visualize*.

The *Conditional Styling* button becomes active.

6. Click *Conditional Styling*.

The Data Visualization Conditional Styling dialog box opens.

7. Click *Forecast*.
8. In the Forecast area, specify the desired visualization and click *OK*.

You are returned to the Data Visualization dialog box.

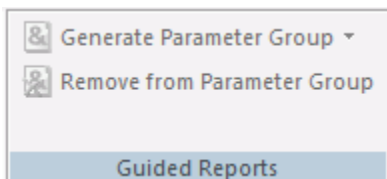
9. Click *OK*.
10. Save and run the report.

Note: The Data Visualization Conditional Styling dialog allows you to remove a Forecast data visualization after it has been saved. However, if you click *Remove* it will also remove any conditional styling that you applied to the forecast. In this case, you would need to reset the conditional styling after the data visualization has been removed.

Creating a Parameterized Report Using the Guided Reports Group

A Guided Report is a highly parameterized report that allows you to select fields and options that participate in a report at run time. Fields and options that have been added to the Guided Report are displayed in controls and are available for selection. Selecting fields from controls and running the report will display the data that correlates to the field values. For more information, see [Overview of Guided Reports](#) on page 358.

You use the options in the Guided Reports group to generate and delete parameter groups. The Guided Reports group is shown in the following image.



The commands are:

Generate Parameter Group

Generates a parameter group from the selected column or columns. It opens a drop-down menu that has the One variable for each selected column and One variable for all selected columns options. One variable for each selected column creates one control for every selected column with all the selected field names as values. One variable for all selected columns creates one control for all selected columns with all the selected field names as values. For more information, see [How to Generate a Parameter Group for One or More Columns](#) on page 359.

Remove from Parameter Group

Removes a column or columns from the parameter group. This command is available only when the selected columns are part of a parameter group. For more information, see [How to Remove One or More Columns from a Parameter Group](#) on page 359.

Overview of Guided Reports

A Guided Report is a highly parameterized report that allows you to select fields and options that participate in a report at run time.

Fields and options that have been added to the Guided Report are displayed in controls and are available for selection. Selecting fields from controls and running the report will display the data that correlates to the field values.

The advantage of using a Guided Report is that you can create one streamlined, highly parameterized report, and from that one report, you can generate thousands of different report outputs at run time. It requires no knowledge of code to customize the final report with the data you want displayed.

Procedure: How to Generate a Parameter Group for One or More Columns

You use this procedure to assign one or more columns to a Parameter Group with either a unique or common variable.

1. Create a report with multiple columns.
2. Select the column or columns to include in the Parameter Group.
3. On the Data tab in the Guided Reports group, click *Generate Parameter Group*.
4. Select one of the following options:
 - ☐ **One variable for each selected column.** Assigns a unique variable to each column.
 - ☐ **One variable for all selected columns.** Generates one unique variable for all selected columns.

Note: To reverse a parameter group assignment, you can press Ctrl-Z, provided that this is immediately following the assignment and no other action has taken place on the canvas.

Procedure: How to Remove One or More Columns from a Parameter Group

You use this procedure to remove one or more columns from a Parameter Group assignment.

1. Open or create a report with multiple columns.
2. Review the Parameter Group assignment.

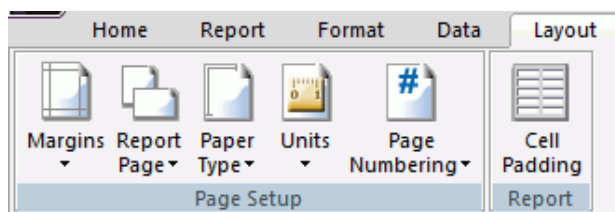
Note: Parameter Group assignments are indicated by an ampersand (&) in the top-left to signify that it is a member of a parameter group. If multiple variables were indicated, each column icon will have a different color scheme. For example, COLUMN1 may have a blue background with a yellow ampersand (&) and COLUMN2 may have a blue background with a white ampersand (&). The color scheme varies depending on how the Parameter Groups were assigned (one variable for each selected column or one variable for all selected columns).

3. Select the column or columns for which you want to remove the Parameter group assignment.

4. On the Data tab in the Guided Reports group, click *Remove from Parameter Group*.

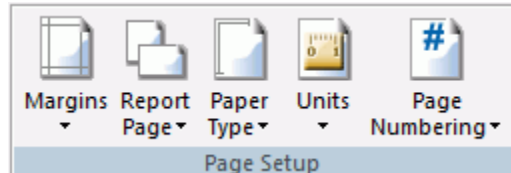
Controlling the Page Properties of a Report Using the Layout Tab

You can control the page properties of a report using the functionality available on the Layout tab. You can change the margin size, page layout, type of material the report will be printed on, the unit of measurement the report uses, page numbering, cell padding, and whether to autofit columns. The Layout tab is located at the top of the App Studio interface. It is available only when you are creating a report. The Layout tab is shown in the following image.



Changing the Page Properties Using the Page Setup Group

You can change the margins, orientation, paper type, unit of measurement, and page numbering of a report. The Page Setup group is shown in the following image.



The commands are:

Margins

Changes the margin dimensions. You can change the margin dimensions using the Custom option or use one of the other four preset margin types, Normal, Narrow, Moderate, or Wide. Selecting Custom opens the Margins dialog box, where you can set each margin value.

Report Page

Changes the orientation of the report page. You can select Landscape or accept the default, Portrait.

Paper Type

Displays a list of paper types and media outlets for the report output.

Units

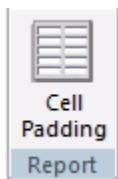
Displays the unit of measurement in inches, centimeters, or points.

Page Numbering

Adds page numbering or removes lead space. You can select *On*, *Off*, or *OFF without lead space*. Select *On* to turn page numbering on. Select *Off* to turn page numbering off. Select *OFF without lead space* to turn off page numbering and the two leading blank lines on each page.

Applying Cell Padding Using the Report Group

You can change the way that columns are shown. The Report group is shown in the following image.



The commands are:

Cell Padding

Edits the space between the gap values in the cascading style sheet. The cell padding displays values that indicate the top, left, bottom, and right margins. The values increment by 1/100 of an inch. For more information, see [How to Access the Cell Padding Dialog Box](#) on page 361.

Procedure: How to Access the Cell Padding Dialog Box

1. On the Layout tab, in the Report group, click *Cell Padding*.

The Cell Padding dialog box displays.

2. Enter values for Top, Bottom, Left, and Right.

Note: Values increment by 1/100 of an inch.

3. Click *OK*.

Applying Data or Field View Preferences Using the View Tab

You use the View tab to change the way that you view your data or fields. The View tab is shown in the following image.



Changing the Data or Field View Using the Object Inspector Group

You can change the way that you view your data or fields. When a command is used on the Object Inspector group, that same option is respected on the Object Inspector shortcut menu. The Object Inspector group is shown in the following image.



The command types are:

Dimension View

Enables you to view the hierarchical structure of the data if there is a dimension view defined in the Master File. Options include No Extended Information, Alias, Title, and Description. The default is No Extended Information.

List View

Enables you to view fields in a list. You can select one or more field categories to view, including Sort Field List, Name, Alias, Title, Description, Format, and Type. Name and Description are selected by default.

Tree View

Enables you to view fields by type in a tree showing the relationship between the segments. Options include No Extended Information, Alias, Title, and Description. The default selection is No Extended Information.

Show Qualified Fields

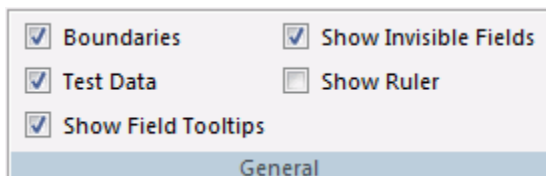
Enables you to display any list of field names as qualified field names, which includes data sources and table names.

Field Details Section

Enables you to display the field details section in the Object Inspector.

Displaying and Hiding View Components Using the General Group

Allows you to display boundaries, test data, tooltips, invisible fields, and the ruler. The General group is shown in the following image.



Boundaries

Enables you to show or hide the boundaries for report objects, such as headings and footings.

Test Data

Enables you to display test data in design mode.

Show Field Tooltips

Enables you to display tooltips.

Show Invisible Fields

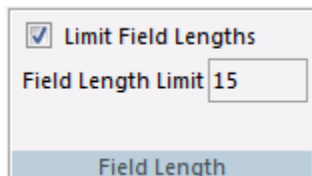
Enables you to display hidden fields.

Show Ruler

Enables you to display the standard ruler at the top of the Report canvas.

Limiting the Field Length of Data Using the Field Length Group

Allows you to edit the amount of data displayed by a field. The Field Length group is shown in the following image.



Limit Field Lengths

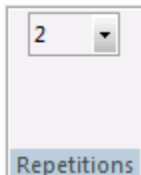
Enables you to limit the length of data displayed by a field at design time.

Field Limit Length

Enables you to set the maximum length of a field in your report. This option is only available when Limit Field Lengths is selected.

Specifying the Number of Test Data Instances Using the Repetitions Group

Allows you to edit the amount of data displayed by a field. The Repetitions group is shown in the following image.

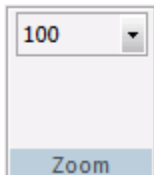


Repetitions

Enables you to specify the number of test data instances that appear for a field. The default value is 2. You can select 1, 2, or 3.

Specifying the Size of the Report Canvas Using the Zoom Group

Allows you to edit the amount of data displayed by a field. The Zoom group is shown in the following image.

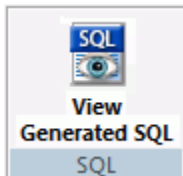


Zoom

Enables you to specify the size (magnification/scale) of the Report canvas. For example, 100%, 75%, 50%, or 25%. The default value is 100%.

Viewing Report-Generated SQL Using the SQL Group

Allows you to view the SQL code your report generates. The SQL group is shown in the following image.

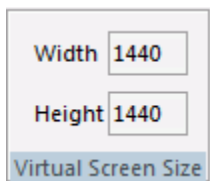


View Generated SQL

Allows you to view the SQL code generated by your report in a separate viewer. This command is only available if you are creating a report using an RDBMS data source.

Determining Report Space in an HTML Page Using the Virtual Screen Size Group

The Virtual Screen size group lets you set how much space the report will occupy when displayed in an HTML page. The Virtual Screen Size group is shown in the following image.



Width

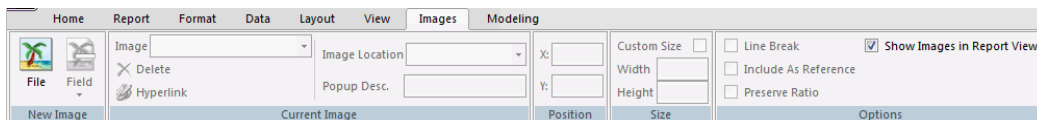
Sets the width your report will occupy when displayed in an HTML page.

Height

Sets the height your report will occupy when displayed in an HTML page.

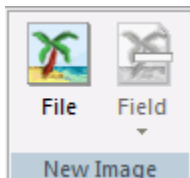
Adding or Editing Images in a Report Using the Images Tab

You use the Images tab to add images to your report or edit images that are already inserted into your report. The Images tab is shown in the following image.



Inserting a New Image in a Report Using the New Image Group

Allows you to insert a new image into your report. The New Image group is shown in the following image.



File

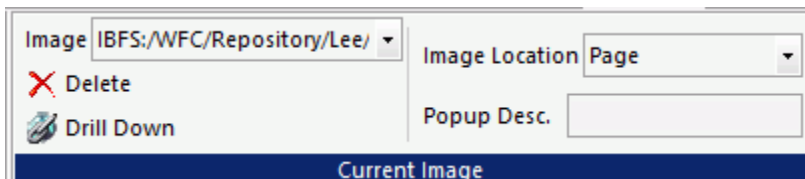
Enables you to select an image file to insert into your report.

Field

Inserts a new image into your report by using a field that specifies the image file name. This option is enabled if the image is placed in an alpha-numeric field in a header or footer.

Managing a Selected Image Using the Current Image Group

Allows you to select a specific image, delete an image, make an image a drill down, change the location of the selected image, and add a pop-up description to the selected image. This group is unavailable if there is no image in your report. The Current Image group is shown in the following image.



Image

Displays the name of the selected image. You can change the selected image by clicking the arrow and selecting the image name.

Delete

Deletes the selected image.

Drill Down

Opens the Drill-down dialog box where you can make your image a drill-down procedure or a hyperlink to a URL.

Image Location

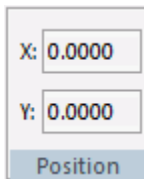
Displays where the image is located. You can click the arrow to change the image location to either the page or the background.

Popup Desc.

Displays the pop-up description for an image.

Changing the Position of an Image in a Report Using the Position Group

Allows you to change the horizontal and vertical position of the selected image. The Position group is shown in the following image.


X

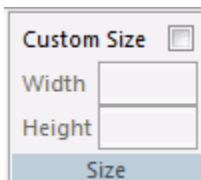
Displays the horizontal position of the selected image.

Y

Displays the vertical position of the selected image.

Specifying Image Size Using the Size Group

Allows you specify whether the selected image will have a set size or custom size. The Size group is shown in the following image.


Custom Size

Allows you to select whether the image will have a set size or a custom size. When selected, you can enter values into the Width and Height fields.

Width

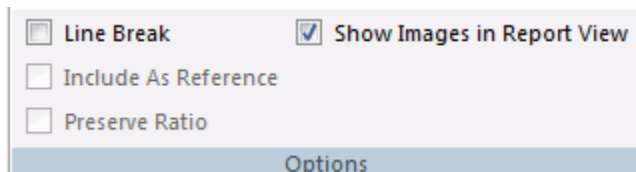
Specifies the width of the selected image. This field is unavailable when Custom Size is not selected.

Height

Specifies the height of the selected image. This field is unavailable when Custom Size is not selected.

Setting Options for a Selected Image Using the Options Group

Allows you to set various options pertaining to the selected image. The Options group is shown in the following image.



Line Break

Adds a line break after the selected image, when selected.

Include As Reference

Includes the current image as a reference, when selected.

Preserve Ratio

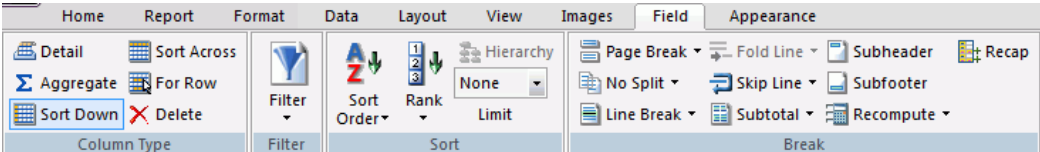
Keeps the aspect ratio of the selected image.

Show Images in Report View

Shows images when in report view. This option is selected by default.

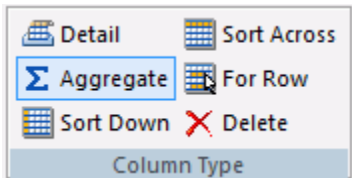
Setting Field Preferences Using the Field Tab

You use the Field tab to change the field type, filter specific fields, sort data in fields, and style the titles and data of a field. The Field tab is located at the top of the App Studio interface. It is accessible only when a field is selected on the Report canvas. The Field tab is shown in the following image.



Specifying the Type of Field Using the Column Type Group

You can change the field type of a selected field. The Column Type group is shown in the following image.



The command types are:

Detail

Changes the field type of the selected field to Detail.

Aggregate

Changes the field type of the selected field to Aggregate.

Sort Down

Changes the field type of the selected field to Sort Down.

Sort Across

Changes the field type of the selected field to Sort Across.

For Row

Changes the field type of the selected field to For Row.

Delete

Deletes the selected field or column.

The Report canvas uses smart context functionality to determine what column type a field should be, given the metadata of the field and/or the position of the field on the canvas.

If smart context is on, and the metadata indicates that a field should be a measure or dimension, when you add that field to the canvas, it will automatically be added as an aggregate or sort down field type, respectively.

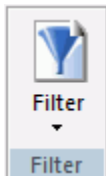
If smart context is on, but the metadata does not indicate whether a field is a measure or dimension, then alphanumeric fields and date fields are added as BY fields, while numeric fields are added as SUM fields.

If smart context is off, all fields are added as DETAIL fields.

If smart context is on, and you try to add a numeric field between two alphanumeric fields, a message will appear, prompting you to either add the field as a sort or an aggregate. If you try to add an alphanumeric field between two numeric fields, a message will also appear, prompting you to either add the field as a COUNT or as an aggregate.

Applying a Filter to a Field Using the Filter Group

You can filter fields when creating a report. The Filter group is shown in the following image.



The commands are:

Filter

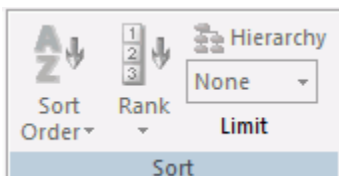
Filters fields using Where, If, Where Total, and Limits screening options. You can access the Expression Builder by selecting Where, If, or Where Total from the Filter drop-down list.

Using the Expression Builder, you can create expressions quickly by selecting fields, relations, operators, and values from lists. You can base selection criteria on a specified value, a variable value, or a field value. For more information, see [Creating Expressions Using the Expression Builder](#) on page 312.

If you select Limits, the Retrieval Limits dialog box opens where you can set the Record Limit and Read Limit values. This enables you to set how much data is shown or previewed.

Sorting, Ranking, and Limiting Data Using the Sort Group

You can sort data, rank data, or limit the amount of data shown. These options are enabled only when Sort Down is selected in the Column Type group. If Sort Across is selected, the options for Up and Down are available. The Sort group is shown in the following image.



The commands are:

Up

Sorts column data from lowest to highest value. If the values were alphabetical, this option would place the columns in alphabetical order.

Down

Sorts column data from highest to lowest value. If the values were alphabetical, this option would place the columns in reverse alphabetical order.

Variable

Enables the user to select the sort order at run time.

Rank

Allows you to enable or disable numeric ranking for the selected column. This is particularly useful when sorting a report vertically.

Hierarchy

Sorts and formats a hierarchy, showing the parent and child relationships.

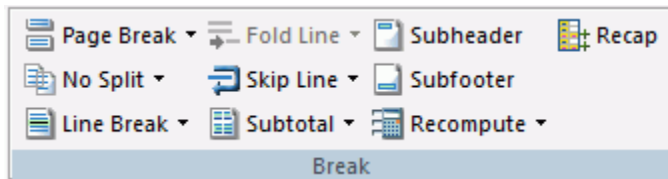
Note: This option is only available when using a multidimensional data source.

Limit

Limits the number of sort values shown. The options are 5, 10, 15, None, and Variable. When you use Limit with Up, the chosen number of lowest values is shown. When you use Limit with Down, the chosen number of highest values is shown. Limit is available only when the selected field is a By field.

Specifying Sort Field Break Options Using the Break Group

You can add a page break, line break, subheading or subfooting, and subtotal columns. You can also recompute calculated values and recap calculated values. The Break group is shown in the following image.



The commands are:

Page Break

Starts a new report page when the value of a selected sort field changes. Options include On, Off, Variable, or Restart Page Numbering. The default value is Off.

No Split

Breaks sort fields logically and regenerates the field heading on the next page or screen. Options include On, Off, or Variable. The default value is Off.

Line Break

Inserts a line break at a specified point in the report. The options are On, Off, or Variable. The default value is Off.

Fold Line

Causes columns to be placed on a separate line when the value of the sort field changes. This feature is not supported for HTML styled report formats. Click Variable to make the option a parameter whose value is prompted for at run time. Click the ampersand (&) to change the parameter name suffix, display text, order of values, and display or return values.

Skip Line

Skips a line on a report when the value of the selected sort field changes. To apply this action in HTML styled report formats, ensure that a cascading style sheet is selected. Click Variable to make the option a parameter whose value is prompted for at run time. Click the ampersand (&) to change the parameter name suffix, display text, order of values, and display or return values.

Subtotal

Adds a subtotal for the selected column or on all outer sort fields. The options are Apply to selected column or Apply to all outer sort fields. The Layout tab appears, where you can modify the Page Setup.

Subheader

Inserts a subheader for the selected column into the report. The Layout tab appears, where you can modify the Page Setup.

Subfooter

Adds a subfooter for the selected column into the report. The Layout tab appears, where you can modify the Page Setup.

Recompute

Recalculates totals for the selected column or on all outer sort fields. Recalculates only at the specified sort break, similar to Subtotal.

Recap

Creates subtotal values in a calculation for the selected column.

Accessing the Field Properties Dialog Box

The Field Properties dialog box contains options that pertain to the selected field. You can access the Field Properties dialog box by using the shortcut menu of a field, on the Report canvas, and clicking *Options*. You can also access the Field Properties dialog box by double-clicking a field on the Report canvas.

Reference: Field Properties General Tab

Select a Detail or Aggregate field on the Report canvas and click *Options* from the shortcut menu to open the Field Properties dialog box at the General tab.

Output

New Line (OVER) places field names over one another. This is one way to decrease the width of a report, particularly when you are sorting horizontally (Across).

Within

Select a WITHIN phrase, which requires a BY phrase and/or an ACROSS phrase. A maximum of two WITHIN phrases can be used per display command.

First Within (BY)

Select a first WITHIN phrase.

Second Within (ACROSS)

Select a second WITHIN phrase, if necessary.

Reference: Field Properties Sort Tab

Select a Sort By field on the Report canvas and click *Options* from the shortcut menu to open the Field Properties dialog box at the Sort tab.

Sorting Tab

The sorting tab contains options for how to sort the selected field data.

Current Sort Statement

Reflects the sort conditions that are in effect.

Sort Limit

Limits the number of sort values to display.

Subtotal others

Subtotals the items selected.

Title

The title of the limit item.

Total

These options pertain to the total of an item.

- ☐ **On.** Calculates and displays the total.
- ☐ **Off** Does not calculate or display the total. This is the default option.
- ☐ **Variable.** Makes the option a parameter whose value is prompted for at run time. Clicking the ampersand (&) button opens the Guided Variable Definition dialog box, which enables you to change the parameter name suffix, display text, order of values, and display or return values.

Sort Sequence

The Sort Sequence button opens the Sort Sequence Builder, which allows you to pull in data from a field and customize sorting priorities.

Grouping Tab

The Grouping tab is only available when you sort a report using a numeric sort field.

Current Sort Statement

Reflects the sort conditions that are in effect.

Grouping

None

No grouping option will be in effect. This is the default option.

IN-GROUPS-OF

Groups sort field values in specified increments.

IN-RANGES-OF

Defines the range by which sort field values are grouped.

Variable

Variable makes the option a parameter whose value is prompted for at run time. Click the ampersand (&) button to open the Guided Variable Definition dialog box, which enables you to change the parameter name suffix, display text, order of values, and display or return values.

Range or Number of Tiles

Allows for a range of number tiles to be present with the grouping.

- ☐ None is the default option.
- ☐ Variable makes the option a parameter whose value is prompted for at run time. Click the ampersand (&) button to open the Guided Variable Definition dialog box, which enables you to change the parameter name suffix, display text, order of values, and display or return values.

Limit

If specified, this value limits the number of groups of the specified interval to be retrieved.

- ☐ **On.** Allows for a limit to be in place.
- ☐ **Off.** Does not allow for a limit to be in place. This is the default option.

- ☐ **Variable.** Makes the option a parameter whose value is prompted for at run time. Click the ampersand (&) button to open the Guided Variable Definition dialog box, which enables you to change the parameter name suffix, display text, order of values, and display or return values.

Highest Value

In order to use the Highest Value option, Limit must be set to On or Variable. This option enables you set the highest value for the limit.

- ☐ None is the default option.
- ☐ Variable makes the option a parameter whose value is prompted for at run time. Click the ampersand (&) button to open the Guided Variable Definition dialog box, which enables you to change the parameter name suffix, display text, order of values, and display or return values.

Tiles

Select this option to group numeric data into any number of tiles (percentiles, deciles, quartiles, and so on). A new column, labeled TILE by default, is added to the report output and displays the tile number assigned to each instance of the tile field.

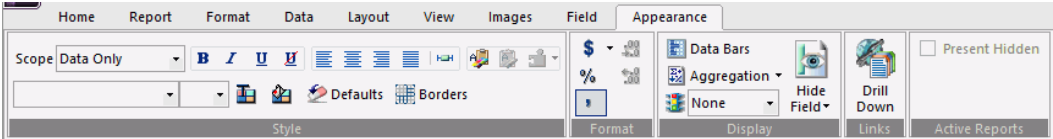
Title

You may type in a unique title name.

You can combine these selections with the list of defined Actions.

Formatting and Styling Report Fields Using the Appearance Tab

You use the Appearance tab while creating or editing a report to filter specific fields, sort data in a field, and style the titles and data of a field. The Appearance tab is located at the top of the App Studio interface. It is only accessible when a field is selected on the Report canvas. The Appearance tab is shown in the following image.



Styling Data, Titles, and Text Using the Style Group

You can style data, titles, and text of a selected field. The Style group is shown in the following image.



The commands are:

Scope

Indicates whether style options apply to the data, title, or both.

Bold

Applies bold font formatting to the text or selected object.

Italic

Applies italic font formatting to the text or selected object.

Underline

Underlines the text or selected object.

Left

Aligns the text or selected object to the left.

Center

Aligns the text or selected object to the center.

Right

Aligns the text or selected object to the right.

Default

Applies the default alignment options. In this case, numerals are aligned to the left and text is aligned to the right.

Column Width

Sets column width options.

Copy Style

Copies the style of the selected object, enabling the Paste Style command.

Paste Style

Pastes your copied style settings to the selected field.

Match Style

Copies the specific style settings from one column to another.

Font Name

Changes typed or highlighted text to the selected font.

Font Size

Changes typed text or a selected object to the selected size.

Color

Changes typed text or a selected object to the selected color.

Background Color

Changes the background color. Opens the Color dialog box, where you can select the background color.

Defaults

Resets the typed text or a selected object to the default style settings.

Borders

Turns borders and gridlines on or off.

Changing the Format of Numeric Detail Fields Using the Format Group

Use the tools in the Format group to change the formatting of numeric detail fields. For example, you can add percentage signs to data and indicate currency (with or without symbols). This group is unavailable when the format option or edit option for the selected field are eight characters in length or attempt to go over eight characters in length.

Note: If you select Sort Down, Sort Across, or For Row, the options in the Format group will be unavailable.

The Format group is shown in the following image.



The commands are:

Currency

Adds a currency symbol in front of the field data. Enables the selection of a currency, for example Floating Dollar or Fixed Euro. The symbol used is that of the currency selected. If a Fixed currency is selected, no symbol appears. If a Floating currency is selected, the currency symbol appears.

Percent

Adds a percentage symbol after the field data.

Comma

Enables the display of commas in the field data.

More Decimals

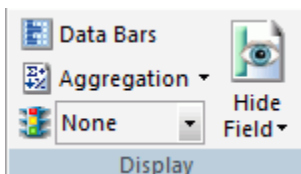
Increases the number of decimal positions shown.

Less Decimals

Decreases the number of decimal positions shown.

Managing Data Visualizations Using the Display Group

You can add a data visualization column to a report, display numeric data differently, and add conditional styling. The Display group is shown in the following image.



The commands are:

Data Bars

Enable the Data Visualization dialog box, through which you can add a data visualization column to the right of a selected numeric field. The column displays values in each row using horizontal bars that extend from left to right in varying lengths, depending on the corresponding data values. For more information, see [Accessing the Data Visualization Dialog Box](#) on page 381.

Aggregation

Displays numeric data using a variety of aggregation types. Different aggregation types are available depending on the field and the column type for that field. These aggregation types are:

- ☐ None
- ☐ Sum
- ☐ Average
- ☐ Count
- ☐ Count Distinct
- ☐ Percent of Count
- ☐ Distinct Values
- ☐ First Value
- ☐ Last Value
- ☐ Minimum
- ☐ Maximum
- ☐ Total
- ☐ Percent
- ☐ Row Percent
- ☐ Median
- ☐ Mode
- ☐ Average Square
- ☐ All

Traffic Lights

You use the Traffic Lights functionality to set styling and hyperlinks conditions. Adds conditional styling or modifies existing conditional styling by applying colors to a field in the output when the field meets specified criteria. Options include None, Forecast, or Add/Edit Conditions. If you select *Add/Edit Conditions*, the selection option changes to *Sorted Data*.

To style a specific condition, select a condition and then use the Style group. This will only style the condition you selected.

The styling you add to a condition appears as a preview in the Report canvas when you select the condition in the Traffic Lights drop-down list box.

Hide Field

You can hide or show a selected field in the output. Fields added to a report or chart are visible in the output by default. Options include On, Off, or Variable. The default value is Off. When a data field is invisible, it appears on the Report canvas (dimmed) and is not visible in the report output.

Note: An invisible column or field may be used in the report as part of a calculation, even though it is set to invisible and will not display in the output.

Accessing the Data Visualization Dialog Box

You use the Data Visualization dialog box to define the data visualization bar graphs that appear in your report.

If you are setting conditions to control the display of bar graphs, you use the Data Visualization Conditional Styling dialog box instead of this one.

The Data Visualization dialog box contains the following fields or options:

Visualize

Initiates the Data Visualization feature.

Color

Specifies the color of the bar graphs. Select a color from the drop-down list. Black is used as the default color.

The color option is the default for HTML, PDF, and PS formats.

Pattern

Specifies the shading patterns for bar graphs. Select a shading pattern from the drop-down list.

This option is only available for PDF and PS formats to make graphs in black and white reports more readable. If the report format is HTML, the Pattern option button is inactive because the shading option is only available for PDF and PS formats.

Graphlook

Specifies how the graph looks. Select a look from the drop-down list.

Note: Graphlook Gauge or Quality do not support negative values. Use Bar Graphs instead.

Scale

Specifies the relative bar graph scaling for multiple report columns under a common Across sort field to which you have applied data visualization.

Note: This option only appears when applied to the entire report.

Choose one of the following options from the Scale drop-down list:

Uniform

Specifies that each vertical bar graph be scaled based on the minimum and maximum values of the entire set of values compiled from each Across column to which you have applied data visualization bar graphs.

Distinct

Specifies that each vertical bar graph be scaled based on the distinct minimum and maximum values for each Across column to which you have applied data visualization bar graphs.

Maximum Length

Specifies the length of the longest bar graph.

Default. The default length of 60 pixels is used for a vertical bar graph and 80 pixels for a horizontal bar graph.

Custom. Sets the value for displaying the vertical or horizontal bar graph for the maximum data value in the associated report column. This value must be a positive number.

This value is initially expressed in the current windows measurement units (inches, centimeters), then converted into the corresponding number of pixels.

Width

Specifies the width of the bar graphs in a report.

Default. This value is preset based on the current font size.

Custom. Sets the value for displaying the width of the bar graphs in a report. This value must be a positive number.

This value is initially expressed in the current windows measurement units (inches, centimeters), then converted into the corresponding number of pixels.

Default Values button

Resets all defaults.

Conditional Styling button

Opens the Data Visualization Conditional Styling dialog box where you can define conditions and colors for bar graphs.

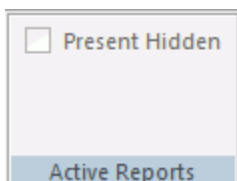
Links Group

You can add a hyperlink or drill-down procedure to a selected field in a report.

Note: The Links group also appears in the Report tab. For more information, see [Creating a Drill-Down Procedure Using the Links Group](#) on page 336.

Showing or Hiding Columns in an Active Report Using the Active Reports Group

You can choose to show or hide columns in an active report, as shown in the following image.

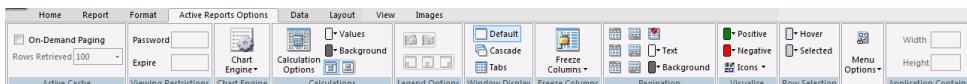


Present Hidden

You can select which columns are hidden from view, in the report output, when using the HTML active report output format.

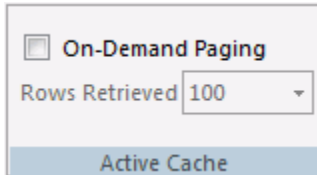
Setting Active Report Options Using the Active Reports Options Tab

You can change the options that apply to an active report. The active report Options tab is located at the top of the App Studio interface and is accessible only when you have selected an active report output. The active report Options tab is shown in the following image.



Changing the Paging of an Active Report Using the Active Cache Group

You can change the paging of a report and the number of rows retrieved. The active cache group is shown in the following image.



The commands are:

On-Demand Paging

When on-demand paging is enabled, the viewer displays one page of report output and navigational controls. You use the navigational controls to change the report page that appears in the viewer.

Your browser consists of two frames, the Report Frame and the Viewer Control Panel frame. The Report Frame is the larger frame and contains one page of report output. When you first run a report, the Report Frame contains the first page of report output.

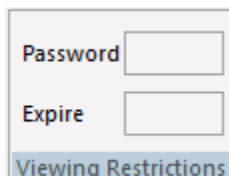
The Viewer Control Panel frame contains the controls you use to navigate through the report and to search for a string. The navigational controls allow you to display the next or previous page, the first or last page, or to display a specific page. You use the searching function to locate a page of the report that contains the search string you specify.

Rows Retrieved

Sets the number of rows displayed in the output. The default value is 100.

Setting a Password and Expiration Date of an Active Report Using the Viewing Restrictions Group

You can set a password to access an active report, and set an expiration date so that an active report is no longer viewable past that date. The Viewing Restrictions group is shown in the following image.



The commands are:

Password

Sets a password that must be entered to view the active report output.

It is a character string up to 32 characters in length. Only standard alphanumeric English characters are allowed in the password for an active report in AHTML format. National Language Support (NLS) characters are not allowed in the password. Any NLS character in the password for an AHTML report makes the password invalid.

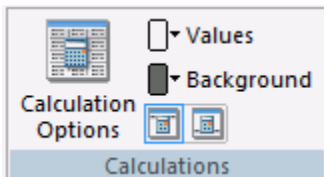
Expire

The date when an active report expires and the report output can no longer be viewed (displayed).

Enter the expiration date in year, month, day (yymmdd) format or in day format (1-999 DAYS) where the value indicates the number of days from the current date that the report expires. Valid values are 1 to 999 days. Note that you must enter the number and the word DAYS as part of the value.

Setting Preferences for Calculations Using the Calculations Group

You can set the color, position, and options available for calculations. The Calculations group is shown in the following image.



The commands are:

Calculation Options

Enables you to turn on calculations for fields in the report. All visible fields in the report appear in the Column list in the order they appear in the report. Hidden fields do not appear in the Column list.

You can select a calculation for each field in the Column list from the Calculations dialog box. Calculation options are determined by the field type. If the field is in an alphanumeric format, the drop-down list contains Count and Count Distinct. If the field is a numeric format, the drop-down list contains Sum, Average, Count, Count Distinct, Minimum, and Maximum.

Values

Opens the Color dialog box, where you can set the color of calculation values.

Background

Opens the Color dialog box, where you can set the background color of calculations.

Top

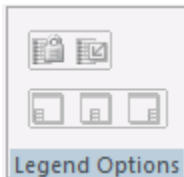
Displays calculations at the top of the report.

Bottom

Displays calculations at the bottom of the report.

Setting Preferences for Legends Using the Legend Options Group

You can change the visibility, collapsibility, and position of the legend. The Legend Options group is shown in the following image.



The commands are:

Fixed

Sets the legend to always be visible.

Collapsible

Sets the legend to be collapsible.

Bottom Left

Minimizes the legend and moves it to the bottom left.

Bottom Center

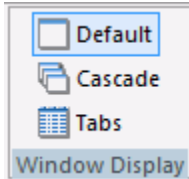
Minimizes the legend and moves it to the bottom center.

Bottom Right

Minimizes the legend and moves it to the bottom right.

Setting Display Options for Multiple Reports Using the Window Display Group

You can display multiple reports differently. The Window Display group is shown in the following image.



The commands are:

Default

View multiple reports with default windows.

Cascade

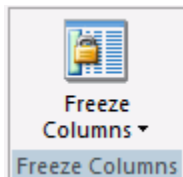
View multiple reports with cascading windows.

Tabs

View multiple reports in one window with a tab for each report.

Freezing Columns of a Report Using the Freeze Columns Group

You can freeze the selected column and all columns to the left of that column. The Freeze Columns group is shown in the following image.



The command is:

Freeze columns

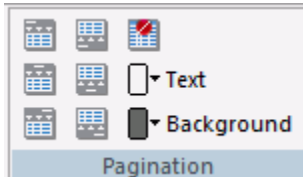
Freezes the report at a particular point so that columns to the left of the freeze point remain in view while you scroll through the other report columns. You can select any of the fields present on the Report canvas to freeze the report at that point, or you can select *None* to turn off the Freeze option.

If the report can be fully viewed in the browser window, then freeze is not applied.

The Freeze columns option is not available for expandable report (Accordion) views.

Setting Display Options for the Status Bar and Navigation Bar Using the Pagination Group

You can set the location and color of the status bar and page navigation bar. You can also specify whether or not to display these bars. The Pagination group is shown in the following image.



The commands are:

Top Left

Sets the record status bar and page navigation bar to display on the top left.

Top Center

Sets the record status bar and page navigation bar to display on the top center.

Top Right

Sets the record status bar and page navigation bar to display on the top right.

Bottom Left

Sets the record status bar and page navigation bar to display on the bottom left.

Bottom Center

Sets the record status bar and page navigation bar to display on the bottom center.

Bottom Right

Sets the record status bar and page navigation bar to display on the bottom right.

Off

Sets the record status bar and page navigation bar to not display.

Text

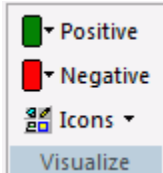
Sets the text color for the record status bar and page navigation bar. Opens the Color dialog box.

Background

Sets the background color for the record status bar and page navigation bar. Opens the Color dialog box.

Designating Colors for Positive and Negative Values in a Report Using the Visualize Group

You can apply data visualization to numeric fields in an active report. You can designate the colors of the bars and set different colors for positive and negative values. The default color for positive and negative values is black. The Visualize group is shown in the following image.



The commands are:

Positive

Sets the color for positive numeric values. Opens the Color dialog box.

Negative

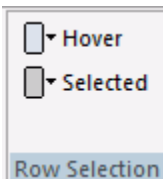
Sets the color for negative numeric values. Opens the Color dialog box.

Icons

Sets which icon set to use for your active report.

Setting the Color of a Row in a Report Using the Row Selection Group

You can set the color of a row of data when you pause the mouse pointer on the row or when you select the row. The Row Selection group is shown in the following image.



The commands are:

Hover

Sets the color of a row of data when you pause the mouse pointer on the row. Opens the Color dialog box.

Selected

Sets the color of a row of data when you select that row. Opens the Color dialog box.

Setting the Color of Menu Items in a Report Using the Menu Options Group

You can make specific options available in the active report and set the color of menu items. Click the Launch button on the bottom of the Menu Options group to display the Customize User Interactivity box.

The options are:

Show Records

Adds pagination options when selected.

Filter

Adds filter options when selected.

Freeze

Adds freeze options when selected.

Calculations

Adds calculation options when selected.

Hide/Unhide

Adds hide options when selected.

Chart

Adds chart options when selected.

Export

Adds exportation options when selected.

Visualize

Adds visualization options when selected.

Sorting

Adds sorting options when selected.

Rollup

Adds rollup options when selected.

Pivot (Cross Tab)

Adds pivot options when selected.

Comments

Adds comment options when selected.

Window Type

Adds window options when selected.

Restore Original

Adds restoration options when selected.

Send as Email

Adds email options when selected.

Save Changes

Adds save options when selected.

Print

Adds print options when selected.

Accordion

Adds accordion options when selected.

Advanced Tools

Adds tool options when selected.

Grid Tool

Adds grid options when selected.

Font Text

Sets the color of menu text. Opens the Color dialog box.

Font Hover

Sets the color of menu text when you pause the mouse pointer on menu text. Opens the Color dialog box.

Menu Background

Sets the background color of menu text. Opens the Color dialog box.

Menu Hover

Sets the background color of menu items when you pause the mouse pointer on the menu items. Opens the Color dialog box.

Menu Border

Sets the color of the border for menu text. Opens the Color dialog box.

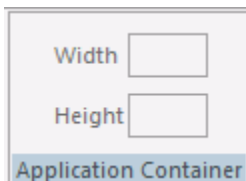
User Level

Sets predefined options for the following user levels:

- ☐ **Default.** Enables all options listed above except Advanced Tools and Grid Tool.
- ☐ **Power.** Enables all options listed above.
- ☐ **Analytical.** Enables the following options: Show Records, Filter, Freeze, Calculations, Hide/Unhide, Chart, Export, Visualize, Sorting, Window Type, Restore Original, Send as Email, Save Changes, Accordion.
- ☐ **Business.** Enables the following options: Show Records, Freeze, Calculations, Hide/Unhide, Visualize, Sorting, Restore Original, Send as Email, Save Changes, Print.
- ☐ **Custom.** If you select a combination of options that does not match one of the predefined user levels (Default, Power, Analytical, Business), the name *Custom* appears in the User Level field. This is not a default user type or a selectable user type. It is used to show that options for this user do not match any of the predefined user levels.

Setting the Width and Height for an Active Report Using the Application Container Group

Sets the width and height of FLEX or APDF formatted active reports. The Application Container group is shown in the following image.



Width

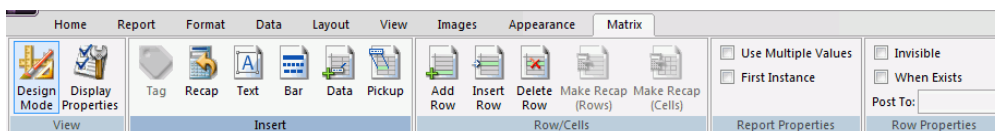
Sets the width of the active report container for FLEX or APDF formatted reports.

Height

Sets the height of the active report container for FLEX or APDF formatted reports.

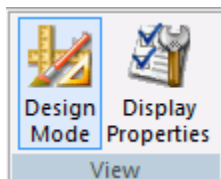
Creating Financial Reports Using the Matrix Tab

You can create, calculate, and present financially oriented data such as balance sheets, consolidations, profit and loss statements, budgets, and certain government mandated reports. These reports are distinguished from other WebFOCUS reports because calculations are inter-row as well as inter-column. Each row or line represents a unique entry or series of entries that can be aggregated directly from the input data, or calculated as some function of the data. The Matrix tab is located at the top of the App Studio interface and is only accessible when a FOR field is selected on the Report canvas and the Matrix tab is selected from the bottom of the Report canvas. The Matrix tab is shown in the following image.



Changing the Report Mode Using the View Group

You use the View group to change the type of a field. The View group is shown in the following image.



The commands are:

Design Mode

Toggles the report between Design mode and Preview mode. Design mode is used to assist you in the creation of your report, and Preview mode allows you to preview what a user will see at run time.

In Preview mode, the Report canvas displays the following:

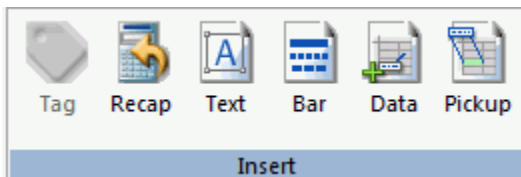
- ❑ In the first column, a label assigned to each row in the report such as R1 and R2 (or an explicit row label if you have supplied one).
- ❑ In the second column, default titles, or titles you assigned to rows in the report, representing TAG values of the FOR field and other row types.
- ❑ In subsequent columns, any other fields you specified for the report.

Display Properties

Shows the properties of the selected row in a dialog box named after the row type. For example, if your row was the DATA type, the DATA dialog box opens. You can edit the properties for that row from this dialog box.

Inserting a Specific Row Type Using the Insert Group

You can use the Insert group to insert or change a row in a report. The type depends on which button you click. You can choose between Tag, Recap, Text, Bar, Data, and Pickup. You can also change a row to a different type using the shortcut menu on the Report canvas. The Insert group is shown in the following image.



The commands are:

Tag

Inserts a tag row or changes a row to a tag row. Tags identify the data values of the FOR field in your report. A report row can be associated with a tag that represents:

- ☐ A single data value of the FOR field.
- ☐ The aggregate of two or more data values of the FOR field.
- ☐ The aggregate of a range of data values of the FOR field.
- ☐ The aggregate of a related group of data values of the FOR field.

You can also identify tag values that are organized in a parent/child hierarchy up to 99 levels deep and extending over many rows in the matrix.

The Tag command opens the TAG dialog box, from which you can define all of these variations.

Recap

Opens the RECAP dialog box, where you can create an expression that derives the value of the RECAP row and assign row properties. Recaps enable you to perform calculations on data in the rows of a report to produce new rows.

To initiate a Recap operation, you must supply the format of the value that will receive the result of the calculation, and an expression that defines the calculation you wish to perform. Initially, the default row label (R1, and so on) serves as the identifying label for the calculated value. However, it is good practice to provide a more descriptive label for reference in other calculations.

Text

Opens the TEXT dialog box, where you can enter a row of text, or a blank row. Type up to 256 characters in the text field or leave it blank to insert a blank row to the report.

Bar

Opens the BAR dialog box, where you can add an underline character below columns of numbers. The options include a single or double underscore character.

Data

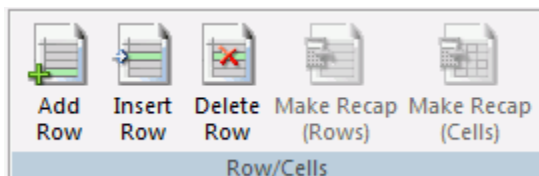
Opens the DATA dialog box, where you can assign properties, such as title and label, to a row whose data you supply directly in the request, rather than retrieving it from a data source.

Pickup

Opens the PICKUP dialog box, where you can assign row properties, such as title and label, and indicate the name of a file from which to pick up a row of previously posted data.

Creating and Editing Rows and Cells Using the Row/Cell Group

You use the Row/Cell group to create and edit rows and cells. The Row/Cell group is shown in the following image.



The commands are:

Add Row

Adds a blank row at the bottom of the matrix.

Insert Row

Inserts a blank row between two existing rows.

Delete Row

Deletes the selected row.

Make Recap (Rows)

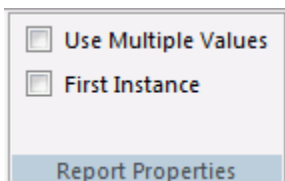
Creates a RECAP row based on the sum of other values in the matrix.

Make Recap (Cells)

Creates a RECAP cell based on the sum of other values in the matrix.

Controlling Report Properties Using the Report Properties Group

You use the Report Properties group to control report properties. The Report Properties group is shown in the following image.



The commands are:

Use Multiple Values

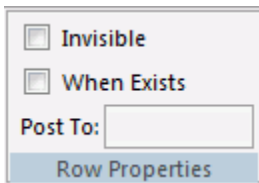
Allows you to add the same data value to multiple rows.

First Instance

When enabled, adds the .FST to all summed numeric columns, ensuring that the shared value is only counted once.

Controlling Row Properties Using the Row Properties Group

You use the Row Properties group to control row properties. The Row Properties group is shown in the following image.



The commands are:

Invisible

When enabled, hides the selected row.

When Exists

When enabled, you can hide a row, if no data exists in that row.

Post To

You can enter the name of a file you want to add to a row of output.

Accessing WebFOCUS RStat Using the Modeling Tab

You can use the Modeling tab to access WebFOCUS RStat, a statistical modeling workbench that is embedded in App Studio. You can perform common statistical and data mining tasks, and develop models that can be deployed as scoring applications on every platform. RStat enables data miners and Business Intelligence developers to collaborate with the same tools used to access, manipulate, or transform data, develop predictive models, and create and deploy scoring applications along with associated reports to any worker within their organization.

You can pass any data generated from the Report canvas directly into RStat. After you pass the data to RStat, you can develop your data, join various data sources, build virtual fields, and create data sets to pass to RStat for modeling. The Launch button extracts the data defined within your report and loads it directly into RStat. Within each report, you can customize the name of the hold file that you create, and the location at which it is stored. If you do not customize the name and location of the hold file, a default name and location are assigned.

Note: The Modeling tab is only accessible when RStat is installed.

Launching RStat Using the Modeling Group

You can run RStat and edit the RStat configuration model options. You can also conduct sampling activities. The commands are:

Launch

Extracts the data defined in your report and loads it directly into RStat. RStat opens in a new window.

Note: The file name that loads in RStat is that which you define on the RStat Model Configuration dialog box. The default file name is HOLD (HOLD.CSV).

Parameters

When you click the Parameters button, the RStat Model Configuration dialog box displays. In this dialog box, you can name the hold file that will be used to pass the model data from the Report canvas into RStat (the default file name is HOLD). You can also define the directory in which the hold file should be placed. You can customize the default hold path for your procedures (.fex files). Your model configuration parameters are saved when you exit the RStat Model Configuration dialog box.

Sampling

Opens the Sampling dialog box. You can generate statistically representative data extracts for data examination and modeling purposes. You can select Random, Numeric Stratified, or Categorical Stratified sampling.

You can also disable sampling. Each option contains a set of criteria that you can edit for the sampling.

Note: In order for sampling to work, you must select a data field prior to clicking Sampling. If you do not select a data field, the message *No field is available for sampling* will be the only item that appears in the dialog box.

Procedure: How to Launch RStat

1. Create a report in App Studio.
2. Add fields to the report.
3. On the Modeling tab, in the Modeling group, click the RStat icon.
RStat launches in a separate window.
4. Optionally, customize the variables that are imported into RStat.

Note: The fields that you define on your Report canvas are imported into RStat in the order specified in your report.

For more information on using RStat, see the *Using WebFOCUS RStat for Predictive Analytics* manual.

Procedure: How to Set Parameters Using the RStat Model Configuration

You use the Parameters option to specify a name for the data file, as well as an output directory.

1. On the Modeling tab, in the Modeling group, click *Parameters*.

The RStat Model Configuration dialog box displays.

2. In the Hold File Name field, enter a name for the file or optionally browse to select an existing file.

Note: The default Hold file name is HOLD and displays in the file name field on the Data tab in RStat. If you change the name of the file on the RStat Model Configuration dialog box, this revised file name is reflected in RStat.

3. In the Hold File Path field, enter or select a path in which to save the file.

Note: You can restore the original drive and directory by clicking Default.

4. Click OK.

When you launch RStat, this file name is the default Hold file used upon entry into the application.

Working With Sampling Functionality

The sampling functionality is accessible through the Modeling tab in App Studio. Sampling offers three sampling techniques: Random, Numeric Stratified, and Categorical Stratified.

- ❑ **Random Sampling** is a basic sampling technique where you select a group of subjects (a sample) from a larger group (a population). Each individual is chosen entirely by chance and each member of the population has an equal chance of being included in the sample.
- ❑ **Stratified Sampling** is obtained by taking separate samples from each sub-group of a population (commonly referred to as a stratum).

When you sample a population, stratified sampling allows us to ensure that the proportion of each stratum in the sample is the same as in the population. Numeric stratified sampling is used when the field identifying the strata is a number and can be defined in terms of a range. Categorical stratified sampling is used for all other data.

Accessing sampling criteria within the Modeling tab requires that at least one field is defined within the report extract. If no fields have been defined, you will receive a warning message informing you that no fields are available for sampling and the Sampling tab will be present, but no actions will be available. For Random Sampling, which is not tied to a specific field value, any field will open the option. For Stratified sampling, the stratum field (the field on which the strata will be defined) must be included in the report.

Basic Sampling Concepts and Terminology

To produce a valid output sample, each sampling definition requires information about the file to be sampled. In each sampling routine, you can use the sample calculator to calculate the values for each of the following or enter your own values:

- ❑ **Population Size.** The number of records in the overall data set to be sampled. Before performing a sampling routine, the population size must be determined. Within the sampling function, the population size can be retrieved at design time, generated live at run time, or defined as a fixed value. Although the population size is usually the total number of records in the file, there will be times when you want to sample a subset of the file. To ensure a statistically valid sample, the specified population size must be the same as the number of records sampled.
- ❑ **Confidence Level.** Is the probability, expressed in percent, that the selected sample will represent the total population. Most guidelines establish a minimum acceptable confidence level of 90%, 95%, or 98%.
- ❑ **Margin of Error.** Represents the amount of error, expressed in percent, that you can tolerate. Lower margins of error require larger sample sizes.
- ❑ **Response Distribution.** Allows you to correct for skewness in the sample (if the sample deviates from the normal standard deviation). Use the Response Distribution percentage to account for the skewness in population.
- ❑ **Seed.** The statistical sampling routines use a seed value for the pseudo random number generator. This generator produces a series of random numbers from the entered seed. These random numbers are then used to determine each record to include in the sample. The seed has no affect on the number of records included in the sample, it only affects which records are selected. A single seed will produce the same set of random numbers, so if you want to replicate a sample, use the same seed, population size, and record order. To generate a unique sample, enter a new seed value each time.
- ❑ **Sample Size.** The number of records that you want to store in the output file. The number should be a positive integer, greater than zero and less than the population size.

Reporting Syntax Summary

This topic summarizes the WebFOCUS reporting commands and options that you can type directly into the Text Editor. For detailed information about these commands and options, see the *Creating Reports With WebFOCUS Language* manual.

```
TABLE FILE filename
HEADING [CENTER]
"text"
{display_command} [SEG.]field    [/R|/L|/C] [/format]
{display_command} [prefixop.] [field] [/R|/L|/C] [/format]
  [NOPRINT|AS 'title1,...,title5'] [AND|OVER] [obj2...obj1024]
[WITHIN field] [IN n]
COMPUTE field [/format] = expression; [AS 'title,...,title5'] [IN n]
[AND] ROW-TOTAL [/R|/L|/C] [/format] [AS 'name']
[AND] COLUMN-TOTAL [/R|/L|/C] [AS 'name']
ACROSS [HIGHEST] sortfieldn [IN-GROUPS-OF qty]
  [NOPRINT|AS 'title1,...,title5']
BY [HIGHEST] sortfieldn [IN-GROUPS-OF qty]
  [NOPRINT|AS 'title1,...,title5']
BY [HIGHEST|LOWEST{n}] TOTAL [prefix_operator] {field|code_value}
RANKED [AS 'name'] BY {TOP|HIGHEST|LOWEST} [n] field
  [PLUS OTHERS AS 'othertext']
  [IN-GROUPS-OF qty [TILES [TOP m]] [AS 'heading']]
  [NOPRINT|AS 'title1,...,title5']

{BY|ACROSS} sortfield IN-RANGES-OF value [TOP limit]
ON sfld option1 [AND] option2 [WHEN expression;...]
ON sfld RECAP fld1 [/fmt] = FORECAST (fld2, intvl, npredict,
  ' {MOVAVE|EXPAVE}', npnt);

ON sfld RECAP fld1[/fmt] = FORECAST(fld2, interval, npredict, 'DOUBLEXP',
  npoint1, npoint2);

ON sfld RECAP fld1[/fmt] = FORECAST(fld2, interval, npredict, 'SEASONAL',
  nperiod, npoint1, npoint2, npoint3);

ON sfld RECAP fld1 [/fmt] = FORECAST (fld2, intvl, npredict,
  'REGRESS');

ON {sortfield|TABLE} RECAP y[/fmt] = REGRESS(n, x1, [x2, [x3,]] z);
ON sfld RECAP fld1 [/fmt] = FORECAST (infield, interval, npredict,
  'DOUBLEXP', npoint, npoint2);
ON sfld RECAP fld1 [/fmt] = FORECAST (infield, interval, npredict,
  'SEASONAL', nperiod, npoint, npoint2, npoint3);{BY|ON} fieldname
SUBHEAD
  [NEWPAGE]
"text"

{BY|ON} fieldname SUBFOOT [WITHIN] [MULTILINES][NEWPAGE]
"text" [<prefop.fieldname ... >] [WHEN expression;]
```

```

WHERE [TOTAL] expression
WHERE {RECORDLIMIT|READLIMIT} EQ n
IF [TOTAL] field relation value [OR value...]
ON TABLE SET parameter value
ON TABLE HOLD [VIA program][AS name] [FORMAT format] [MISSING {ON|OFF}]
ON TABLE {PCHOLD|SAVE|SAVB} [AS name] [FORMAT format] [MISSING {ON|OFF}]
ON TABLE NOTOTAL
ON TABLE COLUMN-TOTAL [/R|/L|/C] [AS 'name'] fieldname
ON TABLE {ROW-TOTAL|ACROSS-TOTAL}[/R|/L|/C][format] [AS 'name'] fldname
{BY|ON} sfld [AS 'text1'] {SUBTOTAL|SUB-TOTAL|SUMMARIZE|RECOMPUTE}
  [MULTILINES] [pref.] [field1 [pref.] field2 ...] [AS 'text2']
  [WHEN expression;]
{ACROSS|ON} sfld [AS 'text1'] {SUBTOTAL|SUB-TOTAL|SUMMARIZE|RECOMPUTE}
  [AS 'text2'] [COLUMNS c1 [AND c2 ...]]
ON TABLE {SUBTOTAL|SUB-TOTAL|SUMMARIZE|RECOMPUTE}
  [pref.] [field1 [pref.] field2 ...] [AS 'text2']
FOOTING [CENTER] [BOTTOM]
"text"
MORE
FILE file2
  [IF field relation value [OR value...]|WHERE expression]
{END|RUN|QUIT}

```


Creating Charts in WebFOCUS App Studio

A chart often conveys meaning more clearly and effectively than data displayed in tabular form. A chart enables you to visually communicate quantitative information. On a chart, you can give data a shape and form, and reveal patterns and relationships among many data values. A chart can highlight anomalies that require further investigation.

It is important that you choose a chart that is appropriate for your data. App Studio provides a complete chart library of both basic and advanced charts. You can choose from a wide variety of charts to best represent the data that you want to display.

In App Studio, you can create and edit charts using the Chart canvas. When you create a new chart, you use the Chart Wizard.

This topic provides an overview of the types of charts you can create with WebFOCUS App Studio and how to launch the Chart Wizard to create charts.

To access the online Help for charts, click the Help icon  , located in the upper-right corner of the canvas.

In this chapter:

- ❑ [Creating a Simple or Complex Chart](#)
- ❑ [Launching the Chart Wizard](#)

Creating a Simple or Complex Chart

Once you connect to the data that you want to analyze, you can build simple or complex charts. These chart types including the following:

- ❑ **Bar chart.** Plots numeric data by displaying rectangular blocks against a scale. The length of a bar corresponds to a value or amount. Viewers can develop a clear mental image of comparisons among data series by distinguishing the relative heights of the bars. Use a bar chart to display numeric data when you want to present distributions of data. You can create horizontal, as well as vertical bar charts.
- ❑ **Line chart.** Emphasizes the movement or trend of numeric data over time, since they allow a viewer to trace the evolution of a particular point by working backwards or interpolating. Highs and lows, rapid or slow movement, or a tendency toward stability are all types of trends that are well suited to a line chart.

- ❑ **Area chart.** Similar to a line chart, except that the area between the data line and the zero line (or axis) is usually colored or textured. An area chart allows you to stack data on top of each other. Stacking allows you to highlight the relationship between data series, showing how some data series approach or shadow a second series.
- ❑ **Pie chart.** Emphasizes where your data fits in relation to a larger whole. Keep in mind that a pie chart works best when your data consists of several large sets. Too many variables divide the pie into small segments that are difficult to see. Use color or texture on individual segments to create visual contrast.
- ❑ **Scatter chart.** Shows the relationship between two different numeric measures. A scatter chart gives you a sense of trends, concentrations, and outliers that pinpoint where to focus further investigation efforts.
- ❑ **Bubble chart.** Plots data similar to a scatter chart, where the size of each marker is proportional to the value of a third measure.
- ❑ **Treemap chart.** Displays large amounts of hierarchically structured data. Using a set of nested rectangles to illustrate data relationships, sections of a treemap represent branches of a tree.
- ❑ **Gauge chart.** Indicates the current position of a single data value within a given spectrum. This chart has a circular shape. A gauge thermometer chart indicates the current position of a single data value within a given scale. This chart has the shape of a thermometer. It is not available in HTML5.
- ❑ **Pareto chart.** Uses the X axis to show group members, and the Y axis to show the percent of the total of all groups that each group represents. This chart highlights the differences between groups of data.
- ❑ **Box Plot chart.** Shows the distribution of data, vertically or horizontally, through five-number summaries: Upper limit, Upper Quartile, Median, Lower Quartile, and Lower Limit. This chart can be represented with or without outliers, also known as whiskers.
- ❑ **Funnel chart.** Displays only one group of data at a time, from the first series to the last series at the bottom of the funnel. Funnel charts are similar to pie charts.
- ❑ **Pyramid chart.** Displays only one group of data at a time, from the first series to the last series at the top of the pyramid. A pyramid chart is similar to a pie chart.
- ❑ **Heatmap chart.** Displays data in a table where the color of each cell is dependent on the value in the cell. A heatmap chart is similar to a spectral map.
- ❑ **Tagcloud chart.** Displays text data, typically used to depict keywords on websites or to visualize free form text. This format is useful for quickly perceiving the most prominent terms.

In addition to the charts that you can create, you can also create interactive, informative maps. Using the lightweight mapping feature, you can view important information for a region and drill down to view and analyze trends, population changes, or sales data. These chart types include the following:

- ❑ **Choropleth map.** Uses color to differentiate between value groups on a map. It is useful for visualizing location-based data, trends, and distributions across a geographic area.
- ❑ **Proportional Symbol map.** Uses marker size and color to differentiate between the data on a map.

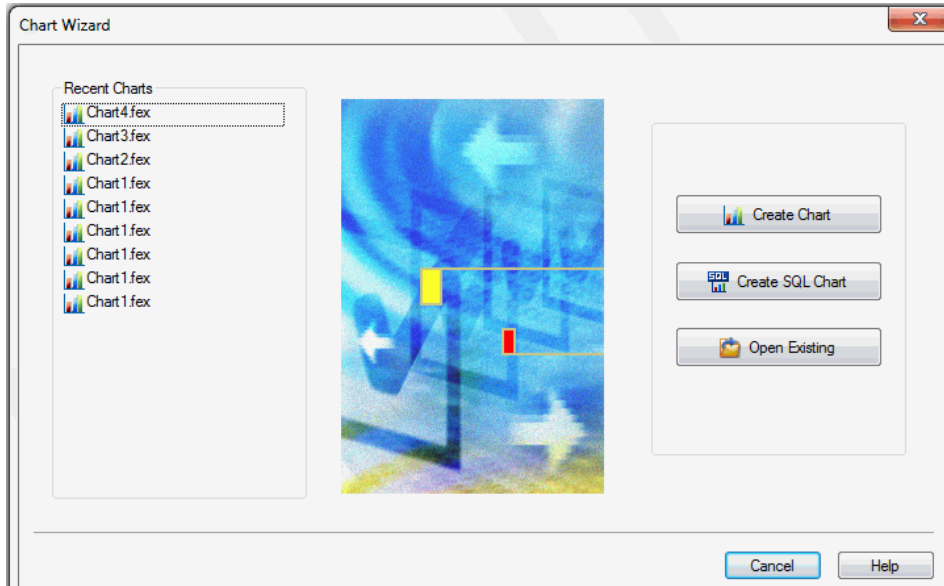
Launching the Chart Wizard

To open the Chart Wizard:

- ❑ On the Home tab, in the Content group, click *Chart*.
- ❑ In the Environments Tree panel, right-click an application folder, point to *New*, and click *Chart*.

Note: If you choose to create a new chart using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Chart Wizard. You will not have to specify whether you are creating a chart or SQL chart. You will instead be brought to the Select Data Source window, with the location for your chart already selected.

The Chart Wizard opens, as shown in the following image.



From the Chart Wizard, you can create a new chart or SQL chart procedure or open a recent procedure.

Procedure: How to Create a Chart Using the Chart Wizard

After you launch the Chart Wizard, you can begin to create your chart procedure.

Note: If you choose to create a new chart using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Chart Wizard. You will not have to specify whether you are creating a chart or SQL chart. You will instead be brought to the Select Data Source window, with the location for your chart already selected.

1. Click *Create Chart*.

The Chart Wizard - Choose location for the new chart window opens.

2. Navigate to where you want to create the new chart and click *Next*.

The Select Data Source window opens.

3. Choose an application folder in the application folder tree, and select a Master File. You can select the Use Qualified Path check box if you want to only display the data sources in the application folder.

4. Click *Finish*.

The Chart canvas opens.

5. Double-click fields in the Data Panel to add them to the chart.

You can use the features and functions on the ribbon that is located in the Chart canvas to format the chart.

6. To save your chart, click the *Save* button on the App Studio Quick Access Toolbar, or select *Save* from the Application menu.
7. To run your chart, click the *Run* button on the App Studio Quick Access Toolbar.

Procedure: How to Create an SQL Chart From an External .sql File

After you launch the Chart Wizard, you can begin to create your SQL chart procedure.

Note: If you choose to create a new SQL chart using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Chart Wizard. You will not have to specify whether you are creating a chart or SQL chart. You will instead be brought to the SQL Chart Wizard - Welcome window, with the location for your chart already selected.

1. Select *Create SQL Chart*.

The Chart Wizard - Choose location for the new chart window opens.

2. Navigate to where you want to create the new chart and click *Next*.

The SQL Chart Wizard - Welcome window opens.

3. Click the *Included from an external '.sql' file* option. This enables you to browse and select external procedures that exist in the repository of the project.
4. Click *Next*.

The SQL Chart Wizard - Data access information window opens.

5. In the Select the SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your Reporting Server configuration.

- ☐ DB2
- ☐ Microsoft SQL Server
- ☐ Teradata CLI
- ☐ Teradata ODBC

- ☐ parAccel
 - ☐ Oracle
 - ☐ Sybase
 - ☐ DB2 for AS/400
 - ☐ SAP BW
 - ☐ Adabas
 - ☐ Greenplum
6. In the Select the connection area, choose a connection from the drop-down list generated from the engine you selected.
 7. Click *Next*.

The SQL Chart Wizard - Include external SQL file window opens.
 8. Click *Browse* to select an external SQL file name or type the external SQL file name in the field.

Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. 100 is the default limit.
 9. Click *Next*.

The SQL Chart Wizard - Summary of SQL options window opens.
 10. Review your options and click *Finish*.

The Chart Wizard - SQL Data Source window opens.
 11. Navigate to where you want to create the new procedure.
 12. In the Enter a Procedure Name field, type a name for the SQL chart.

Note: Typing a procedure name is not required to create a new chart. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.
 13. Click *Select Styling* if you want to edit the style sheet for the chart.
 14. Click *Finish*.

The Chart canvas and the Procedure View panel open. You can now add data to your chart and format the data using the tabs in the ribbon.

Procedure: How to Pass SQL Commands to the RDBMS Using SQL Passthru

After you launch the Chart Wizard, you can begin to create your SQL chart procedure.

Note: If you choose to create a new SQL chart using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Chart Wizard. You will not have to specify whether you are creating a chart or SQL chart. You will instead be brought to the *Chart Wizard - Choose location for the new SQL Chart window*, with the location for your chart already selected.

1. Click *Create SQL Chart*.

The Chart Wizard - Choose location for the new SQL Chart window opens.

2. Navigate to where you want to create the SQL chart and click *Next*.

The SQL Chart Wizard - Welcome window opens.

3. Click *Type SQL statements in the chart request*. This enables you to type SQL commands that will be passed on to the RDBMS with the SQL Passthru feature.

4. Click *Next*.

The SQL Chart Wizard - Data access information window opens.

5. In the Select the SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your Reporting Server configuration.

- ☐ DB2
- ☐ Microsoft SQL Server
- ☐ Teradata CLI
- ☐ Teradata ODBC
- ☐ parAccel
- ☐ Oracle
- ☐ Sybase
- ☐ DB2 for AS/400
- ☐ SAP BW
- ☐ Adabas

☐ Greenplum

6. In the Select the connection area, choose a connection from the drop-down list generated from the engine you selected.
7. Click *Next*.

The SQL Chart Wizard - Enter the SQL statements window opens.

8. In the field box, type the SQL statements you want to pass to the RDBMS.

Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. The default limit is 100.

9. Click *Next*.

The SQL Chart Wizard - Summary of SQL options window opens.

10. Review your options and click *Finish*.

The Chart Wizard - SQL Data Source window opens.

11. Navigate to where you want to create the new procedure.

12. In the Enter a Procedure Name field, type a name for the SQL chart.

Note: Typing a procedure name is not required to create a new chart. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.

13. Click *Select Styling* if you want to edit the style sheet for the chart.
14. Click *Finish*.

The Chart canvas and the Procedure View panel open. You can now add data to your chart and format the data using the tabs in the ribbon.

Procedure: How to Import SQL Commands From an Existing .sql File

You can import commands from existing .sql files.

Note: If you choose to create a new SQL chart using the shortcut menu in the Environments Tree panel, you will skip the first screen of the Chart Wizard. You will not have to specify whether you are creating a chart or SQL chart. You will instead be brought to the *Chart Wizard - Choose location for the new chart* window, with the location for your chart already selected.

1. Open the Chart Wizard and click *Create SQL Chart*.

The Chart Wizard - Choose location for the new chart window opens.

2. Navigate to where you want to create the new chart and click *Next*.

The SQL Chart - Welcome window opens.

3. Click *Import from an existing '.sql' file* and click *Next*. This enables you to modify SQL code after importing it from an external file to the procedure being built. You can modify the request using bits of the code.

The SQL Chart - Data access information window opens.

4. In the Select the SQL database engine area, select a database from the drop-down list. The drop-down list changes depending on your Reporting Server configuration.

- ☐ DB2
- ☐ Microsoft SQL Server
- ☐ Teradata CLI
- ☐ Teradata ODBC
- ☐ parAccel
- ☐ Oracle
- ☐ Sybase
- ☐ DB2 for AS/400
- ☐ SAP BW
- ☐ Adabas
- ☐ Greenplum

5. In the Select the connection area, choose a connection from the drop-down list generated from the engine you selected.

6. Click *Next*.

The SQL Chart Wizard - Import external SQL file window opens.

7. Type the SQL file name that you want to import or click *Browse* to select it.

Optionally, you can run with limited records by clicking *Run SQL*. By default, the *Run with limited records* check box is selected so you can test your procedure with a read limit if the engine supports it. There is a field box next to the check box in which you can enter the number of records to be read. The default limit is 100. You can edit these options here or in the next step.

8. Click *Next*.

The SQL Chart Wizard - Enter SQL statements window opens.

9. In the field box, type the SQL statements you want to pass to the RDBMS.

10. Click *Next*.

The SQL Chart Wizard - Summary of SQL options window opens.

11. Review your options and click *Next*.

The Chart Wizard - SQL Data Source window opens.

12. Navigate to where you want to create the new procedure.

13. In the Enter a Procedure Name field, type a name for the SQL chart.

Note: Typing a procedure name is not required to create a new chart. If you do not type a procedure name in the Enter a Procedure Name field, a default procedure name will be provided until you save the procedure.

14. Click *Select Styling* if you want to edit the style sheet for the chart.

15. Click *Finish*.

The Chart canvas and the Procedure View panel open. You can now add data to your chart and format the data using the tabs in the ribbon.

In App Studio, you can develop multi-component procedures using the Procedure View panel.

This topic explains the components that can make up a procedure and identifies the Procedure View panel.

In this chapter:

- ❑ [Developing Multi-Component Procedures Using the Procedure View Panel](#)
- ❑ [Using Dialogue Manager](#)
- ❑ [Displaying Data Sources in an Application Folder Using the Use Qualified Path Command](#)

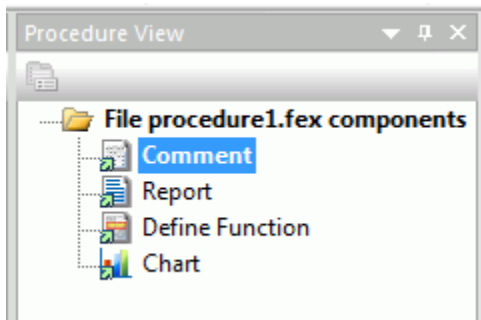
Developing Multi-Component Procedures Using the Procedure View Panel

The Procedure View panel contains the panel customization commands and the Procedure View tree. This panel displays all components in a procedure. You can add new components to a procedure, such as a Report, Define, Define Function, Chart, Set, Join, Use, and others.

If a component in the procedure is open, a green arrow appears next to the component icon.

When a new procedure is created, the Comment component opens automatically. In a previously created procedure that is reopened, the last report component or chart component opens automatically.

The Procedure View panel is available when you create or open a procedure or report. The Procedure View panel is shown in the following image.



For more information on customizing the Procedure View panel, see [Customizing WebFOCUS App Studio Panels](#) on page 132.

Displaying Components of a Procedure Using the Procedure View Tree

The Procedure View tree displays the components and folders associated with a procedure.

Open Folder Node

Displays different options depending on the selected component or components in the procedure.

Procedure Contents Tree

Shows the components in a procedure.

Defining the Components of a Procedure

A procedure is a .fex file that defines how data is retrieved and displayed. Procedures request data from the data source using a Master File to understand how the data is organized. When you run a procedure, it executes a series of commands that process your data and transform it into a readable output.

Procedures can consist of the following components:

- ☐ Report
- ☐ MAGNIFY Engine
- ☐ Engine
- ☐ SQL Report
- ☐ Define
- ☐ Define Function
- ☐ Chart
- ☐ SQL Chart
- ☐ Set
- ☐ Join
- ☐ Use
- ☐ Allocation
- ☐ Execute

- ❑ HtmlForm
- ❑ Include
- ❑ Olap Dimensions
- ❑ Match
- ❑ Other
- ❑ Dialogue Manager

You can add these components to new or existing procedures, and are responsible for the order in which you add them. For more information, see [Order of Components in the Procedure View Panel](#) on page 421. The following topics describe how these components modify a procedure.

Report

You can add a report to a procedure. In report mode, you can create and style simple or complex reports, add data to the Report canvas, and style that data creating a graphical representation of the report page. This allows you to view how the report displays at run time.

MAGNIFY Engine

The MAGNIFY Engine canvas contains the following ENGINE SET statements which are available for selection.

- ❑ **ACTION.** Possible values are *add* or *delete*. The add option is the default and inserts or updates a record. A record is updated if its WF_INDEX_UNIQUE_KEY value already exists in the index. The delete option finds the WF_INDEX_UNIQUE_KEY of the record value and deletes it from the index.
- ❑ **BASEURL.** The WebFOCUS Report base URL.
- ❑ **BATCHSIZE.** The number of records to burst at one time. It is recommended that the BATCHSIZE property is always used.
- ❑ **CONNECTION ATTRIBUTES.** The Magnify Indexing Servlet.
- ❑ **DATASOURCE.** The Magnify index library directory.
- ❑ **DELIMITER.** The separator for multiple categorizations. This is used in conjunction with aggregation-based alias names.

- ❑ **FEEDTYPE.** Possible values are *incremental* or *full*. The incremental option is the default and updates an existing record in the index or adds the data as a new record. This mode prevents duplicate records from being added to the index library. The full option adds all data to the index from the data source. If a record is repeated in the feed, it is duplicated in the Magnify index library.
- ❑ **MIME.** The document mime type, required for file indexing. Possible values are *text/plain* or *application/openurl*. The text/plain option is the default.

Engine

The Engine component exposes the WebFOCUS ENGINE SET statement and enables you to enter ENGINE commands or connection attributes, and override parameters.

Note: The Engine component is only used to create ENGINE statements. You are responsible for having the knowledge of the ENGINE SET command or the Connection Attribute needed.

SQL Report

The SQL Report component launches the SQL Report Wizard, where you can create a new SQL report, create an SQL report from an external .sql file, pass SQL commands to an RDBMS using SQL passthru, or import SQL commands from an existing .sql file.

Define

You can use the Define feature to create a virtual field as a component in a procedure.

Note: To enable the objects when creating a Define, click the *New* button.

A virtual field is evaluated on each retrieved record that passes any selection criteria on real fields. Define the virtual field by assigning a format and typing an expression, or composing it using the calculator fields and functions. The result of the expression is treated as though it were a real field stored in the data source.

Define Function

You are able to create your own functions by using the Define Function Wizard. The Define Function Wizard assists in the creation of a user function. The created functions can later be retrieved through the Function Arguments dialog box using the Retrieve User Functions button. By clicking *Retrieve User Functions*, your created functions will be available for use.

Chart

You can add a chart to a procedure. In chart mode, you can easily transform almost any type of data into effective, custom charts. You can create a variety of charts, such as bar charts, line charts, scatter charts, or pie charts to help users analyze data in a different way. You can include selection criteria by defining parameters for your data. Additionally, you can apply drill-down capabilities and conditional styling to highlight specific data on a chart.

The Chart canvas contains a ribbon of features and options that allow you to add and style the data in your chart. Contextual tabs open within the Chart canvas, rather than on the App Studio ribbon.

SQL Chart

The SQL Chart component launches the SQL Chart Wizard, where you can create a new SQL chart, create an SQL chart from an external .sql file, pass SQL commands to an RDBMS using SQL passthru, or import SQL commands from an existing .sql file.

Set

You can add the Set component to a procedure to select Environment Parameters and customize the procedures. The Set component controls the way that reports and charts appear on the screen or printer, the content of reports and charts, data retrieval characteristics that affect performance, and system responses to user requests. It also helps you set up your metadata and manipulate information, such as dates.

Join

If a report requires data from two or more related data sources, you can temporarily join the files and report from them as if they were one. Joined files remain physically separate, but are treated as one data source structure.

The Join component provides a graphical method for creating and manipulating all types of Joins. To create a Join you must specify a host data source, and then a cross-referenced data source. Both host and cross-referenced files are Master Files.

You create the Join as an component that is separate from any other component or procedure. You are responsible for placing the Join object in the correct position within your procedure, (that is, before a Define, Report, or Chart), and running it. The Join remains active for the entire session, unless you explicitly clear it.

Use

When you access a WebFOCUS data file, WebFOCUS searches for a Master File with the specified file name, and then searches for a data source with the same name. With the Use component, you can specify the name and location of a WebFOCUS data source.

You can apply the Use component to a procedure in App Studio when the default naming convention is not used, the data source cannot be found in the standard search path, or an explicit extra option is desired.

When you identify a WebFOCUS data source with the Use component, a Use directory is created, which is a list of data source definitions. When a Use directory is in effect, WebFOCUS locates a data source using the information in the directory instead of searching for it using the default name and search path. A Use directory enables you to access up to 1022 data sources and applies only to WebFOCUS data sources.

Allocation

For a file managed by the operating system, such as a comma-delimited data file, the physical file name is the actual name of a file as it appears to the operating system. A logical name is the shorthand name that points to a physical file name. Logical names simplify code by allowing short names to be used in place of the longer physical file name.

With the Allocation Wizard, you can create a FILEDEF command and generate platform independent file paths for all portable platforms by creating FILEDEF syntax with application names.

Execute

The Execute component allows one procedure to execute or call another procedure. The called procedure behaves as a completely separate procedure, with its own context. The Execute component allows you to view and select available procedures, supply values for parameters in the called procedure, and test the called procedure.

Once this procedure is specified, Execute displays these parameters and prompts you to provide values for them. You can provide values for all parameters in the procedure, or you can choose to provide values for only some of the parameters. If you provide values for only some of the parameters, you must provide values for the other parameters using another method. For example, values are passed from another part of the application. After providing parameter values, you can test the called procedure.

Execute is available from all development areas of the product.

HtmlForm

The HtmlForm component enables you to add HTML code to the active procedure. HTML forms are used to display HTML content. You can choose to reference or embed HTML forms in your procedure.

Note: HTML pages created in the HTML canvas are not meant to be used with an -HTMLFORM that uses run-time references. The HTML canvas cannot evaluate -HTMLFORM when run-time references to file names and objects are used.

Include

The Include component allows you to include a whole or partial procedure in another procedure. A partial procedure might contain heading text or syntax that should be included at run time based on a test in the calling procedure. It enables the reuse of code, making projects easier to write and maintain. After an included procedure runs, control returns to the calling procedure.

An Include component can be placed anywhere in a procedure.

Olap Dimensions

The OLAP Dimensions component allows you to create a temporary OLAP hierarchy and dimensions to build reports from, without modifying the Master File. Instead, you create a local hierarchy, where the information is stored in the active procedure. After you create the local hierarchy, you can build a report.

Match

The Match component launches the Match Wizard, where you can merge two or more data sources and specify which records to merge and which to sort out. The wizard creates a new data source (a HOLD file) which merges fields from the selected records. You can report from the new data source and use it as you would any other HOLD file. The merge process does not change the original data sources.

You select the records to be merged into the new data source by specifying sort fields in the Match Wizard. You specify one set of sort fields (using the BY phrase) for the first data source, and a second set of sort fields for the second data source. The Match Wizard compares all sort fields that have been specified in common for both data sources, and then merges all records from the first data source whose sort values match those in the second data source into the new HOLD file. You can specify up to 32 sort sets, which includes the number of common sort fields.

In addition to merging data source records that share values, you can merge records based on other relationships. For example, you can merge all records in each data source whose sort values are not matched in the other data source. Yet another type of merge combines all records from the first data source with any matching records from the second data source.

You can merge up to 16 sets of data in one Match request. For example, you can merge different data sources, or data from the same data source.

Note: The limit of 16 applies to the most complex request. Simpler requests may be able to merge more data sources.

Other

The Other component enables you to enter commands that connect other components. This feature is useful for writing code that does not have a graphical tool (such as Dialogue Manager). However, you can also use Other for any kind of manual coding, for example, to code a virtual field or a report. When used this way, the Other component automatically converts to the corresponding component type.

An Other component can be placed anywhere in a procedure.

Dialogue Manager

Dialogue Manager is the part of the WebFOCUS language that controls the execution of your application components. You can add flexibility to your application design by dynamically managing the flow of control in procedures using Dialogue Manager commands and variables whose values are supplied at run time.

You can select five different types of Dialogue Manager components to add to your procedure.

- ❑ **DM If.** Creates a Dialogue Manager IF statement by having you type an expression and choosing a label. You can choose to create an IF template if you want.
- ❑ **DM Goto.** Creates a Dialogue Manager GOTO statement by having you type a label.
- ❑ **DM Label.** Creates a Dialogue Manager label by having you type a label name.
- ❑ **DM Repeat.** Creates a Dialogue Manager REPEAT statement by having you choose labels, amper values, steps, times, and expressions. You can choose to create a REPEAT template if you want.
- ❑ **Dialogue Mngr.** Opens the Dialogue Manager canvas where you can manually create your Dialogue Manager code. For more information, see [Using Dialogue Manager](#) on page 436.

Order of Components in the Procedure View Panel

Components can be added to the Procedure View panel in any order. After adding a component you may need to change the order.

The order of components in the Procedure View panel can be significant. For example, suppose you have a report component and a define component, where the define component is a field used in the report. In this case, the define component must appear before (above) the report component in the Procedure View panel. Otherwise, the system will display a message when you try to run the report.

To move a component, click and drag it over another component until the target component is highlighted. As the component is moved, the pointer displays a box image. Release the mouse button and the moved component will appear after the highlighted component.

To copy a component, hold down the *Ctrl* key, click the component and drag it up or down. As the component is copied, the pointer displays a plus (+) sign. Release the mouse button and *Ctrl* key and the copied component will appear after the highlighted component.

Note: You can move or copy a component in the Procedure View panel even if the component is open in its respective canvas.

Creating Procedures and Procedure Components

This section describes how to create procedures and procedure components.

Procedure: How to Create a New Procedure

1. Create a new procedure by doing one of the following:
 - ☐ Click the *New* button on the Quick Access Toolbar. In the New dialog box, select *Procedure*, and click *OK*.
 - ☐ Click *New* from the Application menu. In the New dialog box, select *Procedure*, and then click *OK*.
 - ☐ In the Environments Tree panel, right-click a folder, point to *New*, and click *Procedure*.
2. The Procedure View panel opens.

Note: The *New* button is unavailable until you select a valid path. You do not need to enter a name to create a procedure. You can enter a name after the procedure has been created.

You can add components to your procedure in the Procedure View panel. Right-click the procedure folder or component that you want to add a new component after, point to *New*, and click the component name.

Procedure: How to Create a Report as a Component of a Procedure

1. Create a new procedure, or open an existing procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Report after, point to *New*, and click *Report*.

The Report Wizard - Select a Master File dialog box opens.

3. Select a Master File from the list and click *Finish*.

The Report canvas and the Procedure View Panel open.

4. Double-click fields in the Object Inspector to add them to the report.
5. Format your report by using the options on the Report tab, Format tab, Data tab, and Layout tab.

Tip: The Field tab appears when you select a data column on the Report canvas.

6. To save your report, click the Save button on the Quick Access Toolbar, or select Save or Save As from the Application menu.
7. To run your report, click the *Run* button on the Quick Access Toolbar, or select *Run* from the Application menu.

Procedure: How to Create an Engine Statement

1. From the Procedure View panel, right-click the procedure folder or the component that you want to create the Engine statement after, point to *New*, then click *Engine*.

The Engine canvas opens.

2. Select an Engine from the Engine list, or manually type in an Engine name.
3. Select an existing connection from the Connection list, or type a parameter statement in the *SET parameters* field.
4. Click the *Test* button to test the Engine statement.

Procedure: How to Create an SQL Report

1. From the Procedure View panel, right-click the procedure folder or the component that you want to create the SQL report after, point to *New*, then click *SQL Report*.

The Welcome to the WebFOCUS SQL Report Wizard window opens.

2. Depending on the type of SQL report you wish to create, follow the respective instructions in [Launching the Report Wizard](#) on page 243.

Procedure: How to Define a Virtual Field

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the virtual field after, point to *New*, and click *Define*.

The Open File dialog box opens.

3. Select a Master File from the list and click *OK*.

The Define canvas opens.

4. Type a name for the virtual field in the Define Field Name input box.
5. Click the *Format* button.

The Format dialog box opens.

6. Select the formatting options you want to apply to the virtual field and click *OK*.
7. Build an expression in the expression box. You can double-click fields from the Fields List to add them to the expression. Use the calculator buttons under the expressions window to provide numbers and operators in the expression.
8. Click the *Check* button to validate the generated code.

The Check dialog box opens displaying the component code and either an error message, or text stating that no error exists.

9. Click *OK* and close the Define canvas.

You can define multiple virtual fields for a procedure. After you define a virtual field, you can create a report that uses the virtual field. Right-click the *Define* component, point to *New*, and click *Report*.

Procedure: How to Create a User Define Function

To create a user define function:

1. Right-click a procedure component in the Procedure View panel, point to *New*, and click *Define Function*.

The Welcome to the Define Function Wizard window opens.

2. Click *Next*.

The Name dialog box opens.

3. Type a name and description for the function and click *Next*.

The Parameters dialog box opens.

4. Click the *Add new item* button to add new parameters to the function.

You can rename the parameters by double-clicking on the name column. For each parameter, clicking the ellipsis button in the Format column will open the Format dialog box, allowing you to edit the format of that parameter. Double-clicking in the Description column for each parameter will allow you to edit the description for parameter.

5. Click *Next*.

The Defined Fields dialog box opens. One defined field (with the same name as your function) is already entered.

Note: A function is comprised of expressions that returns a value to the caller of the function.

6. Click the *Add new item* button if you want to add more defined fields.

You can rename the fields by double-clicking on the name column. For each field, clicking the ellipsis button in the Format column will open the Format dialog box, allowing you to edit the format of that field. Clicking the ellipsis button in the Expression column will open a dialog box where you can edit what the function will do.

Note: The last defined field must have the same name as the function. This is why one defined field is already entered with the same name as the function. If multiple expressions are present, then the defined field with the same name as the function must be in the last position. If no defined field has the same name as the function, or if the defined field is not in the last position, you will be unable to progress to the next window.

7. Click *Next*.

The Define Function Wizard Complete window displays. The function, as well as its parameters and logic, are displayed before completion.

8. If you want to create more functions, click *New* to bring up the Define Function Wizard again, allowing you to create another function.

This can be done as many times as needed, allowing you to create multiple functions in the procedure, without having to exit and repeat certain steps.

Selecting a Define Function component and clicking *Open* will open the Define Function Wizard. Here, you can change any part of the already created function by going through each window.

Selecting a Define Function component and clicking *Delete* will delete the function.

Procedure: How to Create a Define Function Library

To create a define function library:

1. Right-click a Data Servers folder in the Environments tree panel, point to *New*, and click *Define Function Library*.

The Welcome to the Define Function Wizard window opens.

2. Click *Next*.

The Name dialog box opens.

3. Type a name and description for the function and click *Next*.

The Parameters dialog box opens.

4. Click the *Add new item* button to add new parameters to the function.

You can rename the parameters by double-clicking on the name column. For each parameter, clicking the ellipsis button in the Format column will open the Format dialog box, allowing you to edit the format of that parameter. Double-clicking in the Description column for each parameter will allow you to edit the description for parameter.

5. Click *Next*.

The Defined Fields dialog box opens. One defined field (with the same name as your function) is already entered.

Note: A function is comprised of expressions that returns a value to the caller of the function.

6. Click the *Add new item* button if you want to add more defined fields.

You can rename the fields by double-clicking on the name column. For each field, clicking the ellipsis button in the Format column will open the Format dialog box, allowing you to edit the format of that field. Clicking the ellipsis button in the Expression column will open a dialog box where you can edit what the function will do.

Note: The last defined field must have the same name as the function. This is why one defined field is already entered with the same name as the function. If multiple expressions are present, then the defined field with the same name as the function must be in the last position. If no defined field has the same name as the function, or if the defined field is not in the last position, you will be unable to progress to the next window.

7. Click *Next*.

The Define Function Wizard Complete window displays. The function, as well as its parameters and logic, are displayed before completion.

8. If you want to create more functions within the Define Function Library, click *New* and select *Define Function*, allowing you to create another function.

This can be done as many times as needed, allowing you to create multiple functions in the procedure, without having to exit and repeat certain steps.

Selecting a Define Function component and clicking *Delete* will delete the function within the Define Function Library.

Procedure: How to Create a Chart as a Component of a Procedure

1. Create a new procedure, or open an existing procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the chart after, point to *New*, and click *Chart*.

The Chart Wizard - Select a Master File dialog box opens.

3. Select a Master File from the list, and click *Finish*.

The Chart canvas opens.

4. Double-click fields in the Data Panel to add them to the chart.

You can use the features and functions on the ribbon that is located in the Chart canvas to format the chart.

5. To save your report, click the *Save* button on the App Studio Quick Access Toolbar, or select *Save* or *Save As* from the Application menu.
6. To run your report, click the *Run* button on the App Studio Quick Access Toolbar, or select *Run* from the Application menu.

Procedure: How to Create an SQL Chart

1. From the Procedure View panel, right-click the procedure folder or the component that you want to create the SQL chart after, point to *New*, then click *SQL Chart*.

The Welcome to the WebFOCUS SQL Chart Wizard window opens.

2. Depending on the type of SQL chart you wish to create, follow the respective instructions in [Launching the Chart Wizard](#) on page 405.

Procedure: How to Set Parameters for a Procedure

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Set after, point to *New*, and click *Set*.

The Set canvas opens.

3. From the Available Settings list, double-click a parameter.

The selected parameter is added to the Used Settings list. The available values for that parameter display in the Current Value list.

Note: You can also select a parameter and click the *Add* button to add it to the Used Settings list.

4. Select a value from the Current Value list.
5. Click the *Check* button to validate the generated code.

The Check dialog box opens displaying the component code and either an error message, or text stating that no error exists.

6. Click *OK*, and close the Set canvas.

This setting is now on, and will affect the way the procedure works.

Procedure: How to Join Data Sources

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Join after, point to *New* and click *Join*.

The Open File dialog box opens.

3. Select a Master File (host file) and click *OK*.

The Join canvas opens and displays the fields in the Master File.

4. On the *Join* tab, in the *Join* group, click *Add*.

You can also right-click the Join canvas and select *Add File*.

5. Select a Master File (cross-referenced file) and click *OK*.

The new Master File is added to the canvas. Common fields in both files are joined by a Join connector line.

6. Click *Save*.

7. Click *Run*.

A dialog box opens, displaying the component code, and either an error message or text stating that no error exists.

8. Click *OK* and close the Join canvas.

You can add another component to the procedure by right-clicking the *Join* component, pointing to *New*, and clicking the component. When you are prompted to select a Master File, select the same host file you used to create the Join component. This allows you to use the joined data sources.

Note: For more information on how to create each type of Join, see [Creating Joins Using Join Functionality](#) on page 288.

Procedure: How to Identify a Data Source With the Use Feature

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Use after, point to *New*, and click *Use*.

The Use canvas opens.

3. Select a USE action:

- ☐ *Clear/Replace current list of USE databases* clears all entries or replaces the current list of USE data source with those in the list box.
- ☐ *Append to the present database list* adds data sources to the current USE directory.
- ☐ *Replace only specified files in list* changes one or more data source assignments in the current USE directory.

4. In the Use canvas, do one of the following:
 - ☐ Type the name of a WebFOCUS data source in the Database Filename field.
 - ☐ Click *Browse* to search the network drives and directories for the file you want to add.
 - ☐ Type the Universal Naming Convention (UNC) name of the file in the Database Filename field. For example:

`\\Server1\\Disk1\\filename.ext`

The Universal Naming Convention (UNC) allows you to type the server name without entering the explicit path to the server. However, in order to take advantage of the UNC you must first attach to the server. For information on attaching to a server or mapping network drives, consult your Network Administrator.

Enter the Master File name to be associated with the data source in the MASTER File field.

5. If the data source is not located locally, type the name of the server on which the file resides, in the Database Server field.
6. Click *Add*.
7. Repeat steps 3 through 6 for any additional data sources you want to identify.
8. Click the *Check* button to validate the generated code.

The Check dialog box opens displaying the component code and either an error message, or text stating that no error exists.
9. Click *OK* and close the Use canvas.

Procedure: How to Define a Logical Name With the Allocation Wizard

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Allocation after, point to *New*, and click *Allocation*.

The Welcome to the Allocation Wizard window opens.

3. Click *Next* and specify the logical name for the allocation.

The name can be from one to eight characters. If you are identifying a data source, the name must be the same as the name of the Master File.

4. Click *Next* and select the device for the logical name.
 - ☐ *Disk* associates the logical name with a file. This is the default option.

- ☐ *Printer* associates the logical name with a printer.
- ☐ *Http* associates the logical name with a URL, by allocating the Master File to the result of running the URL.
- ☐ *Terminal* indicates that the keyboard and monitor are the input source and output destination for the file.
- ☐ *Clear* clears the allocation assigned to a file name.

5. Click *Next* to select additional options.

Note: The options vary depending on which device is selected. The steps below detail how the Allocation Wizard continues with the selected device.

Tip: At any time, you may click *Back* to go back and change the device, or any of the device settings.

6. When selecting Disk as the device:

- a. Select the application folder that contains the physical file.

Note: The application folders from the Reporting Server are shown by default and depend on the area from which the Allocation Wizard is invoked. Some examples of the Reporting Server application folders are Projects (if available), Data Servers, and Repository.

- b. Click *Next* and type the new file name.

or

Click the *Browse* button to display the Open dialog box and select from the list of existing files.

Note: The default file type is Data Files (*.dat). You may also select Temporary Files (*.ftm), and All Files (*.*), as the type of file.

- c. Click *Next* to specify additional options for the Disk device.

These additional options are:

- ☐ **Appends** records to the end of the file (without this option, the file is overwritten).

- ❑ **Fixed length records** indicates that you are assigning a logical name to a file with a fixed record length.
- ❑ **Record Size** specifies the record length of the file, when using the Fixed length records option.

d. Click *Next* to view the summary of the allocation settings you selected for the Disk device.

7. When selecting Printer as the device:

a. Select the application folder that contains the physical file.

Note: The application folders from the Reporting Server are shown by default and depend on the area from which the Allocation Wizard is invoked. Some examples of the Reporting Server application folders are Projects (if available), Data Servers, and Repository. You may specify a file in a directory that is not in the Reporting Server Application Path by using the Advanced option from the completed Allocation.

b. Click *Next* and enter the new file name.

or

Click the *Browse* button to display the Open dialog box and select from the list of existing files.

Note: The default file type is Data Files (*.dat). You may also select Temporary Files (*.ftm), and All Files (*.*), as the type of file.

c. Click *Next* to type the name of the printer.

d. Click *Next* to view the summary of the allocation settings you selected for the Printer device.

The following syntax is applied to the FILEDEF statement when using a Printer device:

```
FILEDEF OFFLINE PRINTER BASEAPP/TEMPOFFLINE.FTM (PRINTER
\\ibiprint\28C1
```

8. When selecting Http as the device:

a. Type the full URL path.

b. Click *Next* to view the summary of the allocation settings you selected for the Http device.

9. When selecting Terminal as the device:

a. Click *Next* to specify additional options for the Terminal device.

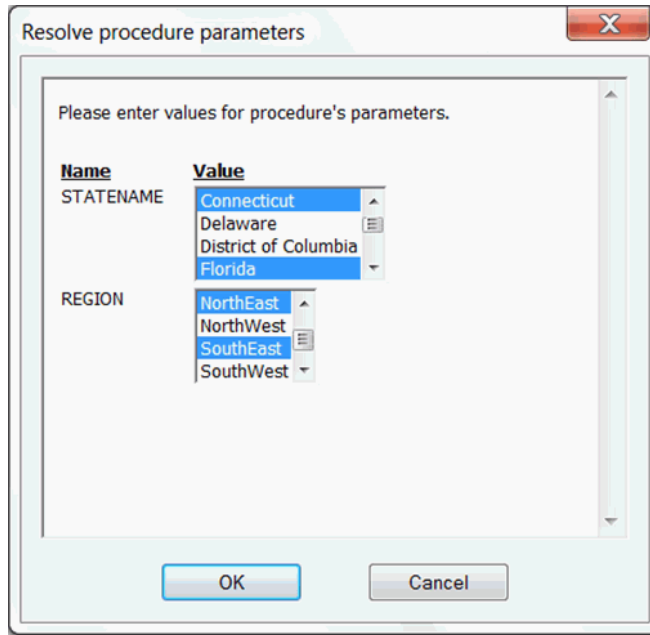
- ☐ You may choose to send the keyboard input to WebFOCUS as entered (lowercase or mixed-case). The default is mixed-case. Select this option to specify lowercase.
 - b.** Click *Next* to view the summary of the allocation settings you selected for the Terminal device.
- 10. When selecting *Clear* as the device:
 - a.** Click *Next* to view the summary of the allocation settings that you cleared.

Procedure: How to Call a Procedure From Another Procedure

In the following example, you will create two procedures, a report procedure and an Execute procedure. The first procedure, named *salesrep*, will contain a sales report with parameter prompts. The second procedure, called *svalues*, will contain the values for the parameters in *salesrep*, and will execute the called procedure, *salesrep*. The result will be a sales report with parameter values filled in.

1. Create a report called *salesrep*, with two multiselect parameter fields, for example, *State* and *Region* and two sum fields, for example, *Quantity Sold* and *Revenue*.
2. Create a procedure, called *svalues*. From the Procedure View, right-click *Comment*, point to *New*, and then click *Execute*.
3. From the Open File dialog box that displays, select the procedure to call, for example, *salesrep*.

The Resolve procedure parameters dialog box opens, as shown in the following image.



4. Select values for the Statename and Region parameters, for example, *Connecticut* and *Florida* for Statename and *NorthEast* and *SouthEast* for Region.
5. Click OK.

The code in the Execute canvas shows the Execute code, with the selected parameter values, as shown in the following image.

```

Execute x
1 EX IBFS:/WFC/Repository/localhost/salesrep.fex STATENAME='''Connecticut''' OR '''Florida''',
2 REGION='''NorthEast''' OR '''SouthEast'''
3

```

6. Run the svalues procedure.

The Sales Report displays, as show in the following image.

Sales Report			
Region	State	Quantity Sold	Revenue
NorthEast	Connecticut	1,931	1,146,626.05
SouthEast	Florida	5,868	3,588,318.06

Procedure: How to Create an OLAP Hierarchy

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the OLAP Hierarchy after, point to *New*, and click *OLAP Dimensions*.

The Open File dialog box opens.

3. Select a Master File to create the OLAP Hierarchy.
4. Click *OK*.

The Olap Dimensions canvas opens.

5. Drop fields from the left pane into the right pane, under Dimensions, to create your Hierarchy.

You can rename the fields listed directly under the Dimensions node by right-clicking a field and selecting *Rename*. To delete an unwanted field, right-click the field name and select *Delete*.

Procedure: How to Merge Data Sources Using the Match Wizard

1. Open an existing procedure, or create a new procedure.
2. In the Procedure View panel, right-click the procedure folder or the component that you want to create the Match after, point to *New*, and click *Match*.

The Open File dialog box opens.

3. Select a Master File to use first in the MATCH logical expression.
4. Click *OK*.

The Match Wizard opens in a new canvas. It uses typical wizard behavior in which you click a series of *Next* buttons to navigate from one window to the next. You can also use the Match Preview area to navigate the Match Wizard.

5. From the Available fields list, select the fields you want to use to build the Match request.

You can add a Match Alias (how the field appears in the HOLD file field list) and a Prefix Operator for each field.

Note: You can remove fields from this list by clicking the *Delete* button. If you add more than one field, you can also use the *Move Up* and *Move Down* buttons to rearrange the orders of the fields.

6. Select either *PRINT*, *SUM*, or *LIST* from the drop-down list.

7. To add a field as BY field, click a field in the Available Fields list and click the *Add field* button in the BY fields list box.

Note: You must have at least one BY field.

8. Click the *Where/If* tab if you want to create a WHERE expression or IF condition. This limits the records that are merged together.
9. Click the *Add WHERE expression* or *Add IF condition* button to open the Expression Builder. Use the Expression Builder to create the Where/If condition.

10. Click *Next*.

Step 3 of the Match Wizard opens.

11. Click the *Browse* button to select the data source you want to merge with the original data source.

The Open File dialog box opens.

12. Select a Master File and click *OK*.

13. Click *Next*.

Step 4 of the Match Wizard opens.

14. Add the fields for the second data source, including a Where/If field criteria if you want, as in step 5.

15. Click *Next*.

Step 5 of the Match Wizard opens.

16. Type a name for the HOLD file and select the type of MATCH phrase.

17. Click *Finish*.

The Match Wizard - Summary window opens, where you can review the final MATCH request.

Syntax: **How to Use -HTMLFORM Syntax**

-HTMLFORM sends report output to the HTML file you create for a webpage, and displays that page in the browser. The output can be saved as an HTML file that can be displayed later.

The syntax is:

```
-HTMLFORM filename [SAVE AS htmlpage]
```

or

```
-HTMLFORM BEGIN  
.  
.  
.  
-HTMLFORM END
```

where:

filename

Is the HTML file that contains placeholders for the report or reports that WebFOCUS creates with the command:

```
ON TABLE HOLD HTMTABLE AS report
```

SAVE

Indicates that the HTML page, created when the HTML file *filename* and the report or reports generated by WebFOCUS are combined, is to be saved.

AS *htmlpage*

Is the file name for the HTML page that is created when the HTML file *filename* and the report or reports generated by WebFOCUS are combined. This file is saved so that it can be displayed later.

```
-HTMLFORM BEGIN
```

Indicates the beginning of an inline HTML form in a procedure.

```
-HTMLFORM END
```

Indicates the end of an inline HTML form in a procedure.

Using Dialogue Manager

Dialogue Manager is the part of the WebFOCUS language that controls the execution of your application components and allows you to control the flow of your application with the use of commands and variables. You can dynamically control the execution of procedures, giving you flexibility in application design. Dialogue Manager also enables you to use variables in your procedures and supply values for them at run time.

The following are some of the ways you can use Dialogue Manager:

- ❑ **Customizing a procedure with variables.** You can dynamically change the execution of a procedure by including variables, or retrieve information from the system.
- ❑ **Navigating a procedure.** You can conditionally execute requests, repeat execution with program loops, or call another procedure.

- ❑ **Enhancing an HTML webpage.** You can increase the functionality of your webpage by including HTML commands in your procedure.
- ❑ **Issuing operating system commands.** You can issue an operating system command to set up an environment in which a request must run.
- ❑ **Controlling passwords.** You can directly assign and change passwords.
- ❑ **Sending a message to the application.** You can send a message to an application while a procedure is processing to explain the purpose of the procedure, display results, or present useful information.

You can create Dialogue Manager IFs, GOTOs, Labels, and REPEATs. You can also open the Dialogue Manager canvas and create any of the other items manually.

Dialogue Manager Variables Overview

You can write procedures containing variables with values that are unknown until run time, allowing a user to customize the procedure by supplying different values each time it executes. Variables fall into two categories:

- ❑ **Local and global variables.** Local and global variable values must be supplied at run time. Local variables retain the values only for one procedure. Global variables retain the values across procedures unless you explicitly clear them. You create a local variable by choosing a name that starts with a single ampersand (&) and you can create a global variable by choosing a name that starts with a double ampersand (&&).
- ❑ **System and statistical variables.** System and statistical variable values are automatically supplied by the system when a procedure references them. System and statistical variables have names that begin with a single ampersand (&). For example, the variable &LINES indicates how many lines of output were produced, and the variable &DATE indicates the current date.

Dialogue Manager Processing

You can modify your application at run time with user input and environment conditions by using Dialogue Manager stored procedures, which include commands and variables.

In App Studio, stored procedures are referred to as procedures.

1. Processing begins from the command processor when a procedure is invoked for execution.
2. The FOCEXEC Processor reads each line of the procedure. Any variables on the line are assigned the current values.
3. All Dialogue Manager commands execute as soon as Dialogue Manager reads them.

4. When a command line containing no Dialogue Manager commands is fully expanded with any variables resolved (through either a -SET command or prompting), it is placed onto the command execution stack.
5. Dialogue Manager execution commands and statistical variables route all currently stacked commands to the WebFOCUS Command Processor.

By the time your procedure is ready for execution, the following has happened:

- ❑ All variables have received values and these values have been integrated into the command lines containing variables.
- ❑ Dialogue Manager commands have been used to place WebFOCUS commands into proper sequential order for execution.
- ❑ At this point the WebFOCUS Command Processor no longer sees any Dialogue Manager commands. It only sees WebFOCUS command lines in the stack.

You can use the -TYPE command to send a message to the display while a procedure is processing. Typically, the message serves the following purposes:

- ❑ Explains the purpose of the procedure.
- ❑ Displays the results of a procedure or calculation during testing of a procedure.
- ❑ Presents other useful information.
- ❑ Indicates what type of information to supply in response to a prompt.

Navigating a Procedure

You can navigate a procedure in the following ways:

- ❑ **Unconditional branching.** Transfers control to a label.
- ❑ **Conditional branching.** Transfers control to a label depending on the outcome of a test.
- ❑ **Looping.** Performs a function repeatedly in your procedure.
- ❑ **Calling another procedure.** Incorporates a whole or partial procedure into your procedure.

Branching Unconditionally

You can perform unconditional branching, which transfers control to a label with the -GOTO command.

The first time through a procedure, Dialogue Manager notes the addresses of all the labels so they can be found immediately, if needed again. If Dialogue Manager has not stored the address of the label in the -GOTO command, it searches forward through the procedure for the target label. If no label is found, it begins searching at the top of the procedure.

Dialogue Manager takes no action on labels that do not have a corresponding -GOTO. If a -GOTO does not have a corresponding label, execution halts and a message is displayed.

Syntax: **How to Branch Unconditionally**

```
-GOTO label
.
.
.
-label [TYPE text]
```

where:

```
-label
```

Is a user-defined name of up to 12 characters. Do not use embedded blanks or the name of any other Dialogue Manager command. Do not use arithmetic or logical operations, words that can be confused with functions, or reserved words, such as CONTINUE.

The *label* text may precede or follow the -GOTO command in the procedure.

Note: When the *label* is specified in the -GOTO command, a dash does not precede it.

```
TYPE text
```

Sends a message to the display.

Example: **Branching Unconditionally**

The following example comments out all the WebFOCUS code using an unconditional branch, instead of the user typing -* in front of every line:

```
-GOTO DONE
TABLE FILE SALES
PRINT UNIT_SOLD RETURNS
BY PROD_CODE,CITY
END
-RUN
-DONE
```

Branching Conditionally

Conditional branching performs a test of the values of variables and, based on the test, transfers control to a label in the procedure with the -IF... GOTO command. This helps control the execution of requests and builds a dynamic procedure by choosing to execute or not execute parts of a procedure.

For example, you can check whether an extract file was created from a production data source. If the extract file exists, the program runs a set of reports against the extract. If it does not exist, the program branches around the reports and writes a message to a log file.

Note: Generally, a -IF test does not require that each test specify a target label. However, in a compound IF test, where a series of tests are nested within each other, a specified target label is required for each test.

Syntax: How to Branch Conditionally

```
-IF expression [THEN] {GOTO label1|CONTINUE} [ELSE IF...] [ELSE {GOTO  
label2|CONTINUE}] ;
```

where:

expression

Is a valid expression. Literals do not need to be enclosed in single quotation marks unless they contain embedded blanks or commas.

THEN

Is an optional word that increases readability of the command.

label1

Is a user-defined name of up to 12 characters to which to pass control if the -IF test is true. Do not use embedded blanks or the name of any other Dialogue Manager command. Do not use arithmetic or logical operations, words that can be confused with functions, or reserved words, such as CONTINUE.

The *label* text may precede or follow the -IF criteria in the procedure.

CONTINUE

Continues to the command that follows the semicolon (;) of the -IF command.

Note: CONTINUE cannot be used as a label in a -IF statement.

ELSE IF

Specifies a compound -IF test. The command -IF must end with a semicolon (;) to signal that all logic has been specified.

ELSE GOTO *label2*

Passes control to *label2* when the -IF test fails.

If a command spans more than one line, continuation lines must begin with a hyphen (-) and one or more spaces.

Example: Conditional Branching Based on User Input

In the following example, the first report request or the second report request, but not both, executes. Suppose that for the procedure to run a user must supply a value for a variable named &PROC. The user may enter SALES or EMPLOYEE.

```
1. -IF &PROC EQ 'EMPLOYEE' GOTO EMPLOYEE;
2. -SALES
   TABLE FILE SALES
   SUM UNIT_SOLD
   BY PROD_CODE
   END
3. -EXIT
   -EMPLOYEE
   TABLE FILE EMPLOYEE
   PRINT PLANT_NAME
   BY DEPARTMENT
   END
```

The procedure processes as follows:

1. The user enters the value SALES for &PROC. A -IF test is done, and since the value for &PROC is not EMPLOYEE, the test fails and control is passed to the next line, -SALES.
If the value for &PROC had been EMPLOYEE, control would pass to -EMPLOYEE.
2. The WebFOCUS code is processed, and stacked to be executed later.
3. -EXIT executes the stacked commands. The output is sent to the display and the procedure is terminated.

The request under the label -EMPLOYEE is not executed.

Looping in a Procedure

You can perform an action repeatedly by looping in your procedure with the `-REPEAT` command. Looping can be used for many tasks. For example, you can populate an indexed variable using a loop or use the output of a request in a second request.

A process loop can be executed a designated number of times or until a condition is met. A loop ends when any of the following occurs:

- ❑ It is executed in its entirety.
- ❑ A `-EXIT` command is issued.
- ❑ A `-GOTO` is issued to a label outside of the loop.

Note: If you issue another `-GOTO` later in the procedure to return to the loop, the loop proceeds from the point at which it left off.

Note that the `-SET` command provides another method for implementing loops.

Tip: During loop processing, the search for labels that indicate the target of a `-REPEAT` or a `-GOTO` command takes longer in a procedure with variable, rather than fixed (80 character), record lengths. To speed execution in this situation, consider replacing loops with `EX` or `-INCLUDE` commands.

Syntax: How to Specify a Loop

```
-REPEAT label n TIMES
```

or

```
-REPEAT label WHILE condition;
```

or

```
-REPEAT label FOR &variable [FROM fromval] [TO toval] [STEP s]
```

where:

label

Identifies the code to be repeated (the loop). A label can include another loop if the label for the second loop has a different name than the first.

n TIMES

Specifies the number of times to execute the loop. The value of *n* can be a local variable, a global variable, or a constant. If it is a variable, it is evaluated only once, so you cannot change the number of times to execute the loop. The loop can only be ended early using -EXIT.

WHILE condition;

Specifies the condition under which to execute the loop. The condition is any logical expression that can be true or false. The loop executes if the condition is true.

Note: The condition must be followed by a semicolon (;).

&variable

Is a variable that is tested at the start of each execution of the loop and incremented by *s* with each execution. It is compared with the value of *fromval* and *toval*, if supplied. The loop is executed only if *&variable* is greater than or equal to *fromval* or less than or equal to *toval*.

fromval

Is a constant that is compared with *&variable* at the start of the execution of the loop. The default value is 1.

toval

Is a value that is compared with *&variable* at the start of the execution of the loop. The default value is 1,000,000.

STEP s

Is a constant used to increment *&variable* at the end of the execution of the loop. It may be positive or negative. The default increment is 1.

Note: The parameters FROM, TO, and STEP can appear in any order.

Example: Repeating a Loop

These examples illustrate each syntactical element of -REPEAT.

```
-REPEAT label n TIMES
```

For example:

```
-REPEAT LAB1 2 TIMES
-TYPE INSIDE
-LAB1 TYPE OUTSIDE
```

The output is:

```
INSIDE  
INSIDE  
OUTSIDE
```

```
-REPEAT label WHILE condition;
```

For example:

```
-SET &A = 1;  
-REPEAT LABEL WHILE &A LE 2;  
-TYPE &A  
-SET &A = &A + 1;  
-LABEL TYPE END: &A
```

The output is:

```
1  
2  
END: 3
```

```
-REPEAT label FOR &variable FROM fromval TO toval STEP s
```

For example:

```
-REPEAT LABEL FOR &A STEP 2 TO 4  
-TYPE INSIDE &A  
-LABEL TYPE OUTSIDE &A
```

The output is:

```
INSIDE 1  
INSIDE 3  
OUTSIDE 5
```

Using Variables in a Procedure

Using interactive variable substitution, you can create procedures that include variables (also called amper variables) and supply values for them at run time. These variables store a string of text or numbers and can be placed anywhere in a procedure. For example, a variable can refer to a field, a command, descriptive text, or a file name.

Note: A Dialogue Manager variable contains only alphanumeric data. If a function or expression returns a numeric value to a Dialogue Manager variable, the value is truncated to an integer and converted to alphanumeric format before being stored in the variable, unless you specify the precision to use.

Variables fall into two categories:

- ❑ Local and global variables have values supplied at run time. Local variable values remain in effect for the respective procedure, while global variable values remain in effect for all procedures executed during an entire session.

Leading double ampersands (&&) denote global variables. All other Dialogue Manager variables begin with a single ampersand (&). For this reason, they are known as amper variables.

- ❑ System, statistical, and special variables have values that the system automatically resolves whenever you request them.

The maximum number of local, global, system, statistical, special, and index variables available in a procedure is 1024. Approximately 40 are reserved for use by WebFOCUS.

Variables can be used only in procedures. They are ignored if you use them while creating reports live at the display.

You can query the values of each type of variable you use.

The values for variables may be supplied in a variety of ways.

Reference: Naming Conventions for Local and Global Variables

Local and global variable names are user-defined, while system and statistical variables have predefined names. The following rules apply to the naming of local and global variables:

- ❑ A local variable name is always preceded by an ampersand (&). The variable can be named or positional.
A positional variable consists of a single ampersand (&) followed by a numeric string (for example, &1). The value of a positional variable is passed to a procedure when it is executed.
- ❑ A global variable name is always preceded by a double ampersand (&&).
- ❑ A variable name can consist of up to 100 characters.
- ❑ Embedded blanks are not permitted in a variable name.
- ❑ If a value for a variable might contain an embedded blank, comma, or equal sign, enclose the variable in single quotation marks when referred to.
- ❑ A variable name may be any combination of the characters A through Z, 0 through 9, and the underscore (_). The first character of the name should be a letter.
- ❑ You can assign a number instead of a name to a variable to create a positional variable.

- ❑ The underscore may be included in a variable name, but the following special characters are not permitted: plus sign (+), minus sign (-), asterisk (*), slash (/), period (.), ampersand (&), and semicolon (;).

Syntax: **How to Specify a Variable Name**

&[&]name

where:

&

Denotes a local variable. A single ampersand (&) followed by a numeric string denotes a positional variable.

&&

Denotes a global variable.

name

Is the variable name. The name you assign must follow the rules outlined for Dialogue Manager.

Local Variables

Local variables are identified by a single ampersand (&) preceding the name of the variable. They remain in effect throughout a single procedure.

Example: **Using Local Variables**

Consider the following procedure, SALESREPORT, in which &CITY, &CODE1, and &CODE2 are local variables:

```
TABLE FILE SALES
HEADING CENTER
"MONTHLY REPORT FOR &CITY"
"PRODUCT CODES FROM &CODE1 TO &CODE2"
" "
SUM UNIT_SOLD AND RETURNS AND COMPUTE
RATIO/D5.2 = 100 * (RETURNS/UNIT_SOLD);
BY CITY
IF CITY EQ &CITY
BY PROD_CODE
IF PROD_CODE IS-FROM &CODE1 TO &CODE2
END
```

Assume you supply the following values when you call the procedure:

```
EX SLRPT CITY = STAMFORD, CODE1=B10, CODE2=B20
```

Dialogue Manager substitutes the values for the variables as follows:

```
TABLE FILE SALES
HEADING CENTER
"MONTHLY REPORT FOR STAMFORD"
"PRODUCT CODES FROM B10 TO B20"
" "
SUM UNIT_SOLD AND RETURNS AND COMPUTE
RATIO/D5.2 = 100 * (RETURNS/UNIT_SOLD);
BY CITY
IF CITY EQ STAMFORD
BY PROD_CODE
IF PROD_CODE IS-FROM B10 TO B20
END
```

After the procedure executes and terminates, the values STAMFORD, B10, and B20 are lost.

Global Variables

Global variables differ from local variables in that once a value is supplied, it remains current throughout the WebFOCUS session unless set to another value with -SET or cleared by the LET CLEAR command. Global variables are useful for gathering values at the start of a work session for use by several subsequent procedures. All procedures that use a particular global variable receive the current value until you exit from WebFOCUS.

Global variables are specified through the use of a double ampersand (&&) preceding the variable name. It is possible to have a local and global variable with the same name. They are distinct and may have different values.

Example: Using Global Variables

The following example illustrates the use of three global variables: &&CITY, &&CODE1, &&CODE2. The values are substituted in the first procedure, PROC1, and the values are retained and passed to the second procedure, PROC2.

```
TABLE FILE SALES
HEADING CENTER
"MONTHLY REPORT FOR &&CITY"
SUM UNIT_SOLD AND RETURNS AND COMPUTE
RATIO/D5.2 = 100 * (RETURNS/UNIT_SOLD);
BY CITY
IF CITY EQ &&CITY
BY PROD_CODE
IF PROD_CODE IS-FROM &&CODE1 TO &&CODE2
END
EX PROC2

TABLE FILE SALES
HEADING CENTER
"MONTHLY REPORT FOR &&CITY AND PRODUCT &&CODE1"
PRINT UNIT_SOLD AND RETURNS AND COMPUTE
RATIO/D5.2 = 100 * (RETURNS/UNIT_SOLD);
BY CITY
IF CITY EQ &&CITY
IF PROD_CODE EQ &&CODE1
END
```

Querying the Values of Variables and Parameters

Two Dialogue Manager commands enable you to:

- ☐ Display the values of all types of local, global, and system variables.
- ☐ Store the value of a parameter in a variable. The stored value can then be queried with the ? SET command.

In addition, you can issue two QUERY (?) commands to display the values of:

- ☐ **Global variables.** Since global variable values remain current throughout the WebFOCUS session, it is helpful to be able to display the values on demand. The syntax is:

```
? &&
```
- ☐ **Statistics stored in variables.** You can query the current value of all statistical variables (except &FOCDISORG and &FOCERRNUM). The syntax is:

```
? STAT
```

Syntax: How to Display the Value of a Variable

You can query all Dialogue Manager variables (local, global, system, and statistical) from a stored procedure. The syntax is:

```
-? [&variablename]
```

where:

&

Issued alone, displays variables of all types.

variablename

Is a complete amper variable or a partial string of up to 12 characters. Only amper variables starting with the specified string are displayed.

The command displays the following message, followed by a list of currently defined amper variables and the values:

```
CURRENTLY DEFINED & VARIABLES:
```

Since local variables do not exist outside a procedure, no similar query is available from the WebFOCUS command line.

Displaying Data Sources in an Application Folder Using the Use Qualified Path Command

The Use Qualified Path Command is available when creating content.

You can select the *Use Qualified Path* check box to only display data sources in the selected application folder. When the *Use Qualified Path* check box is unselected, all data sources in the application path are displayed.

When creating content or adding components to a procedure, selecting the *Use Qualified Path* check box will display an application folder selection area and a data source selection area. When the *Use Qualified Path* check box is unselected, only a data source selection area is displayed.

Procedure components that use a mix of qualified and non-qualified paths for the same data source will not work together. For example, the components that use the qualified path of a data source will work together and the components that use the non-qualified path of the same data source will work together.

If you want all components to work together, then all components need to either use the qualified path of a data source, or all components need to use the non-qualified path of a data source.

Creating Visualizations in WebFOCUS App Studio

In App Studio, you can create and build visualizations. Visualizations centralize information by providing different views of data that are pertinent to a particular objective (for example, reviewing trends or fluctuations in data over a period of time or within a region).


A visualization provides you with a quick glance of information on a single screen. Visualizations support the use of different types of charts, maps, and grids. For example, you may want to use a bar, pie, and line chart to show different views of the same data. Alternatively, you may want to offset a particular visual by showing other types of related data that employ a different type of visual. You can also add a text cell to your visualization to provide explanatory text or information that other users can reference. Visualizations allow you to monitor changes in data. They also serve to provide information in real-time, based on changes in underlying data or other components. A visualization can be updated, changed, or revised at any time to account for shifts in data needs.

In this chapter:

- ❑ [Creating Visualizations](#)

Creating Visualizations

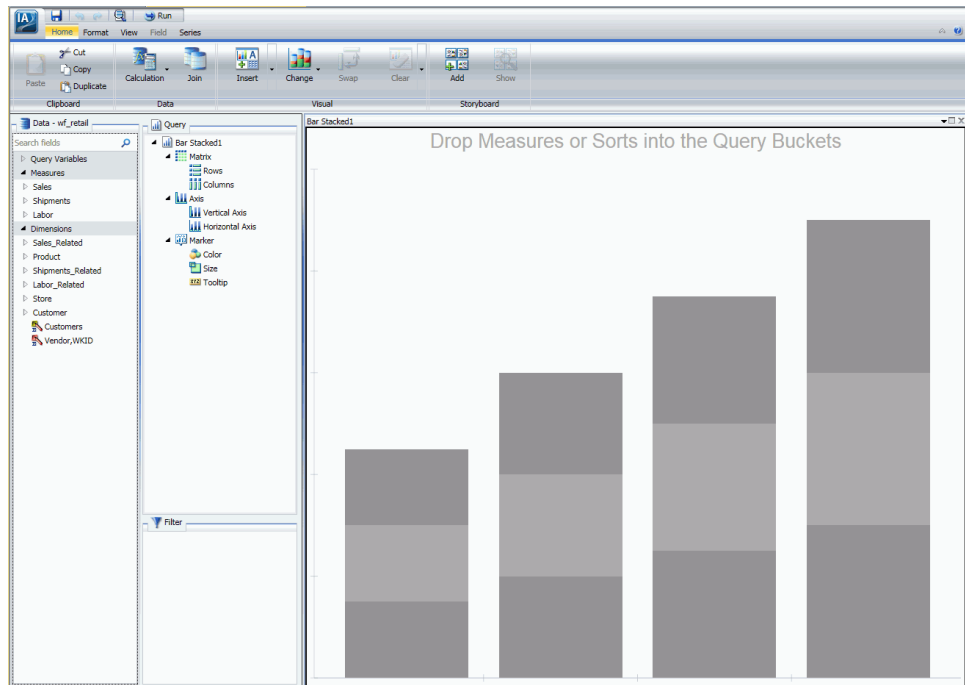
You can create visualizations from the Content node in the Environments Tree panel or Environments Detail panel.

To access the online Help for visualizations, click the *Help* icon , located in the upper-right corner of the canvas.

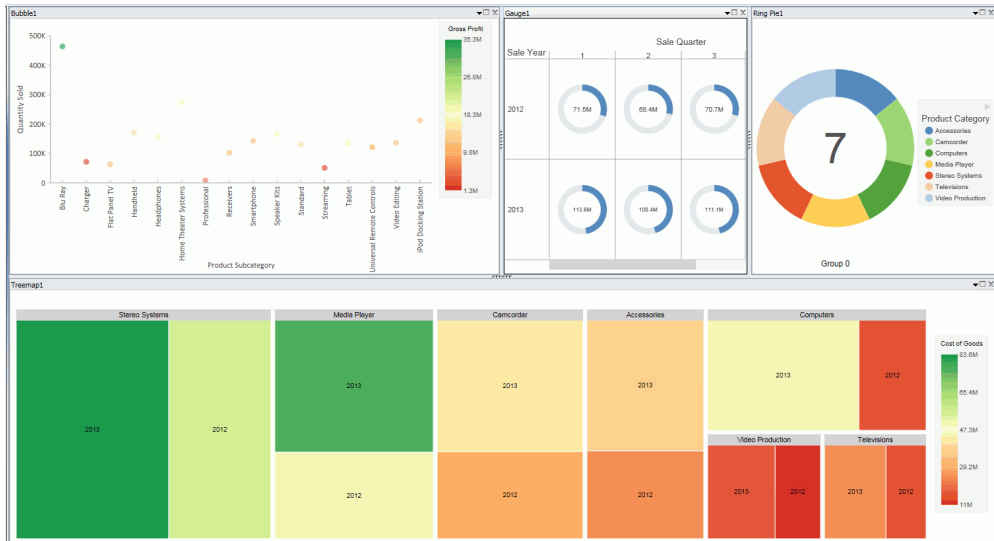
Procedure: How to Create a New Visualization

1. From the Content node in the Environments Tree panel or Environments Detail panel, right-click a folder, point to *New*, and click *Visualization*.
2. Select a Master File from the list and click *Open*.

The WebFOCUS InfoAssist interface opens, as shown in the following image, where you can create charts, maps, and grids to visually represent your data.



The following image shows a visualization that contains multiple visuals, including a bubble, gauge, ring pie, and treemap.



Note: For more information on creating visualizations, see the *InfoAssist User's Manual*.

Creating HTML Pages in WebFOCUS App Studio

In App Studio, you can create and edit HTML pages using the HTML canvas. When you create a new HTML page, you use the HTML/Document Wizard.

This topic describes how to launch the HTML/Document Wizard to create HTML pages. It also identifies and explains the tabs and panels that are available when you are developing HTML pages in the HTML canvas.

In this chapter:

- ❑ [Launching the HTML/Document Wizard](#)
- ❑ [Accessing HTML Page Components With the App Studio Ribbon](#)
- ❑ [Using Parameters](#)
- ❑ [Viewing the Attributes of HTML Objects Using the Properties Panel](#)
- ❑ [Modifying the Population Settings for an HTML Object Using the Settings Panel](#)
- ❑ [Submitting Tasks Using the Tasks & Animations Panel](#)
- ❑ [Working With the Requests & Data Sources Panel](#)
- ❑ [Specifying Browser Defaults With the Style Composer](#)
- ❑ [Chaining in the HTML Canvas](#)
- ❑ [Using JavaScript Code With HTML Canvas Pages](#)
- ❑ [Creating Responsive Web Pages](#)
- ❑ [Designing Content for Smartphones](#)
- ❑ [Cascading Style Sheet Support Matrix for Internet Explorer](#)
- ❑ [Cascading Style Sheet Class Mapping List](#)

Launching the HTML/Document Wizard

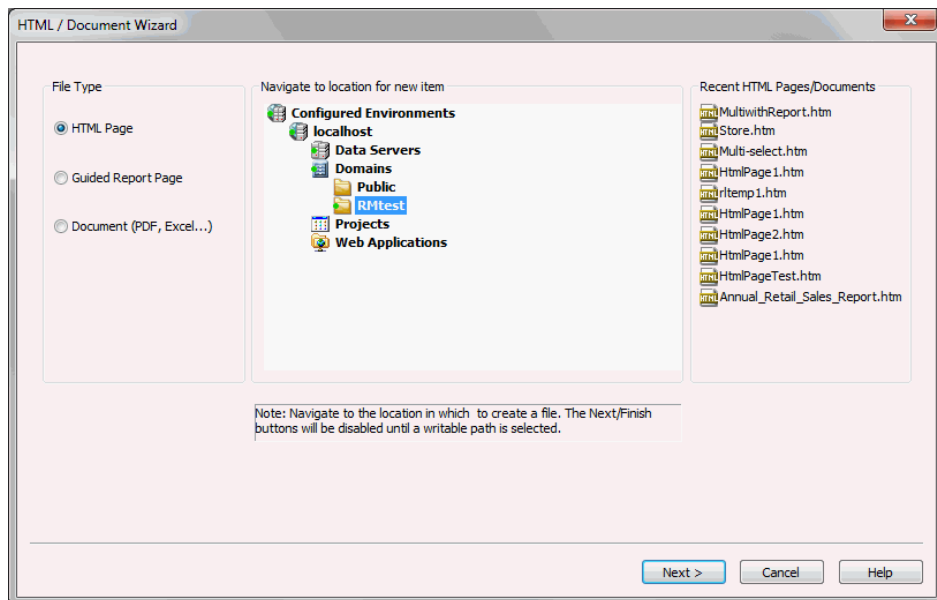
The HTML/Document Wizard allows you to create a new HTML Page, Guided Report Page, or Document, and open a recent procedure.

To open the HTML/Document Wizard:

- ❑ On the Home tab, in the Content group, click *HTML/Document*.
- ❑ In the Environments Tree panel, right-click an application folder, point to *New*, and click *HTML/Document*.

Note: If you choose to create a new HTML page using the shortcut menu in the Environments Tree panel, your screen will not include a Navigator panel since the location for your HTML page is already selected.

The HTML/Document Wizard opens, as shown in the following image.



From the HTML/Document Wizard, you can open a recent HTML Page/Document or create a new one.

Procedure: How to Create an HTML Page Using the HTML/Document Wizard

After you have launched the HTML/Document Wizard, you can begin to create your HTML Page.

1. In the File Type area, select *HTML Page*.
2. Navigate to where you want to create the new procedure or select a recent procedure.

Note: If you used the shortcut menu in the Environments Tree panel to create your HTML page, a location is already selected.

3. Optionally, click *Next* if you want to add themes and settings to your HTML page.
4. Click *Finish*.

Note: The Finish button is unavailable until you select a valid path.

The HTML canvas, File/Folder Properties panel, Properties panel, Settings panel, Requests & Data sources panel, and Tasks & Animations panel open. You can now add data to your HTML page and format the data using the tabs in the ribbon.

5. To save your HTML page, click the Save button on the Quick Access Toolbar or select Save from the Application menu.
6. To run your HTML page, click *Run* on the Quick Access Toolbar or click *Run* from the Application menu.

Procedure: How to Create a Guided Report Page Using the HTML/Document Wizard

After you have launched the HTML/Document Wizard, you can begin to create your own Guided Report page.

1. In the File Type area, select *Guided Report Page*.
2. Navigate to where you want to create the new procedure or select a recent procedure.

Note: If you used the shortcut menu in the Environments Tree panel to create your Guided Report page, a location is already selected.

3. Optionally, click *Next* if you want to add themes and settings to your Guided Report page.
4. Click *Finish*.

Note: The Finish button is unavailable until you select a valid path.

The HTML canvas, File/Folder Properties panel, Properties panel, Settings panel, Requests & Data sources panel, and Tasks & Animations panel open. You can now add data to your HTML page and format the data using the tabs in the ribbon.

5. To save your Guided Report page, click the Save button on the Quick Access Toolbar or select Save from the Application menu.
6. To run your Guided Report page, click *Run* on the Quick Access Toolbar or click *Run* from the Application menu.

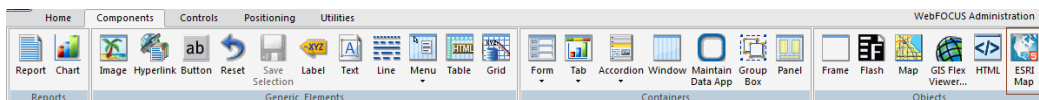
Accessing HTML Page Components With the App Studio Ribbon

The following topics describe the tabs and panels that are available when you are developing HTML pages in the HTML canvas.

Inserting Components in an HTML Page Using the Components Tab

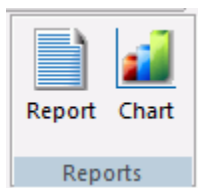
You can add a variety of components to an HTML page using the command groups in the Components tab.

The Components tab contains the Reports, Generic Elements, Containers, and Objects groups, as shown in the following image.



Inserting a Report or Chart in an HTML Page Using the Reports Group

From the Reports group, you can add a report or chart to your HTML page. The Reports group is shown in the following image.



The commands in the Reports group are:

Report

Inserts a report object. You can add reports to the HTML canvas that will display when you run the layout. You can either embed or reference reports. Double-clicking a blank report object opens the Report canvas where you can create and style a report to be used in the HTML page.

You can also include parameters in a report whose values can be assigned with controls that are added with the HTML canvas.

Chart

Inserts a chart object. You can add charts to the HTML canvas that will display when you run the layout. You can either embed or reference charts. Double-clicking on a blank chart object will open the Chart canvas where you can create and style a chart to be used in the HTML canvas.

Procedure: How to Add a New Report or Chart to an HTML Page

1. Insert a report or chart object by doing one of the following:
 - ☐ On the Components tab, in the Reports group, click the *Report* or *Chart*.
 - ☐ Right-click in the layout and select *New Report* or *New Chart* from the shortcut menu.

The pointer changes into a crosshair.
2. Drag the crosshair to create a report or chart object and adjust it to the size that you want.

A report or chart object is created in the layout and assigned the name *report(n)* or *chart(n)*, where *n* is a number. The object will appear in gray and white to indicate that the placeholder does not have a report or chart associated with it. Once a report or chart is associated with the object, the object displays the contents of the report or chart if live or simulated data is active (live data is the default) or a colored placeholder if preview is off in the HTML Page tab, located in the App Studio Options dialog box.
3. Create a report or chart by doing one of the following:
 - ☐ Double-click the placeholder.
 - or
 - ☐ Right-click the placeholder and select *New Report* for a report, or *New Chart* for a chart.

The Open File dialog box appears.
4. Select the Master File you want to use and click *OK*.

The Report canvas opens for reports and the Chart canvas opens for charts.
5. Optionally, after creating the report or chart, you can change its properties by adjusting the properties displayed in the Properties panel.

Procedure: How to Add an Existing Report or Chart to a Layout

1. Insert a report or chart object by doing one of the following:
 - ☐ On the Components tab, in the Reports group, click *Report* or *Chart*.

The pointer changes into a crosshair. Drag the crosshair to create a report or chart object and adjust it to the size you want.

A report or chart object is created in the layout and assigned the name *report(n)* or *chart(n)*, where *n* is a number. The object will appear in gray and white to indicate that the placeholder does not have a report or chart associated with it. Once a report or chart is associated with the object, the object displays the contents of the report or chart if live or simulated data is active (live data is the default) or a colored placeholder if preview is off in the HTML Page tab, located in the App Studio Options dialog box.

- ☐ Right-click in the layout and select *New Report* or *New Chart* from the shortcut menu.
- 2. Right-click the report or chart.
 - ☐ Select *Reference existing procedure*.
 - ☐ For a report, right-click the report object and select *Import existing report*.
 - ☐ For a chart, right-click the chart object and select *Import existing chart*.

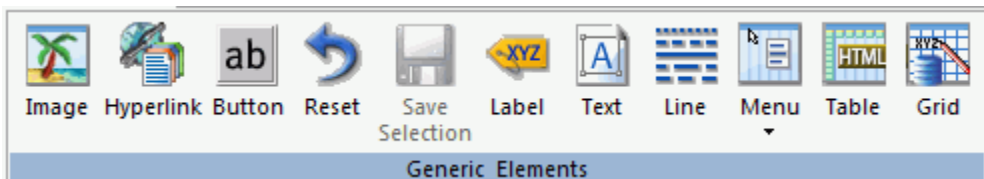
The Open File dialog box appears.

- 3. Enter the name of the procedure you want to add to the layout.
- 4. Click *OK*.

The report or chart object appears in the Design view of the HTML canvas.

Adding Basic Elements to an HTML Page Using the Generic Elements Group

You can add a variety of basic elements. The Generic Elements group is shown in the following image.



The commands in the Generic Elements group are:

Image

Inserts an image. You can add an image to the layout. This is useful for including graphics, such as a company logo.

You can insert an image into your report layout and add a hyperlink. After you run your report and click the image, you can launch a URL or run a report the same way by clicking a hyperlink or push button.

Note: When inserting images, images must be referenced from a specific directory location.

Hyperlink

Inserts a hyperlink.

Button

Inserts a button. A push button enables you to execute a report or link to a URL or HTML file. This behavior is similar to a hyperlink.

Reset

Inserts a reset button. A reset button enables you to revert the entire page back to its initial settings.

Save Selection

Inserts a save selection button. This component is available only when you are using Managed Reporting.

Label

Inserts a label. A label is simply a piece of text. The label component enables you to create and name a label, and link it to a control by assigning the label HTML for property the same value as the Unique Identifier property for the control.

Text

Inserts a text box. You can add text to the layout. This is useful for including headings for your webpage, or adding directions or explanations for your report or chart.

Line

Inserts a line. You can add a horizontal or vertical line to the layout. This is useful for distinguishing between sections of your launch or display page.

Menu

Inserts a menu. You can add a horizontal or vertical menu to the layout. This component can be used with Maintain code.

Table

Inserts a table. This component can be used with Maintain code.

Grid

Inserts a grid.

Procedure: How to Format Text in an HTML Page

You may apply various formatting and style options to words and individual text characters within the text object.

Note: Any formatting and styling that you have applied to individual text strings within the text object will remain unchanged. Changes made to the entire text object are only applied to part of the text string that has not been formatted.

1. On the Components tab, in the Generic Elements group, click *Text*.
The pointer changes to a crosshair.
 2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
 3. Select the text that you wish to format:
 - ☐ To format the entire text object, single-click the text object in the layout.
 - ☐ To format an individual word or text character, highlight part of the text within the text object.
 4. Right-click the text, point to *Style*, and then click *Font*.
The Style Composer dialog box opens with Font selected automatically.

Note: You can also access font formatting options in the Properties panel.
 5. Select from the formatting options available. You can change the type, style, color, size, and effect of the font.

Note: When you enter a *Specific* font size, the unit defaults to px (pixels).
 6. Click *OK* to close the Style Composer dialog box.
- The formatting options that you selected are applied to the text.

Procedure: How to Insert a Bulleted List or Numbered List Into a Text Element

To insert a bulleted list or numbered list into a text object:

1. On the Components tab, in the Generic Elements group, click *Text*.
The pointer changes to a crosshair.
2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
3. Add multiple lines of text to the text object.
4. Highlight and right-click the text that you want to include in the list.
5. In the shortcut menu, select one of the following list options:

- ☐ **Bullets**

- ☐ Disc
- ☐ Circle
- ☐ Square

- ☐ **Numbering**

- ☐ Numbers
- ☐ Lowercase Letters
- ☐ Uppercase Letters
- ☐ Small Roman numerals
- ☐ Large Roman numerals

Note:

- ☐ Alternatively, you can select a bullet type before typing text to begin the list. Pressing enter will begin the next item in the list on a separate line.
- ☐ To change the bullet or number list type of an existing list, place your pointer on the list level you want to change and reselect a bullet or number list type. Selecting *None* will remove the bullets or numbers for that level and move any nested lists up one level. In order to switch between bullets and numbers, you must first remove the current list option by selecting *None* and then applying the list option you want.

Procedure: How to Insert Nested Lists Into a Text Element

To insert a nested list into the text object:

1. On the Components tab, in the Generic Elements group, click *Text*.
The pointer changes to a crosshair.
2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
3. Add a list to the text object. For more information, see [How to Insert a Bulleted List or Numbered List Into a Text Element](#) on page 463.
4. Place your pointer after a list item.
5. Right-click, point to *Nested List* and then select a bulleted or numbered list option.
A list is started within the current list, allowing you to enter text on that list level.

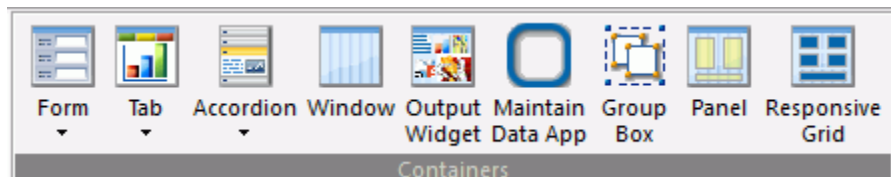
Note: Pressing Tab while your pointer is on the same line as a list item will move that item one level down, resulting in a nested list. The bullet or number type selected is the next list type in the right-click shortcut menu. For example, if you have a bulleted list that uses the disc bullet type, pressing Tab to move an item down one level will cause that nested list to have the circle bullet type.

You can continue to nest lists within other lists by using the same steps shown above.

Note: You cannot skip a list level. For example, in order to insert a nested bulleted list or nested numbered list on a lower level, there must be a list one level up from it.

Adding Containers to an HTML Page Using the Containers Group

You can add specific containers that group objects together on an HTML page. The Containers group is shown in the following image.



The commands in the Containers group are:

Form

Inserts either a multi-layer form or single-layer form.

Tab

Inserts a tab control. Tab controls enable you to create multiple pages in one HTML form and present a better display for viewing secondary information. You can select Top, Bottom, Left, or Right. This means you can choose to add a tab control that displays tabs at the top, bottom, left, or right on the control.

You can drag and resize this object, at run time, if the Enable dragging and Enable resizing properties, in the Properties panel, are set to Yes.

When a tab control object is added to the layout, each tab control consists of:

- ☐ A tab item.

A tab item is the tab label. You may edit the name of the tab item, style the tab item, and add multiple tab items. Each tab item is associated with a tab body.

- ☐ A tab body.

A tab body is the tab page where you associate your components, such as report and graph objects, images, and lines.

The Tab control can be displayed as a full screen or part of an HTML page.

Accordion

Inserts an Accordion styled box. You can drag and resize this object, at run time, if the Enable dragging and Enable resizing properties, in the Properties panel, are set to Yes.

Window

Inserts a window. You can drag and resize this object, at run time, if the Enable dragging and Enable resizing properties, in the Properties panel, are set to Yes.

Output Widget

Inserts an output widget. The output widget container includes buttons in the widget title bar that let you display or hide filter controls and that let you maximize to display full-screen, and minimize to return it to its original size.

Maintain Data App

Inserts a Maintain Data app window. You can drag and resize this object, at run time, if the Enable dragging and Enable resizing properties, in the Properties panel, are set to Yes.

Group Box

Inserts a group box. A group box can be used to create a border around a group of objects, for example, forms or reports and charts.

Panel

Inserts a panel to group objects together. The panel is invisible at run time.

Responsive Grid

When Responsive Design is enabled, this inserts responsive panels grouped together in a grid. Right-click the grid and select *Responsive grid configuration* to open the Responsive grid configuration dialog. Use this to determine the number of rows in the grid, and the number of panels per row.

Procedure: How to Add Additional Tabs

1. Select the tab control object in the layout.
2. Right-click and select *Add Page* from the shortcut menu.
A tab is added to the tab control object.
3. To align multiple tab items, select the tab control object and click *Auto Arrange* from the shortcut menu,
The tab items are resized to the size of the widest tab item and they are evenly spaced.

Procedure: How to Enable Full Screen Mode for the Tab Control

You may resize the tab control to fit the full screen of your layout, making the tab control the full background of your window at run time. When set to full screen mode, scroll bars will not be applied to the output window. Therefore, you may have to adjust the tab control (and any items on the tab) in the layout to ensure that they appear appropriately for display at run time.

Note: It is recommended to set the tab control to full screen mode at the beginning of the development process. If there are existing components on the layout that are not part of the tab control, these components will become inaccessible if the tab control is changed to full screen mode.

1. From the Containers group, click *Tab*.
The pointer changes into a crosshair.
2. Drag the crosshair in the layout to create the tab control object.

3. In the Properties panel, Autosize Children Enable property select Yes, right-click the canvas, and click *Update Layout*.

The tab control displays as a full screen in the layout.

Procedure: How to Use a Form Object to Create a Pop-Up Dialog Box

You can use a form object to create a pop-up dialog box.

1. Create a form object.
2. Create a button.
3. Select the form.
4. In the Properties panel, change the *Display container as* property to *As popup dialog*.
5. Create a new task in the Tasks section of the Tasks & Animations panel.
6. Use the button you create as the trigger.
7. Make the button object toggle the visibility of the form you created.
8. Run the page and click the button to display the form as a dialog box.

Procedure: How to Create a Pop-Up Dialog Box or Pop-Up Window From a Form Control

1. Add a button object to your HTML page.
2. Add a form control to your HTML page.
3. Delete the run and back buttons created with the form control.
4. While the form control is selected, in the Properties panel, change the Display container as property to either *As popup dialog* or *As popup window*.

As popup dialog causes the form to display as a pop-up dialog box. When the dialog box is displayed, you must click *Close* to return to your HTML page.

As popup window causes the form to display as a pop-up window. When the window is displayed, you can resize and move the window around your screen.

5. Create a new task in the Tasks section of the Tasks and Animations panel that uses the button object to toggle the visibility of the form you created.
6. Run your HTML page.

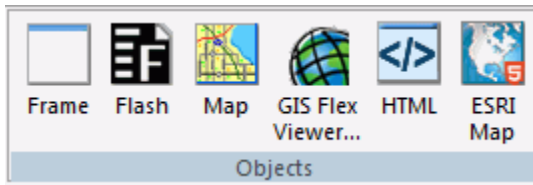
When you click the button you added to the HTML page, the form will be displayed as either a pop-up dialog box or a pop-up window, depending on what option you selected.

Reordering Tabs, Accordions, and Windows

You can reorder tabs, accordions, and windows by dragging the page that you want to appear first onto the page that you want it to display before. For example, if you have 3 tabs, Tab1, Tab2, and Tab3, and you drag Tab3 onto Tab1, Tab3 will now display ahead of Tab1. The order of the tabs will then be Tab3, Tab1, Tab2. You can reorder windows when they are in tile view.

Adding Objects to an HTML Page Using the Objects Group

You can add objects other than reports, charts, elements, or containers to customize your HTML page. The Objects group is shown in the following image.



The commands in the Objects group are:

Frame

Inserts a frame object. You can use a frame to embed additional web sources or run reports. You can also use a frame as the output location or target for a drill-down report. You can also use a frame to run a table of contents report, an OLAP report, a PDF report, or an Excel® report.

Flash

Inserts a Flash component. You can add SWF files that are Adobe® Flash Player compatible to accompany reports or graphs on an HTML page.

Note:

- ❑ When inserting Flash animations, only files that are 1 MB or smaller can be run using the HTML canvas.

Map

Inserts a map object. You can add a Google™, Bing®, or ESRI map to your HTML page. Maps are services offering powerful, user-friendly mapping technology that can be customized to show points on a map with drill-down capabilities. You can customize the map properties and bind them to a report or chart.

GIS Flex Viewer

Inserts a GIS Flex Viewer object. The GIS Flex Viewer contains numerous controls, a report, and a map object. This command is available only from the Data Servers area.

HTML

Inserts an HTML object. Developers can use the Settings panel to type a valid snippet of HTML code for the HTML object, such as HTML code to browse for a file.

ESRI Map

Inserts an ESRI map object. You can use the Settings panel to configure the properties and components.

Changing Load Order With HTML Object Manipulation

In an HTML page, objects load in the order in which they were added to the canvas. A developer using raw HTML has the option of editing the source code to change the load order. Such edits leverage the Document Object Model (DOM) for HTML and XML documents.

In App Studio, however, the source code cannot be edited. Therefore the HTML object manipulation menu is provided to allow you to change the load order, if necessary.

To change the load order, select multiple objects or components in the HTML canvas, then right-click and select HTML object manipulation. The following menu options are available:

- ☐ **Add selected to new container.** To put a container around two or more multiselected objects. Objects in a container load at the same time.
- ☐ **Append selected.** Available when the last multi-selected object is a container. Use this option to move one or more multi-selected objects into the container.
- ☐ **Insert selected before.** To load the last multiselected object before the other selected objects.
- ☐ **Insert selected after.** To load the last multiselected object after the other selected objects.
- ☐ **Swap selected.** To swap positions for two multiselected objects.

Inserting Controls in an HTML Page Using the Controls Tab

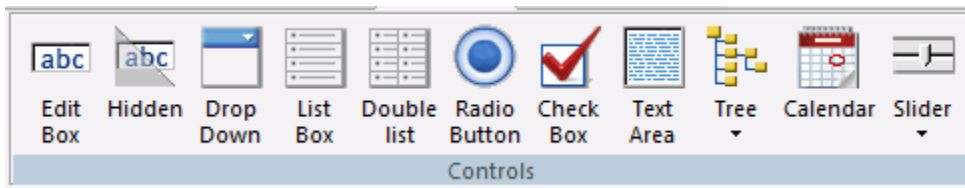
You can use the Controls tab and group to insert controls in an HTML page or a Guided Report page. Controls enable you to prompt users for a parameter value. When you create a parameter as part of a report or graph, the HTML canvas automatically adds a control, Submit button, and Reset button for the parameter to your layout, and the parameter appears on the Parameters tab. You can also add an input control and bind it to a parameter.

Controls, with the exception of a text box which does not supply a list of possible values, can supply values with a dynamic or static list of values:

- ❑ A dynamic list retrieves values from a specified data source when the request is run.
- ❑ A static list consists of a list of values you supply. These values do not change unless you change them.

An active report control lists active report values that mimic active report menu items. The active report controls cannot be associated to any parameters in the layout. This type of control can only be associated with an active report in the layout.

The properties of a control, as well as the parameters associated with each control, can be controlled with the Properties tab of the Properties window, and with the Parameters tab. The Controls tab is shown in the following image.



The controls are:

Edit Box

Inserts a text box. A text box enables you to enter a value in an entry field. You can specify a list of static or dynamic accepted values in Settings panel and, at run time, when you type the first letter of a value into the text box, that value will be listed as an autocomplete suggestion.

Hidden

Inserts a hidden control. A hidden input control allows parameter values to be used in a control without the user seeing them. When a hidden control is used, the current input control assigned to the parameter will not be visible. The value of the parameter can be entered in the Properties panel of the Parameters tab, or supplied through chaining.

Drop Down

Inserts a drop-down list. A drop-down list enables you to select single or multiple values from a list of supplied values. In order to provide multiple values, the procedure must be set up to accept multiple values.

- ❑ A single-select drop-down list enables you to select only one value for each time a request is run.

- ❑ A multi-select drop-down list enables you to select multiple values using the check boxes adjacent to the values.

You can use a dynamic or static list of values for the drop-down list.

List Box

Inserts a list. This enables you to select single or multiple values at one time:

- ❑ A single-select list enables you to select only one value for each time a request is run.
- ❑ A multi-select list enables you to select multiple values by using the Ctrl key while selecting values.

In order to provide multiple values, the procedure must be set up to accept multiple values.

List box values can be dynamic or static.

Double list

Inserts a double list. Displays multi-select values. This enables you to view a list of the available values and add or remove them from one list to another. At run time, a report is generated based on the values that are added.

Radio Button

Inserts a radio button. Radio buttons enable you to select a single value from a list of supplied values. Radio button values can be static or dynamic.

Use the Type property to control the appearance of the radio buttons. From the drop-down list box in the Type field, select *Standard* to display standard radio buttons.

From the drop-down list box in the Type field, select *Push button* to display push buttons.

Check Box

Inserts a check box. Check boxes enable you to select a single value from a list of supplied values. Note that if there are multiple check box input controls that are grouped together, you may select the Multiple properties for each control. Multiple ensures that you can select a single value from each check box control. Check box list values can be dynamic or static.

Use the Type property to control the appearance of the check boxes. From the drop-down list box in the Type field, select *Standard* to display standard check boxes.

From the drop-down list box in the Type field, select *Push button* to display push buttons.

Text area

Inserts a text area. A text area is a single-select control that enables you to enter multiple lines of text that can be assigned to a single variable. The behavior is similar to a text box, but you are not restricted to entering just one line of text. For example, if you want to assign a paragraph (multiple lines of text) to a variable that can be referenced by a procedure, you can add the paragraph to a text area from the Properties panel on the Parameters tab.

Tree

Inserts either a single-source tree control or multi-source tree control. By using a tree structure in an HTML report, you can show hierarchical data from a multi-dimensional data source (for example, SAP BW), that uses the parent/child model. You may also use a tree control for non-hierarchical data sources. Level hierarchies are not supported. The behavior of the tree control is integrated with the parameter definition. If a parameter is defined as a single value and that parameter is bound to a tree control, the tree control uses option buttons for each node in the hierarchy. If the parameter is defined as Multiselect OR or Multiselect AND, and that parameter is bound to a tree control, then the tree control uses check boxes for each node in the hierarchy, enabling you to select multiple nodes.

Calendar

Inserts a calendar. Date parameters can utilize a built-in calendar control that enables you to select the desired date or range of dates in a pop-up dynamic calendar. A procedure or parameter that is added to or referenced in the HTML canvas, and contains date parameters, will have a Calendar control type available in the New Parameters dialog box. When you select the Calendar control type, a text box with a calendar icon displays in the Design view of the layout. The text box is the only control available for the calendar, and the icon always displays to the right of the text box. The icon cannot be positioned independently from the text box. Note that when programmatically returning a date to the calendar, the date must be in a WebFOCUS date format that specifies the complete date from the list of supported data types in Calendar Properties.

Slider

Inserts a horizontal or vertical slider control that has a numeric range of values to be used with a report or chart. This enables you to use a slider bar to select from a range of values.

***Procedure:* How to Format Selected and Unselected Push Buttons for Radio Button and Checkbox Controls**

This procedure shows how you create a push button form from a radio button or checkbox control. It also shows how you can apply background color to push buttons to distinguish between selected and unselected values.

1. In the HTML canvas, create a radio button or check box control by clicking *Radio Button* or *Check Box* on the Controls tab of the ribbon. Populate the control with multiple values.
2. Select the control and open the *Properties* panel.
3. In the Properties panel, from the Type drop-down menu, select *Push button*.
Two additional properties appear: *Selected pushbutton background color* and *Unselected pushbutton background color*.
4. From the Selected pushbutton background color drop-down menu, select a background color.
5. From the Unselected pushbutton background color drop-down menu, select a different background color.
6. Save and run the HTML file.

The specified background colors appear for the selected and unselected values.

Procedure: How to Set Calendar Properties

1. Add a calendar to the HTML page by clicking the *Calendar* command on the Controls tab.
Position the cursor over the HTML canvas. The pointer changes to a crosshair.
2. Drag the crosshair to create a calendar and adjust it to the size you want.
A calendar placeholder is created in the layout and assigned the name *calendar(n)*, where *(n)* is a number.
3. Optionally, change the calendar properties by adjusting the properties displayed in the Properties panel.
4. Bind an existing parameter to the calendar.
Binding a parameter to a calendar control creates an incoming parameter. The incoming parameter value must be in a WebFOCUS date format that specifies the complete date from the list of supported data types in Calendar Properties. The incoming parameter value will populate the calendar with date values.
 - ❑ Click the *Parameters* view tab.
 - ❑ Select the center of the parameter name object, drag the parameter to the center of the calendar object, and release the mouse to complete the binding.
 - ❑ To unbind the parameter from the calendar, select the arrow head on the line, so that the line is bold. Right-click and click *Break binding*.
5. Bind the calendar to a parameter.

Binding the calendar to a parameter will populate the parameter with a date value.

- ❑ Click the *Parameters* view tab.

The Settings panel opens, showing the calendar setup options. The calendar setup options enable you to set the range of dates available to the user at run time. Available dates are represented as an active hyperlink (blue and underlined). Unavailable dates are static (black without underlines).

Note: The Settings panel for a calendar contains different options depending on the selected data type.

- ❑ Create the values for the calendar. You can create Static or Dynamic values.

When the Current/Start date option is checked, the current date will be used in the calendar control at run time.

The Date Range options for setting up the calendar include:

- ❑ **Static.** This option will set a static date range in which the developer will select a start date and an end date using a pop-up calendar icon, or by clicking the month, day, or year from the controls.

The pop-up calendar icon appears in the From and To sections when the *Static* Date Range is selected. If you click the pop-up calendar icon, a pop-up calendar appears and shows the current date selected and circled in red by default. As you scroll through the calendar with the left/right arrows, the currently selected day will remain highlighted for each month. Clicking a date will add that date to the control. Dates can be selected by scrolling left to right, entering the month, day, and year as text, or by selecting the month, day, and year from the drop-down list and spin boxes.

- ❑ **Relative.** This option allows you to set a specific number of days, months, and years relative to the current date. The current date (at run time) will always be the reference or starting point and the calendar will show a number of days, months, and years relative to the current date. The range could be all in the past (for example, five years prior to the current date) or all in the future (for example, five years in the future). This is selected as the default Date Range.

- ❑ **Dynamic.** This option allows you to point to a request that returns a range of dates. Clicking the *Select custom request* drop-down list box allows you to choose a preexisting request. The request must return two date values on the same data line in XML format. The date values must be returned in a format that returns two digits for the month and day, and four digits for the year, for example, MM/DD/YYYY.

- ❑ Close the Settings panel to create the calendar with the range of date values.
- ❑ Select the center of the calendar, drag the calendar to the center of the parameter object, and release the mouse to complete the binding.

Working With a Double-Head Slider Control

A double-head slider control is a new control you can access from the HTML canvas. A double-head slider control is a type of slider control in which you can select a range of values for displaying data in a report or chart. Rather than having one slider head, you have two. In order to use a double-head slider control, you must have two variables in the report or chart that will be controlled by the double-head slider control. One variable will be controlled by one head of the double-head slider control and the other variable will be controlled by the other head of the double-head slider control. The variables need to be specified in the procedure as FROM and TO.

Note: You can use the Report canvas to create a parameter that accepts a range of values using the Expression Builder dialog box. The Chart canvas requires you to manually create a parameter that accepts a range of values.

Procedure: How to Create a Report That Can Be Used With a Double-head Slider Control

1. Create a new report.
2. Add the fields you want displayed in your report.
3. On the Report tab, in the Filter group, select *Filter*, and click *Where* to create a Where filter.
The Expression Builder dialog box opens.
4. Double-click the field you want to use in conjunction with the Double-head slider control.
5. From the Logical Relation drop-down list, select *Is From*.
This indicates that the parameter that you are creating is a range of values.
6. Double-click the Compare Type cell to open the Range Builder dialog box.
In the Range Builder dialog box, you can name the parameters you will use for the Double-head slider control or select a field whose values you want to create a range from.
7. Type a name in the From text box.
This is the FROM value.
8. Type a name in the To text box.
This is the TO value.

These are the names of the two parameters that will be controlled by the double-head slider control.

9. Save and close the report.

This report can now be used with a double-head slider control once you set up your HTML page.

Procedure: How to Create a Double-head Slider Control From the Ribbon

1. While in the HTML canvas, click either *Horizontal* or *Vertical*, from the *Slider* command, in the *Controls* group, on the *Controls* tab.

The pointer changes to a crosshair.

2. Drag the crosshair to create a single-head slider control.
3. While the single-head slider control is selected, in the Properties panel, change the Range property from *No* to *Yes*.

Changing the Range property to *Yes* changes the single-head slider control to a double-head slider control. You can now use this control to select a range of values to display.

Procedure: How to Create a Double-head Slider Control Using the New Parameters Dialog Box

1. Create a report object or chart object on the HTML canvas.

The pointer changes to a crosshair.

2. Drag the crosshair to create a report or chart
3. Create, import, or reference a report or chart with two variables used in a FROM... TO... relationship.

The New Parameters dialog box opens.

4. In the Control Type column of the New Parameters dialog box, right-click the first parameter and then click *Slider*, and select either *Double-head Horizontal* or *Double-head Vertical*.

Note that the Control Type for the second parameter changes to *Append to Above*. This means that the second parameter has been recognized as being part of a range and will be controlled by the double-head slider control specified in the first parameter.

Procedure: How to Create an HTML Page that Uses a Double-head Slider Control

1. Create a new HTML page.
2. Add a report object to the HTML canvas.

3. Create, import, or reference a report that contains a variable that accepts a range of values.
The New Parameters dialog box opens.
4. In the Control Type column of the New Parameters dialog box, right-click the first parameter and then click *Slider*, and select either *Double-head Horizontal* or *Double-head Vertical*.

Note that the Control Type for the second parameter changes to *Append to Above*. This means that the second parameter has been recognized as being part of a range and will be controlled by the double-head slider control specified in the first parameter.
5. Click *OK* to close the New Parameters dialog box and add the double-head slider control to the HTML page.
6. Click the Parameters view tab at the bottom of the HTML canvas.
7. Drag the unbound parameter out of the Unbound Parameters box.
8. Drag the second half of the slider control to the unbound parameter.
9. Click the slider control and click the Settings panel.
10. In the Input Control Population section, change the Data type to *Dynamic*.
11. Select the data source you used in the Data Source drop-down list.
12. In the Value Field, click the ellipsis (...) and select the field being controlled by the double-head slider control.
13. Save and run your HTML page.

The double-head slider control controls what you see in your report or chart by allowing you to select a range of values rather than one specific value or all values. The first head updates the FROM value and the second head updates the TO value.

Procedure: How to Enter Masked Text in a Text Box

When entering a value in a text box at run time, you may set the Mask text property so that the text is not displayed as text, but masked by default characters. This is recommended when using passwords or other sensitive information.

1. Select the Edit Box object to view the associated properties in the Properties panel.
2. From the Mask text property field, select *Yes*.
3. Run the report and enter a value in the text box.

The value being entered appears as masked text.

Using Multi-Select Lists

Two types of multi-select lists can be used in a report: a regular list box or a drop-down list. When using either type of multi-select input control to supply parameter values, the Multiple property value indicates whether multiple values can be selected from a list of supplied values at run time.

Procedure: How to Create a List Box with Multiple Values

A multi-select list box enables you to select multiple values by using the Ctrl key while selecting values. In order to select multiple values in the list box, the procedure must be set up to accept multiple values. Ensure that the Variable Type for the parameter value is Multiselect OR or Multiselect AND in the procedure.

1. From the HTML canvas, insert a report with parameters that accept multiple values.
For example, create a report with *Multiselect OR* as the variable type for the parameter, accepting a dynamic list of values from a Master File.
2. When the New Parameters dialog box is displayed, accept the default control type of *List box* and click *OK*.
A list box is created in the layout and assigned the name *listbox(n)*, where *(n)* is a number.
3. Select *Multiple* from the Multiple drop-down list in the Properties panel.
This indicates that multiple items can be selected from the list box.
4. Save and run the HTML page.
5. Select multiple values by using the Ctrl key while selecting values from the list box.
6. Click the *Run* button to run the report with the selected value parameters.

Procedure: How to Create a Drop-Down Check Box List with Multiple Values

A multi-select drop-down list enables you to select multiple values using the check boxes adjacent to the values. In order to select multiple values in the drop-down list, the procedure must be set up to accept multiple values. Ensure that the Variable Type for the parameter value is Multiselect OR or Multiselect AND in the procedure.

1. From the HTML canvas, insert a report with parameters that accept multiple values.
For example, create a report with *Multiselect OR* as the variable type for the parameter, accepting a dynamic list of values from a Master File.
2. When the New Parameters dialog box appears, accept the default control type of *List box* and click *OK*.

A list box is created in the layout and assigned the name *listbox(n)*, where *(n)* is a number.

3. Right-click the controller, select *Set Control Type*, and select *Drop down list* to change the control type.

The controller becomes a drop-down list and assigned the name *combobox(n)* where *(n)* is a number.

4. Select *Multiple* from the Multiple drop-down list in the Properties panel.

This indicates that multiple items can be selected from the drop-down list.

5. Save and run the HTML page.
6. Select multiple values using the checkboxes displayed when you click the down arrow.
7. Click the X to close the drop-down list.
8. Click the *Run* button to run the report with the selected value parameters.

Saving Control Selections in a Browser Session

You can link the controls on HTML pages so that they automatically default to the same selected value when you switch between multiple pages in the same browser session. To do this, you need to assign a common value to the *Global name* property for each control that you want to link.

For example, you may have two HTML pages that contain controls with information that relates to regional sales. You can assign a value to the *Global name* property, such as *Region*, to each of the controls that you want to link. When you run those pages in the same browser session, and choose a value from one of the linked controls, such as *Southeast*, the controls on the other pages will refresh and display the information for the Southeast, by default.

Note: A selected value is retained as the default only during a single browser session. The value is not retained after you close the browser.

Procedure: How to Save Control Selections in a Browser Session

This procedure describes how to assign a value to the *Global name* property, which enables you to save control selections within a browser session.

Note: A selected value is retained as the default only during a single browser session. The value is not retained after you close the browser.

1. Create or open an HTML page that contains a control.

2. Click the control to highlight it.
3. In the Properties panel, under Miscellaneous, type a value in the *Global name* field. This value can be any alphanumeric string, such as *GlobalRegion1*.
4. Save the HTML page.
5. Repeat steps 1-4 for any controls that you want to link. You must assign the same *Global name* property value for each control that you want to link.

Using Tree Controls

You can insert a single-source tree control or a multi-source tree control in an HTML page.

Procedure: How to Add a Tree Control to an HTML Page Using a Default Procedure

This procedure describes how to add a tree control for a multi-dimensional data source, using a default procedure.

Note: In prior releases, a default procedure was known as an “Embedded Procedure.”

1. In the HTML canvas, insert a tree control from the Controls tab.

Tip: You may select Single source Tree control or Multi source Tree control. If no type is selected, Single source Tree control is the default. Single source Tree controls must be populated from a multi-dimensional data source such as SAP BW, SSAS, or Essbase.

The pointer changes to a crosshair.

2. Drag the crosshair to create a tree control, and adjust it to the size you want.
A tree control is created in the layout and assigned the name *treecontrol(n)*, where *(n)* is a number.
3. Optionally, you may click the *Expanded* property from the Properties panel to show the tree control expanded at run time.
4. Optionally, you may click the *Hyperlink* property from the Properties panel to show the tree nodes as hyperlinks, instead of radio buttons at run time.
5. From the Settings panel, click *Dynamic* as the Data type.
6. Keep *Default* selected and click the *browse (...)* button adjacent to the Data Source field.
The Open File dialog box appears.
7. Select a multi-dimensional data source and click *OK*.

The multi-dimensional data source is added as the default procedure.

8. Click the *browse (...)* button adjacent to *Value from field* to select a field from the hierarchy.
The Value from field is the data source field from which the values will be retrieved.
9. Click the *browse (...)* button adjacent to *Display from field* to select a field from the hierarchy.
The Display field is the text that represents the parameter value in the tree control.
10. Save and run the page to view the multi-dimensional data source in the tree control.

Procedure: How to Add a Tree Control to an HTML Page Using an Existing Procedure

You can select an existing procedure to add to the tree control in an HTML page. When you select a procedure, it should use fields from the parent/child hierarchy and be set up as follows:

```
TABLE FILE file
SUM FST.dispfield
BY ParentUniqueField
BY UniqueField
BY datafield
ON TABLE PCHOLD FORMAT XML
END
```

where:

file

Is the name of the data source.

dispfield

Is the field whose values display in the tree control.

ParentUniqueField

Is the field that represents the parent for the parent/child hierarchy (PROPERTY = PARENT_OF).

UniqueField

Is the field that represents the unique IDs for the hierarchy members (PROPERTY=UID).

datafield

Is the field whose values are passed as the parameter value.

After the procedure is set up, follow these steps:

1. From the Controls tab, insert a tree control.

Tip: You may select Single source Tree control or Multi source Tree control. If no type is selected, Single source Tree control is the default. Single source Tree controls must be populated from a multi-dimensional data source such as SAP BW, SSAS, or Essbase.

The pointer changes to a crosshair.

2. Drag the crosshair to create a tree control, and adjust it to the size you want.

A tree control is created in the layout and assigned the name `treecontrol(n)`, where *(n)* is a number.

3. Optionally, you may click the *Expanded* property from the Properties panel to show the tree control expanded at run time.
4. Optionally, you may click the *Hyperlink* property from the Properties panel to show the tree nodes as hyperlinks, instead of radio buttons at run time.
5. From the Settings panel, click *Dynamic* as the Data type.
6. Select *Explicit (Requests panel)*, select a procedure from the Request drop-down list, and then click *OK*.

The procedure name is added as the explicit procedure.

Note: In prior releases, an explicit procedure was known as an “external” procedure.

7. Click the *browse (...)* button adjacent to *Value from field* to select a field from the hierarchy or type the field manually.

The Value from field is the data source field from which the values will be retrieved.

8. Click the *browse (...)* button adjacent to *Display from field* to select a field from the hierarchy or type the field manually.

The Display field is the text that represents the parameter value in the tree control.

9. Save and run the page to view the multi-dimensional data source in the tree control.

Procedure: How to Populate a Multi Source Tree Control

You can show a tree structure for a non-hierarchical data source by using a tree control. By identifying the number of levels for the tree control, you are able to populate each level of the tree control with its own procedure. Setting the number of levels creates a tree structure by which each level is its own subcontrol, chained together with no conditions.

This procedure describes how to add parameters for a tree control, where the number of levels property is set.

1. In the HTML canvas, insert a Multi source tree control.
 - ❑ Click *Multi source Tree control* from the Tree control drop-down list, located on the Controls tab.

The pointer changes to a crosshair.

2. Drag the crosshair to create a tree control, and adjust it to the size you want.

A tree control is created in the layout and assigned the name *treecontrol(n)*, where *(n)* is a number.

3. From the Properties panel, type in the Number of levels for the tree control, and press the Enter key.

This enables you to specify the number of levels to populate.

4. Optionally, you may click the *Expanded* property from the Properties panel to show the tree control expanded at run time.
5. With the tree control selected, click the *Parameters* tab.

The tree control object shows the set number of levels.

6. Select each level of the tree control and create the settings for its data population.

When creating a Multi source Tree control, the static data type is not available. If creating static values for the tree control, you must create a single source tree control.

7. Optionally, to add an additional level for the tree control, right-click the tree control object on the Parameters tab and select *Add level*.

Note: Add level only appears for a Multi source tree control object.

8. Click the added level to view the Settings panel for that level.
9. Switch to the *Design* tab of the HTML canvas to preview the populated tree control.

Note that the Properties window drop-down list for the tree control shows each level of input values.

10. Save and run the page.

Note: If a user selects a lower level node in one level and a higher level node in another level, when the procedure is executed, only the lowest level selections will take effect. For example, you have 3 levels: COUNTRY, CAR, and MODEL. Under ENGLAND, TRIUMPH you select TR7. Under FRANCE, you select PEUGEOT. At run time you will only receive the records for TR7 because you did not select a MODEL under the FRANCE node.

The tree control populates each level with values.

Note: A value must be selected for each level before you can click the *Save Selection* button.

If a selected value is specified for a field that is not in level1, then corresponding selected values must also be specified for the preceding levels.

Only the first and second levels load at run time. If a selected value is specified for a field in level1, only values from the first two levels will be selected.

Procedure: How to Add a Tree Control to an HTML Page Using Static Values

This procedure describes how to add static data type parameters for a tree control, where the Number of levels property for the tree control is not set. This enables you to add a static list of values.

1. In the HTML canvas, insert a tree control.
2. From the Settings panel, select *Static* as the Data type.

Static is selected by default. You may select an item, delete it, or add a subitem.
3. Create the parameter values for the control:
 - ☐ Click the *New* button to add a list of values. The values are added in a sequential hierarchical structure. The last value added appears in the Value and Display Value fields.
 - ☐ To edit the value, manually type the desired value in the Value and Display Value fields.
 - ☐ Click *Append child item* from the Static values drop-down list to append a value at the level currently selected, and create a new value as the child of the selected value.
 - ☐ Click *Insert before* from the Static values drop-down list to insert a value before the selected value. Note the number of the value.
 - ☐ Click *Insert after* from the Static values drop-down list to insert a value after the selected value. Note the number of the value.

Repeat these steps until the list contains all of the values you want to include.

 - ☐ Optionally, click the *Delete* button to eliminate any values.
4. Click the *Selected* check box to show the entry in the Value field as the default value.
5. Select the *Send display value* check box to send the display value, rather than the actual data, to the parameter.
6. Save and run the page to populate the tree control with static values.

Procedure: How to Create a New Tree Control From the New Parameters Dialog Box

When a report contains one or more new amper variable parameters, the New Parameters dialog box opens when you save the report and return to the HTML canvas. You can assign a new Single source or Multi source Tree control from the HTML page to the parameter from the New Parameters dialog box.

For each parameter, you will find Name and Control Type fields, a Create control check box, and options to set the Control Type to a Single source or Multi source Tree control.

1. Import or create a report that contains parameters.

When importing a report with parameters, the New Parameters dialog box opens, prompting you to create the control type.

2. Select the new tree control from the New Parameters dialog box.

The Control Type column refreshes, showing the selected control.

3. Click OK to close the New Parameters dialog box.

The report is added and the associated parameters are bound to the tree control.

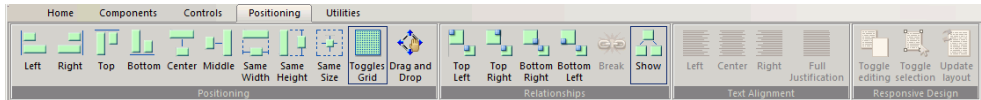
Reference: Usage Notes for Chaining Tree Controls

The following usage notes apply when chaining tree controls. You may chain controls from the New Parameters dialog box and from the Parameters tab.

- ☐ When the Multi source Tree control is a link in the chain, the New Parameters dialog box enables you to share parameters with the same multi source control.
- ☐ You can chain a Multi source Tree control to a Single source Tree control.
- ☐ You can chain a Single source Tree control to another Single source Tree control.
- ☐ You can chain a Multi source Tree control to another Multi source Tree control.
- ☐ You can chain a tree control to another non-tree control, such as Drop down list or List box.
- ☐ Chaining cannot be done with only field names.
- ☐ Dynamic population of controls with field names need to use SYSCOLUMN calls.

Positioning Objects in an HTML Page Using the Positioning Tab

Positioning options enable you to multi-select objects and position them relative to one another. The Positioning tab contains the Positioning, Relationships, Text Alignment, and Responsive Design groups, as shown in the following image.



Aligning Objects in an HTML Page Using the Positioning Group

The Positioning group contains the Left, Right, Top, Bottom, Center, Middle, Same Width, Same Height, Same Size, Toggles Grid, and Drag and Drop commands.

Left

Aligns the objects to the left. This works in relationship positioning.

Relates an object to the left of another object.

Right

Aligns the objects to the right. This works in relationship positioning.

Relates an object to the right of another object.

Top

Aligns the objects to the top of the highest selected object. This works in relationship positioning.

Bottom

Aligns the objects by the bottom of the lowest selected object. This works in relationship positioning.

Center

Aligns the objects to the center of the page. This works in relationship positioning.

Aligns objects at the horizontal center point of the object.

Middle

Aligns the objects to the middle of the page. This works in relationship positioning.

Aligns objects at the vertical center point of the object.

Same Width

Makes two or more objects the same width.

Same Height

Makes two or more objects the same height.

Same Size

Makes two or more objects the same size.

Toggles Grid

Turns the grid on and off.

Drag and Drop

Turns parent/child Drag and Drop on and off.

When this command is off (default), drag and drop is used only to reposition objects on the HTML canvas.

When this command is on, drag and drop is used to designate a parent/child relationship between two objects.

Procedure: How to Designate a Parent/Child Relationship using Drag and Drop

There are instances where you want an object in your HTML canvas to be a child to another object. For example, you may have a report (child) that you want to place within a tab container (parent).

1. Open an HTML file in which the two objects have been created.
2. Click the Positioning tab.
3. Click the Drag and Drop command to toggle it on.

Alternatively, you can select Toggle Drag and Drop from the HTML canvas shortcut menu.

The Drag and Drop command on the Positioning tab is now highlighted.

4. Click the designated child object and drag it toward the designated parent object.

A small rectangle appears below your cursor, but the child object itself does not move.

5. Move your cursor to the designated parent object and drop.

The parent/child relationship is now created.

6. To restore the default drag and drop, click the Drag and Drop command to toggle it off.

Note: When the Drag and Drop command is on, you are unable to reorder tabs or page containers, when using the Tab, Accordion, or Window components.

Relating Objects in an HTML Page Using the Relationships Group

The Relationships group contains the Top Left, Top Right, Bottom Right, Bottom Left, Break, and Show commands. The Top Left, Top Right, and Bottom Right commands are only available for HTML pages and Guided Report pages.

Top Left

Relates two or more objects on a page. Two objects must be selected. Relates an object to the top left of another object.

Top Right

Relates two or more objects on a page. Two objects must be selected. Relates an object to the top right of another object.

Bottom Right

Relates two or more objects on a page. Two objects must be selected. Relates an object to the bottom right of another object.

Bottom Left

Relates two or more objects on a page. Two objects must be selected. Relates an object to the bottom left of another object.

Break

Breaks the relationship between the objects selected.

Show

Shows or hides the relationship between objects.

Aligning Text in an HTML Page Using the Text Alignment Group

The Text Alignment group contains the Left, Center, Right, and Full Justification commands. These commands align text within the HTML page. The Text Alignment group is shown in the following image.

Left

Aligns selected text to the left.

Center

Aligns selected text to the center.

Right

Aligns selected text to the right.

Full Justification

Fully justifies the selected text, meaning that the text fills the width of the text box.

Enabling Responsive Design for an HTML Page Using the Responsive Design Group

The Responsive Design group contains the Toggle Editing, Toggle Selection, and Update Layout commands. These commands are enabled when the Responsive design property is set to Yes.

Toggle Editing

Toggle on to allow containers that include controls to be dragged to a new position. Toggle off to prevent those containers from being repositioned.

Toggle Selection

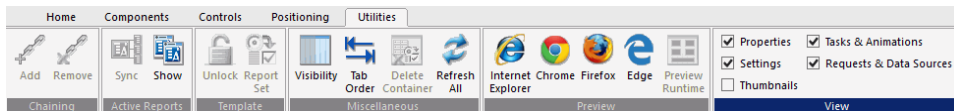
Toggle on to allow containers that include content to be dragged to a new position. Toggle off to prevent those containers from being repositioned.

Update Layout

Click to refresh the HTML canvas after you reposition containers, to show how the containers will stack when folded. This command is activated when the Autosize Enable property is set to Yes for both the document and the object.

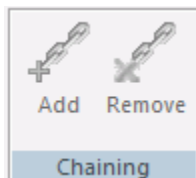
Changing HTML Page Properties Using the Utilities Tab

You can change HTML page properties using the Utilities tab. The Utilities tab is shown in the following image.



Chaining Objects in an HTML Pages Using the Chaining Group

You can add or remove chaining options using the Chaining group. The Chaining group is shown in the following image.



The commands are:

Add

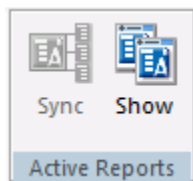
Chains two or more objects that are selected in the Parameters tab.

Remove

Unchains two or more selected, chained objects in the Parameters tab.

Synchronizing an Active Report in an HTML Page Using the Active Reports Group

You can synchronize an active report. This group is available only for an HTML page and a Guided Report page. The active reports group is shown in the following image.



The commands are:

Sync

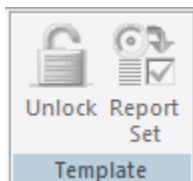
Syncs an active report.

Show

Shows the synchronization of the canvas.

Unlocking a Template for an HTML Page Using the Template Group

You can unlock a template to add controls, text, and buttons. This group is available only for an HTML page and a Guided Report page. The Template group is shown in the following image.



The commands are:

Unlock

Unlocks the template that you are using and allows for full control of the page.

Report Set

In template mode, this adds a title bar and a form with controls, text, and buttons as a set.

Working With the Miscellaneous Group in the HTML Canvas

The Miscellaneous group contains the Visibility, Tab order, Delete Container, and Refresh All commands. This group is available only for an HTML page and a Guided Report page. The Miscellaneous group is shown in the following image.



The commands are:

Visibility

Toggles the visibility of hidden objects. Hidden objects are objects that have the *Visibility* property, in the Properties panel, set to *hidden*.

For more information on using the Visibility command, see [How to Toggle the Visibility of a Hidden Object](#) on page 491.

Tab order

Shows the order of the tabs.

Delete Container

Deletes the selected container, without deleting the container content.

Refresh All

Refreshes the HTML page.

Procedure: How to Toggle the Visibility of a Hidden Object

1. Insert an object into the HTML canvas.
2. Select the object you created, if it is not already selected.
3. In the Properties panel, change the *Visibility* property to *hidden*.
The object on the canvas is hidden from view.
4. On the Utilities tab, in the Miscellaneous group, click the *Visibility* command.

The hidden object is now displayed on the canvas. You can click the Visibility command again to hide the object again. At run time, this object will be hidden.

Previewing HTML Output Using the Preview Group

The Preview group, as shown in the following image, allows you to preview HTML output in Internet Explorer, Chrome, Firefox, and Edge browsers to be sure that your content displays correctly.

The Preview Runtime option is available for Responsive HTML pages only. It uses your default browser to preview your HTML run time layout with simulated data. This may be faster than running the page if it contains large amounts of data.



Note: Alternatively, you can right-click in the HTML canvas, select *Preview*, and select a browser or Preview Runtime.

The browser preview options are:

Internet Explorer

Preview your HTML output in Internet Explorer.

Chrome

Preview your HTML output in Chrome.

Firefox

Preview your HTML output in Firefox.

Edge

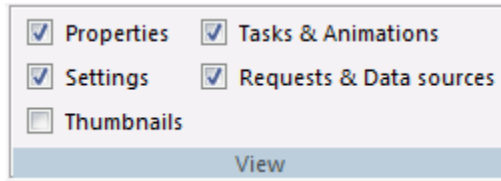
Preview your HTML output in Edge.

Preview Runtime

Available for Responsive HTML pages only. It uses your default browser to preview your HTML run time layout with simulated data.

Displaying Panels in an HTML Page Using the View Group

The View group allows you to display or hide the panels associated with an HTML Page or Guided Report page. This group is accessible in the Utilities tab of the HTML canvas and in the Text Editor tab when accessing the Embedded JavaScript/CSS view tab. The View group is shown in the following image.



The commands are:

Properties

Toggles the visibility of the Properties panel.

Settings

Toggles the visibility of the Settings panel.

Thumbnails

Toggles the visibility of the Thumbnails panel.

Tasks & Animations

Toggles the visibility of the Tasks & Animations panel.

Requests & Data sources

Toggles the visibility of the Requests & Data sources panel.

Using Parameters

Parameter values and input controls can be created with a dynamic or static list of values:

- ☐ A dynamic list retrieves values from a specified data source when the request is run.
- ☐ A static list consists of a list of values you supply. These values do not change unless you change them.

- ❑ An active control lists active report values that mimic active report menu items.

Note: The active controls cannot be associated to any parameters in the layout. This type of control can only be associated with an active report in the layout.

- ❑ The TOC control list gives you the ability to integrate a report with a Table of Contents and On Demand Paging in the HTML canvas.

Note: TOC controls cannot be associated to any parameters in the layout. This type of control can only be associated with certain input controls in the layout.

Working With the Parameters Tab

The Parameters tab enables you to create and modify parameter values, input controls, and customize parameter conditions. You can also bind parameters to controls and chain controls to one another. The Parameters tab consists of the following components:

- ❑ Input control objects.

You may select the input control object to view and edit the settings of the control.

- ❑ Creating an input control from the Design view prompts you to create a bound parameter on the Parameters tab.
- ❑ Editing an input control, which is inserted when setting input controls for new parameters.
- ❑ Add new parameters.

Right-click anywhere on the Parameters tab to add a new parameter.

Note: Manually adding a parameter creates an unbound parameter.

- ❑ Rearrange the order of objects.

When you move a parameter on the Parameters tab, a property value is automatically set. On the Properties panel, under Document properties, the *Parameters tab: auto arrange* property is automatically set to *No* when you move a parameter. This means the parameter will remain where you moved it after you navigate away, then navigate back to the Parameters tab.

You can rearrange the order of parameters and controls on the Parameters tab, which will automatically set the *Parameters tab: auto arrange* property value to *No*. This means that if you navigate away from the Parameters tab, and then return to it, the objects remain in the position you placed them. Additionally this means that the Auto Arrange Objects option, which is selected in the HTML tab of the App Studio Options dialog box by default, will be overridden.

You can change the *Parameters tab: auto arrange* property value to *Yes*, to undo any moves that you made previously, and to ensure that the objects on this tab use the auto arrange functionality.

To inherit the Auto Arrange Objects option value, you can set the *Parameters tab: auto arrange* property value to *<Not Set>*.

The *Parameters tab: auto arrange* property is available in the Properties panel. To access this property, you must select DOCUMENT, from the list at the top of the panel.

When you select an object on the Parameters tab, the properties for that object will automatically display on the Properties panel. When you select a parameters object from the Properties panel drop-down, the object is automatically selected in the Parameters tab.

❑ Refresh unresolved parameters.

All parameters on the Parameters tab are parsed every two minutes to check if any are unresolved. If there are, their surrounding polygon is colored red. If you want to check for unresolved parameters on demand, right-click and select *Refresh unresolved*.

❑ Binding controls and parameters.

Input controls and parameters can be bound and unbound from the Parameters tab.

You may bind a parameter to an input control, or bind an input control to a parameter.

❑ Binding a parameter to a control makes it an incoming parameter that will populate the control. Drag a parameter object to a control object on the Parameters tab.

❑ Binding a control to a parameter will populate the parameter. Drag a control object to a parameter object on the Parameters tab.

❑ Chain one control to another.

Chaining will populate controls based on the selected value from the prior control in the chain. You can chain static and dynamic controls, link or unlink parts of a chain, and create conditions on links in a chain. Chains are represented by lines connecting control objects on the Parameters tab. By clicking the arrow head in a link of a chain, the Settings panel enables you to modify and set properties and conditions of the chain.

Note: Chaining is applicable only for controls, not parameters.

Adding a New Unbound Parameter

An unbound parameter is useful when passing a parameter value used on another page. You may also bind the new parameter to a control to create an incoming parameter, or bind a control to the parameter.

Procedure: How to Add a New Unbound Parameter

The following steps describe how to add a new parameter:

1. Right-click anywhere on the Parameters tab and select *Add parameter*.

Enter the parameter value information. Options are *Single select*, *Multiselect OR*, and *Multiselect AND*.

2. If using single value, select *Single select*.

Note: Single select is the default option when adding a new parameter.

- a. Enter the Selected Value to be assigned to a single variable.
- b. Enter the name for the parameter in the Name field, or keep the default name.
- c. Optionally, you may use the Format field to define the format of the parameter, such as A20, or D12.2.

If this field is left blank, it automatically applies the Alphanumeric format to the value field.

3. If using a multiselect value, select *Multiselect OR* or *Multiselect AND*.

The Value, Display, and Selected columns appear.

- a. Click the *New* button to enter a list of static values.
- b. In the Value column, enter the value to be passed to the selected parameter.
- c. In the Display column, enter the text that represents the parameter value in the control the user views.
- d. In the Selected column, check the box for the value you want to be selected by default. More than one value can be selected.

Repeat these steps until the list contains all of the values you want to include.

4. Optionally, you may select values and click the *Delete* button to eliminate any values, and use the up and down arrows to rearrange the order of the values.

5. Close the Settings panel to create an unbound parameter.
6. To modify the parameter value, right-click the parameter on the Parameters tab and select *Settings* to make your edits.

Tip: You may also use the Undo and Redo buttons located on the Standard toolbar. Note that undo/redo treats the entire Settings panel as one action.

7. Optionally, bind a control to a parameter to populate the parameter. Select the center of the parameter name object and drag the parameter to the center of the control object.
8. Optionally, bind the new parameter to a control to create an incoming parameter. Select the center of the control object and drag the control to the center of the parameter object.

Creating a Static List of Values

When creating a list of static values, you can select from the following options:

- ☐ Add ignore value
- ☐ Add everything value
- ☐ Add 'No Selection' value
- ☐ Use values from procedure
- ☐ Use values from external file
- ☐ Use values from Library
- ☐ Use values from Library (include versions)

When the options are added to the Value list, the display text can be customized, but the value cannot be changed.

You may create an unbound static parameter, an incoming static parameter (a parameter that is bound to a control), or a control that is bound to a static parameter.

Reference: Settings Panel (Incoming Static Parameter and Unbound Control)

The Settings panel appears when creating or editing a static value on the Parameters tab.

The options available depend on the type of static value.

The Settings panel contains the following fields and options when Static is selected as the Data type.

Data type

Determines whether values are obtained from a static or dynamic list, an active report, or table of contents.

Static. Uses a static list of values you supply. A list of static values can also be created in the Report canvas.

Static values

Is a list of supplied values for a static list.

Value. The value to be passed to the selected parameter.

Display. The text that represents the value in the control the user views. Press the Ctrl + Shift keys to add a value to the Display field.

Selected. The value to act as the default value. If the control is multiselect, more than one value can be selected.

New. Creates a new value.

Delete. Deletes a supplied value from the list.

Move Up. Moves the selected value up in the list.

Move Down. Moves the selected value down in the list.

Send display value

Select this option to send the display value, rather than the actual data, to the parameter.

The Send display value option appears when creating an incoming static parameter (a parameter that is bound to a control), or an unbound control (a control that is not bound to a parameter). It is not available when creating an unbound static parameter.

Values are procedures names

Select this option to have a control populated with procedure names, so that when a value is selected, that procedure executes. The Value column is the procedure name itself and cannot be edited. The Display column is editable.

Reference: Settings Panel (Unbound Parameter)

The Settings panel appears when creating or editing a static value on the Parameters tab.

The options available depend on the type of static value.

The Settings panel contains the following fields and options when adding an unbound parameter with Single select. Single select is the default option when adding a new parameter.

Name

The default name assigned to the parameter. Optionally, you may enter a new name for the parameter.

Format

The Format field defines the format of the parameter, such as A20, or D12.2.

This field is optional. If this field is left blank, it automatically applies the Alphanumeric format to the value field.

Selected Value

Enter the selected value to be assigned to the parameter.

Static values

Is a list of supplied values for a static list.

Value. The value to be passed to the selected parameter.

Display. The text that represents the value in the control the user views. Press the Ctrl + Shift keys to add a value to the Display field.

Selected. The value to act as the default value. If the control is multiselect, more than one value can be selected.

New. Creates a new value.

Delete. Deletes a supplied value from the list.

Move Up. Moves the selected value up in the list.

Move Down. Moves the selected value down in the list.

Reference: Settings Panel (Bound Parameter)

The Settings panel appears when selecting a bound parameter on the Parameters tab. The Settings panel for a parameter is read-only, and displays the values for the bound control.

The Settings panel contains the following read-only values:

Value

Shows the selected value for the static parameter data.

Display

Shows the static parameter display value.

Procedure: How to Add a New Static Value

The steps below describe how to manually add a new static value:

You may create an unbound static parameter, an incoming static parameter (a parameter that is bound to a control), or a control that is bound to a static parameter.

1. Create a new parameter.

- a. Right-click anywhere on the Parameters tab and select *Add parameter*.
- b. Enter the parameter value information in the Settings panel. Options are *Single select*, *Multiselect OR*, and *Multiselect AND*.
- c. If using single value, select *Single select*.

Single select is the default option when adding a new parameter.

- ☐ Enter the Selected Value to be assigned to a single variable.
- ☐ Enter the name for the parameter in the Name field, or keep the default name.
- ☐ Optionally, you may use the Format field to define the format of the parameter, such as A20, or D12.2.

If this field is left blank, it automatically applies the Alphanumeric format to the value field.

- d. If using a multiselect value, select *Multiselect OR* or *Multiselect AND*.

The Value, Display, and Selected columns appear.

- ☐ Click the *New* button to enter a list of static values.
- ☐ In the Value column, enter the value to be passed to the selected parameter.
- ☐ In the Display column, enter the text that represents the parameter value in the control the user views.
- ☐ In the Selected column, check the box for the value you want to be selected by default. More than one value can be selected.

Repeat these steps until the list contains all of the values you want to include.

- ☐ Optionally, you may select values and click the *Delete* button to eliminate any values, and use the up and down arrows to rearrange the order of the values.

- e.** Close the Settings panel to create an unbound parameter.

An unbound static parameter is useful when passing a parameter value used on another page. You may also bind the new parameter to a control to create an incoming parameter, or bind a control to the parameter.

2. Bind the new parameter to a control.

Binding a new parameter to a control creates an incoming parameter. An incoming parameter is a static parameter that is bound to a control. The parameter value will populate the control.

- a.** Select the *Design* tab and create an input control. For example, insert a list box or a drop-down list.

- b.** Click the *Parameters* tab.

The Settings panel appears for the control.

- c.** Close the Settings panel.

Close this dialog box since you are populating the control with the parameter value, which has already been created in step 1.

- d.** Select the center of the parameter name object and drag the parameter to the center of the control object.

- e.** To unbind the parameter, select the arrow head on the line, so that the line is bold, right-click, and select *Break binding*.

3. Create a control that is bound to a parameter.

Create a control with static values and bind the control to a parameter to populate the parameter with the control values.

- a.** From the Design view of the HTML canvas, select a control.

The pointer changes into a crosshair.

- b.** Drag the crosshair to create the control and adjust it to the size you want.

- c.** Click the *Parameters* tab.

The Settings panel appears for the control.

- d.** Select *Static* as the Data type.

Static is selected by default.

- e.** Create the parameter values for the control:

- ☐ In the Value column, enter the value to be passed to the control.

- ❑ In the Display column, enter the text that represents the static parameter value in the control the user views.
- ❑ In the Selected column, check the box for the value you want to be selected by default. More than one value can be selected.

Repeat these steps until the list contains all of the values you want to include.

- ❑ Optionally, you may select values and click the *Delete* button to eliminate any values, and use the up and down arrows to rearrange the order of the values.
- f. Close the Settings panel to create the control with static values.
- g. Bind the new control to a parameter: Select the center of the control object and drag the control to the center of the parameter object.
- h. To unbind the control, select the arrow head on the line, so that the line is bold, right-click and select *Break binding*.
- i. To change the default type of control, right-click the control object on the Parameters tab or the Design tab and select *Set Control Type*.

The options are Calendar, Check box, Drop down list, Hidden, List box, Radio button, Text Area, Edit box, Single source Tree control, and Multi source Tree control.

4. To modify the static value, right-click the control, or parameter, on the Parameters tab and select *Settings* to make your edits.

Reference: Adding Static Field Values From the Report Canvas

Instead of adding new static values, you may also import static value parameters that you created from the Variable Editor dialog box. Parameter values can be data values to limit your data or field names to select the fields in your report. Both types of static lists can be created in the Report canvas. This example details how to supply field values to a report through the HTML canvas and the Report canvas.

For the purposes of this example, use the CAR Master File (car.mas) that is supplied with App Studio.

1. From the HTML canvas, insert a new report.

The pointer changes into a crosshair.

2. Drag the crosshair to create a report object and adjust it to the size you want.
3. Double-click the report object.

The Open File dialog box appears.

4. Select the *car.mas* Master File and click *OK*.

The Report canvas opens.

5. From the Object Inspector, expand *Variables*, right-click *Report Variables*, and click *New Report Variable Field*.

The Variable Editor dialog box opens.

- ☐ Enter *SORTVAR* in the Name and Prompt input fields, and keep the Variable Type as Single Select.
- ☐ Click *Static list* from the Accept List section.
- ☐ Double-click *COUNTRY* and *BODYTYPE* from the Fields from database Data Context area.
The fields are added to the Static Accept List.
- ☐ Click *OK* to save the variable.

6. Create a second variable.

- ☐ Right-click *Report Variables* and click *New Report Variable Field*.
The Variable Editor dialog box.
- ☐ Enter *MEASURES* in the Name and Prompt input fields.
- ☐ Click *Multiselect AND* from the Variable Type drop-down list.
- ☐ Click *Static list* from the Accept List section.
- ☐ Double-click *CAR*, *DEALER_COST*, *RETAIL_COST*, and *SALES* from the Fields from database Data Context area.
The fields are added to the Static Accept List.
- ☐ Click *OK* to save the variable.

7. Double-click *&SORTVAR* and *&MEASURES* from the Report Variables in the Object Inspector.

The variables are added to the report.

8. Click *&SORTVAR* and select *Sort Down* from the Column Type group on the ribbon.

Note: If the parameter is to be used as a By field in a report, it must be the single-select variable type.

9. Save and close the report.

You are returned to the HTML canvas and since you are adding a report with parameters, the New Parameters dialog box appears.

10. From the New Parameters dialog box:

- ☐ Select *Double list control* from the Control Type list for MEASURES.
- ☐ Select *Do not create a form* from the Parameter grouping options drop-down list.
- ☐ Click *OK* to close the New Parameters dialog box.

The report and associated parameters are added as static field values. You may rearrange or lengthen the controls in the layout.

11. Save and run the layout.

Select the static field values (By field and the associated measures) and run the report.

Procedure: How to Add an Ignore Value

The add ignore value option sends `_FOC_NULL` to the server at run time and is intended for use with complex applications. The add ignore value option is available for Multiselect OR and Multiselect AND static parameters.

1. From the HTML canvas, use controls to supply parameter values for a report.

A report with parameters requires that you to select values (at run time) in order to generate the output.

2. Click the *Parameters* tab.

The parameters associated with each control can be controlled with the Parameters tab. The properties of a control can be controlled with the Properties tab.

3. Select a multiselect control object from the Parameters tab.

The Settings panel opens.

4. Select *Add ignore value* from the Static values drop-down list.

5. Optionally, select *Send display value* to send the display value, rather than the actual data, for the parameter values in the report.

6. Close the Settings panel.

7. Run the HTML page and select the *Ignore All* value to ignore the parameter values.

Note: Sending `_FOC_NULL` to a procedure will result in any clause of that procedure that uses that variable to be ignored.

Procedure: How to Add an Everything Value

The add everything value option uses JavaScript to send every value present in the parameter list to the server at run time. The add everything value option is available for Multiselect OR and Multiselect AND static parameters.

The add everything value option is not available for a Double List Control.

1. From the HTML canvas, use controls to supply parameter values for a report.
2. Click the *Parameters* tab.
3. Select a multiselect control object from the Parameters tab.

The Settings panel opens.

4. Select *Add everything value* from the Static values drop-down list.
5. Optionally, select *Send display value* to send the display value, rather than the actual data, for the parameter values in the report.
6. Close the Settings panel.
7. Run the HTML page and click the *Select All* parameter value to view all the parameter values.

Procedure: How to Use Values From a Procedure

This is the default option which populates the static list with field names predefined in the procedure. The use values from procedure option is available for Multiselect OR and Multiselect AND static parameters, and when adding static field values from the Report canvas.

1. From the HTML canvas, use controls to supply parameter values for a report.
2. Click the *Parameters* tab.
3. Select a multiselect control object from the Parameters tab.

The Settings panel opens.

4. Select *Use values from procedure* from the Static values drop-down list.

The field names from the procedure appear in the Settings panel.

5. Optionally, select *Send display value* to send the display value, rather than the actual data, for the parameter values in the report.
6. Close the Settings panel.
7. Run the HTML page and select the parameter values from the procedure.

Procedure: How to Import Values From an External File

This option enables you to use a local external file to provide values for the parameter. The import values from an external file option is available for Multiselect OR and Multiselect AND static parameters.

1. From the HTML canvas, use controls to supply parameter values for a report.
2. Click the *Parameters* tab.
3. Select a multiselect control object from the Parameters tab.

The Settings panel opens.

4. Select *Use values from external file* from the Static values drop-down list.

The Open File dialog box appears.

5. Select a text file from your local machine and click *Open*.

The external file can be a file with single values on each line, or two values per line, comma-delimited.

For example, in the following text file, *BOS* is the data value and *Boston* is the display value.

The imported values are loaded into the Static values area of the Parameters tab.

If there is only one value on the line in the text file, the value will populate both the data value and the display values.

6. Run the HTML page to see the imported values for the selected parameter.

Creating a Dynamic List of Values

Dynamic values are available by default if a parameter used in the procedure is associated with the selected control. A dynamic list retrieves values from a specified data source when the request is run.

Reference: Settings Panel (Dynamic Values)

The Settings panel appears when creating or editing a dynamic parameter on the Parameters tab.

The Settings panel contains the following fields and options when Dynamic is selected as the Data type:

Data type

Determines whether values are obtained from a static or dynamic list, an active report, or table of contents.

Dynamic uses a list of values retrieved from a selected data source when the request is executed. This is the default if you use an Accept clause in a Master File to create an amper variable parameter within a procedure.

Default

Is the data source from which the values will be retrieved. This is the default value when Dynamic is selected as the Data Type.

Explicit (Requests panel)

Is the existing procedure that will be called.

You may modify the explicit procedure directly from the Settings panel on the Parameters tab. If you modify the request, you can save the explicit procedure and overwrite the original request.

Data Source

Is the data source from which the values will be retrieved.

Value from field

Is the data source field from which the values will be retrieved.

Display from field

Is the text that represents the parameter value in the control the user views.

There should be a relationship between the Value from field and the Display from field. The Display from field is user-friendly text corresponding to the Value from field.

Source Code for the procedure

- ☐ When the Value from field is selected for the default procedure, the corresponding source code appears.

Tip: You may manually edit the source code if you are familiar with WebFOCUS syntax. For example, you may right-click and choose *Select a field* from the data source to add to the request. You can also right-click and choose *Use the default request*.

The source code for an default procedure includes the line *// TODO: Add your filters here to replace defaults*, as a placeholder for you to enter filters, or WHERE clauses, for the request to resolve at run time. If entering filters, only dynamic filters can be specified.

The *//TODO* line must remain in the source code in order to resolve filters at run time. One such example of this is when filters are based on chains that have conditions. If you want your own filters specified, then delete this line.

- ❑ When an explicit procedure is selected, the corresponding source code appears.

Tip: You may manually edit the source code if you are familiar with WebFOCUS syntax. For example, you may right-click and choose *Select a field* from the data source to add to the request. After editing the procedure that is associated with a control, right-click and choose *Reload explicit procedure* to reload and display the new syntax in the Settings panel. You can also right-click and choose *Save explicit procedure*. Saving the explicit procedure overwrites the original requests.

Sort

Clicking **Sort** enables you to set the sort order for displaying values in dynamic list controls. This option is useful when you want to sort each control independently of the others.

By default, the request retrieves dynamic display values from the BY sort field in the request. The results display values based on the value field.

Sort by

When Sort is enabled, you may sort the display value by the Value field or the Display field selected from the Settings panel. The default is Value field.

Sort order

When Sort is enabled, you may select the sort order as Ascending or Descending. The default sort order is Ascending.

Check for duplicate values

When creating a dynamic list of values for a report, you may remove duplicate values from input controls.

Add "ALL" Option

Adds the option to select ALL data source values to the control. Alternate text can be substituted for "ALL" using the text field to the right.

Add 'No selection' option

Optimizes performance by populating a chain one control at a time, instead of all the controls when the page initially loads. Selecting the Add 'No selection' option enables you to populate controls when necessary.

Cache run time data

When adding dynamic parameters to the HTML page, input controls retrieve data through procedures. Select this option to cache the run-time data for the selected input control. This setting is off by default.

This setting overrides the Default caching option from the HTML Page tab, which is located in the App Studio Options dialog box.

Limit values returned

Indicates that a specific number of field values will be retrieved from the data source. The specific number of fields is selected with the menu to the right.

Use last modified filter only**Send display value**

Select this option to send the display value, rather than the actual data, to the parameter.

Selected Value

Enter the value to be selected as the default value whenever the procedure is run.

Reference: Settings Panel (Bound Parameter)

The Settings panel appears when selecting a bound parameter on the Parameters tab. The Settings panel for a parameter is read-only and displays the values for the bound control.

The Settings panel contains the following read-only values:

Data Source

Shows the selected Master File for the parameter data source.

Value from

Shows the value field for the dynamic parameter data.

Display from

Shows the dynamic parameter display field.

Multiselect

Shows OR or AND, if there is a Multiselect OR or Multiselect AND dynamic parameter.

Selected Value

Shows the selected value, if there is one assigned to the variable.

Procedure: How to Create a Dynamic Value

The steps below describe how to create a dynamic list of values.

You may need to create a dynamic control that is bound to a parameter. Creating a control with dynamic values and binding the control to a parameter will populate the parameter with the control values.

1. From the Design view of the HTML canvas, select a control from the Controls submenu of the Insert menu. For example, insert a list box or drop-down list.

The pointer changes into a crosshair.

2. Drag the crosshair to create the control and adjust it to the size you want.
3. Click the *Parameters* tab.

The Settings panel opens.

4. Select *Dynamic* as the Data type.

The dynamic value options appear.

5. Create the dynamic values for the control.

- a. If you are using a default procedure to supply dynamic values, follow the steps below.

- ☐ Click the *browse (...)* button adjacent to the *Data Source* drop-down list.

The Open File dialog box appears.

- ☐ Select the Master File name and click *OK*.

- ☐ Click the *browse (...)* button adjacent to the Value from field.

The Object Inspector opens with the field names from the selected Master File.

- ☐ Double-click a field name to add it to the Value from field.

Tip: You may also use the Object Inspector icons to select a field and close the Object Inspector. The green icon is OK, the red icon is Cancel, double-clicking a value will select the value and close the dialog box without using any button, and pressing the Esc key will cancel the dialog box without using any button.

The selected field is automatically added to the Display field and the source code for the procedure appears.

- ❑ Optionally, you may click the *browse (...)* button adjacent to the Display from field to select a different field name for the Display field. (You may also use the Object Inspector icons to select a field and close the Object Inspector).
- ❑ You may manually edit the source code if you are familiar with WebFOCUS syntax. Right-click and choose *Select a field* from the data source to add to the request. For example, add an additional BY sort field to the request.
- ❑ To remove any syntax that you added, right-click and select *Use the default request*.
- ❑ The source code for a default procedure includes the line *// TODO: Add your filters here to replace defaults*, as a placeholder for you to enter filters, or WHERE clauses, for the request to resolve at run time. If you are entering filters, only dynamic filters can be specified. For example, enter a filter for the CITY in the request.

The *//TODO* line must remain in the source code in order to resolve filters at run time. One example of this is when filters are based on chains that have conditions. If you want your own filters specified, then delete this line.

b. If you are using an explicit procedure to supply dynamic values, follow the steps below.

- ❑ Select *Explicit (Requests Panel)*.
- ❑ Select a procedure from the *Requests* drop-down list.

The parameter names from the procedure are automatically added to the Value field and Display field, and the source code for the explicit procedure appears.

- ❑ Optionally, you may click the *browse (...)* button adjacent to the Value from field and Display from field to select different field names.

Tip: You may also use the Object Inspector icons to select a field and close the Object Inspector. The green icon is OK, the red icon is Cancel, double-clicking a value will select the value and close the dialog box without using any button, and pressing the Esc key will cancel the dialog box without using any button.

Only the parameter names from the explicit procedure will be available for selection.

- ❑ You may manually edit the source code if you are familiar with WebFOCUS syntax. Additionally, you may right-click and choose *Select a field* from the data source to add to the request.

- ❑ If you modify the request that is associated with a control, you can right-click and choose *Reload explicit procedure* to reload and display the new syntax in the Settings panel. Or right-click and choose to *Save explicit procedure*. Saving the explicit procedure overwrites the original requests.
- 6. Optionally, select *Add "ALL" option* to add the select ALL data source values to the control.
- 7. Optionally, select *Add 'No selection' option* to optimize performance by populating a chain one control at a time instead of all the controls when the page initially loads.
- 8. Optionally, select *Cache run time data* to cache the run time data for the selected input control.
- 9. Optionally, select *Limit values returned*, and select or type the number of field values you want to retrieve from the data source in the box to the right of this option.
- 10. Optionally, click the *Sort* option to enable and select the sort order options for displaying values in dynamic list control.
- 11. Optionally, select *Check for duplicate values* to remove any duplicate value entries from the input control at run time.
- 12. Close the Settings panel to create the control with dynamic values.
- 13. Bind the new control to a parameter. Select the center of the control object and drag the control to the center of the parameter object.
- 14. To unbind the control, select the arrow head on the line, so that the line is bold, right-click and select *Break binding*.
- 15. To change the default type of control, right-click the control object on the Parameters tab or the Design tab and select *Set Control Type*.

The options are Calendar, Check box, Drop down list, Hidden, List box, Radio button, Text Area, Edit box, Single source Tree control, and Multi source Tree control.
- 16. To modify the dynamic value, right-click the control and select *Settings* to make your edits.

Procedure: How to Create Dynamic Parameters by Adding a Filter

You may create new dynamic parameters by adding a filter to a report or graph component in the layout.

1. To create dynamic parameters for your report or graph in the Design view, right-click the report or graph object and select *Add a filter* from the shortcut menu.

The Filter options dialog box opens.
2. Select the field to be used for the parameter, the Multiselect option, and click *OK*.

The New Parameters dialog box appears.

You may select a control type for the parameter from this dialog box, or adjust them later using the Settings panel on the Parameters tab.

If the New Parameters dialog box does not appear, ensure that *Show New Parameters dialog* is selected from the HTML Page tab. To access the HTML Page tab, select *Options* from the Window menu to open the App Studio Options dialog box. From the App Studio Options dialog box, select the HTML Page tab.

3. Click *OK* to close the New Parameters dialog box.
4. The filter appears above the report or graph object.

Repeat this procedure for each additional parameter for the report or graph.

Procedure: How to Sort the Dynamic List of Values

This option is useful when you want to sort each control independently of the others.

Note: If sort options are not selected, the request retrieves dynamic display values from the BY sort field in the request, and the results display values based on the value field. Sort options are not selected by default.

1. Select a dynamic control from the Parameters tab.
The Settings panel opens.
2. Select *Sort* to enable the sort options.
You may select the Sort by and Sort order options for the control.
3. Select the Sort by options:
 - ☐ Sort by Value sorts the value by the field name from the Value field. This is the default Sort by selection.
 - ☐ Sort by Display sorts the value by the field name from the Display field.
4. Select the Sort order options:
 - ☐ Sort order Ascending sorts the value from lowest to highest. This is the default Sort order selection.
 - ☐ Sort order Descending sorts the value from highest to lowest.
5. Close the Settings panel.

Tip: You may repeat these steps and select sort options for each dynamic control on the HTML page.

6. Run the HTML page to see the sort results.

Procedure: How to Check for Duplicate Values

When creating a dynamic list of values for a report, you may remove duplicate values from input controls. This is useful if you are using your own procedure that does not use a structured data source.

The Check for duplicate values option is turned off by default.

1. From the HTML canvas, create an input control with a dynamic list of values.
2. Select the input control and click the *Parameters* tab.

The Settings panel opens for the input control.

3. Select the *Check for duplicate values* check box.

The Check for duplicate values option is only available when creating a dynamic list of values for an input control.

4. Close the Settings panel to save your selection.
5. Save and run the HTML page.

The input control removes duplicate value entries.

The following example shows a list box with a list of city values. The first list box shows the list of values with duplicate entries. The second list box shows the list with duplicate values removed.

Using Custom Procedures to Retrieve Dynamic Values

You have the option to allow customized retrieval of dynamic parameter values. By using a custom procedure, you can use the WebFOCUS language to utilize temporary HOLD files, filtering, and so on. This allows the HTML canvas to better integrate with a multitude of large and/or proprietary data sources that may require unique retrieval methods. The procedure must meet the following criteria:

- ❑ The procedure must return a name and value pair for each parameter value that will populate the list. The first value is the submission value which is passed to the control when you click the Submit button. The second value is the display value which is what you will see in the control. These two values can be the same or different.

- ❑ The procedure must return the two data values on a single data line in XML format (PCHOLD FORMAT XML).

Note: Different parameters in the same procedure can use both this option and the data source method.

For chained controls, there are two options based on whether caching is enabled:

- ❑ By default, caching is not enabled. Each parameter control must be mapped to its own procedure and the developer is responsible for writing filters or WHERE criteria to properly filter the hierarchy of controls.
- ❑ If caching is enabled for the parameter values, a single procedure can be used to populate the controls of the chained variables. In this case, the HTML canvas writes the WHERE criteria.
- ❑ Limit values returned, will not be applied. When using chaining, HTML canvas does not generate filters because it does not produce the request to create the population.

Example: Retrieving Dynamic Parameter Values With One Value

The following example shows the same value being used for the submission value and display value.

```
TABLE FILE GGSALES
PRINT DST.PRODUCT
BY PRODUCT
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```

The XML output is:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
- <fxf version="1.0" data="hold">
- <report records="4317" lines="10" columns="2" rows="10">
  <target format="" version="" type="" destination="HOLD" />
- <column_desc>
  <col colnum="c0" fieldname="PRODUCT" alias="E01" datatype="char"
    width="16" focus_format="A16" description="Product name"
    accept="" help_message="" title="Product" within="" property=""
    reference="" valign="left" />
  <col colnum="c1" fieldname="PRODUCT" alias="E02" datatype="char"
    width="16" focus_format="A16" description="Product name"
    accept="" help_message="" title="Product" within="" property=""
    reference="" valign="left" />
</column_desc>
- <table>
- <tr linetype="data" linenum="1">
  <td colnum="c0">Biscotti</td>
  <td colnum="c1">Biscotti</td>
</tr>
- <tr linetype="data" linenum="2">
  <td colnum="c0">Capuccino</td>
  <td colnum="c1">Capuccino</td>
</tr>
- <tr linetype="data" linenum="3">
  <td colnum="c0">Coffee Grinder</td>
  <td colnum="c1">Coffee Grinder</td>
</tr>
- <tr linetype="data" linenum="4">
  <td colnum="c0">Coffee Pot</td>
  <td colnum="c1">Coffee Pot</td>
</tr>
```

Example: Retrieving Dynamic Parameter Values With Two Values

The following example shows two different field values being used for the submission value and display value. In this case, PRODUCT (Product Description) is used for the display value and PCD (Product Code) is used as the submission value.

```
TABLE FILE GGSALES
PRINT DST.PRODUCT
BY PCD
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```


The XML output is:

```
<?xml version="1.0" encoding="ISO-8859-1" ?>
- <fxf version="1.0" data="hold">
  - <report records="4317" lines="10" columns="2" rows="10">
    <target format="" version="" type="" destination="HOLD" />
    - <column_desc>
      <col colnum="c0" fieldname="PCD" alias="E01" datatype="char"
        width="4" focus_format="A04"
        description="Product Identification code (for sale)" accept=""

        help_message="" title="Product ID" within=""
        property="" reference="" valign="left" />
      <col colnum="c1" fieldname="PRODUCT" alias="E02" datatype="char"
        width="16" focus_format="A16"
        description="Product name" accept="" help_message=""
        title="Product" within="" property="" reference=""
        valign="left" />
    </column_desc>
    - <table>
      - <tr linetype="data" linenum="1">
        <td colnum="c0">C141</td>
        <td colnum="c1">Espresso</td>
      </tr>
      - <tr linetype="data" linenum="2">
        <td colnum="c0">C142</td>
        <td colnum="c1">Latte</td>
      </tr>
      - <tr linetype="data" linenum="3">
        <td colnum="c0">C144</td>
        <td colnum="c1">Capuccino</td>
      </tr>
```

Note: The procedure does not have to follow this WebFOCUS syntax exactly, but the end result must be two values per data line in XML format.

Example: Retrieving Values for Chained Variables With Caching Disabled

In the following procedures, there are three parameters (REGION, ST, CITY). Caching is disabled, so each parameter control must be mapped to its own procedures.

Procedure 1 (REGION)

```
TABLE FILE GGSALES
PRINT DST.REGION
BY REGION
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```

Procedure 2 (ST)

```
TABLE FILE GGSALES
PRINT DST.ST
BY ST WHERE REGION EQ '&REGION';
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```

Procedure 3 (CITY)

```
TABLE FILE GGSALES
PRINT DST.CITY
BY CITY WHERE REGION EQ '&REGION'; WHERE ST EQ '&ST';
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```

Example: Retrieving Chained Variable Values With Caching Enabled

In the following example, caching is enabled, so a single procedure is used to populate the controls.

```
TABLE FILE GGSALES
PRINT DST.REGION DST.ST DST.CITY
BY REGION
BY ST
BY CITY
ON TABLE SET HOLDLIST PRINTONLY
ON TABLE PCHOLD FORMAT XML
END
```

The XML output is:

```
- <table>
- <tr linetype="data" linenum="1">
  <td colnum="c0">Midwest</td>
  <td colnum="c1">IL</td>
  <td colnum="c2">Chicago</td>
  <td colnum="c3">Midwest</td>
  <td colnum="c4">IL</td>
  <td colnum="c5">Chicago</td>
</tr>
```

Automatically Populating Fields With Dynamic Values

When the name of a dynamic parameter matches a corresponding field name in a data source, the HTML canvas automatically populates the field name values for the parameter.

The data source is populated by a default based on the first data source specified by a TABLE FILE or GRAPH FILE command. The data source field is populated for the Value and Display fields in the Settings panel of the Parameters tab (when Dynamic is selected as the Data type). This generates a layout report that is ready to run as long as the parameter names match the field names.

Example: Automatically Populating Fields With Dynamic Parameter Values

When the following report request is called from the HTML canvas with a push button control, the Settings panel for the PRODUCT parameter on the Parameters tab is automatically populated to dynamically retrieve the values of the PRODUCT field.

```
TABLE FILE GGSALES
SUM UNITS
BY PRODUCT WHERE ( PRODUCT EQ '&PRODUCT.Product:.' );
END
```

Creating a Static or Dynamic Parameter Value List

When creating a static or dynamic list of values, you may add an ALL value to the list of values and/or send the display value in a parameter.

The ALL feature allows developers to automatically add an ALL value to a list of values. An ALL value does the following:

- ❑ For dynamic parameters, the ALL feature sends a value of FOC_NONE to the Reporting Server alerting the server to bypass or ignore the parameter altogether. Ignoring the parameter would return all values in the data source.

- ❑ With static parameters, the ALL value typically uses JavaScript to return all of the values displayed in the list. This prevents you from having to select every value in the list manually. When using the ALL feature with static parameters, you can select from the following options:
 - ❑ Add ignore value. This option sends FOC_NONE to the server at run time, alerting the server to bypass or ignore the parameter altogether. It is intended for complex applications.
 - ❑ Add everything value. This option uses JavaScript to send every value present in the control list to the server at run time. The Add everything value option is only available with a Multiselect OR variable type.

When using a Dynamic or active report Data type, you may enter the value(s) to be selected as the default value whenever the procedure is run.

Note: You may also enter the selected value when adding a new unbound parameter on the Parameters tab.

Procedure: How to Send the Display Value for Static and Dynamic Controls

From the HTML canvas, you may send the display value, rather than the actual data, to the parameter. The display value can also be used for headings and footings in the report output.

The Send display value option appears when creating an incoming static parameter (a parameter that is bound to a control), or an unbound control (a control that is not bound to a parameter). It is not available when creating an unbound static parameter.

1. From the HTML canvas, import or create a report that contains a parameter.

When importing a report with parameters, the New Parameters dialog box appears prompting you to create the control type.

The report and control is added to the HTML canvas.

2. To send the display value for the parameter selection, select the control object (for example, select listboxn) in the Design view and click the *Parameters* tab.

The Settings panel opens.

Note: The options available in the Settings panel vary, depending on the type of values (static or dynamic) you are creating.

3. For a static list of values, the Value, Display, and Selected columns appear on the Settings panel.
 - ❑ In the Value column, enter the value to be passed to the control.

- ❑ In the Display column, enter the text that represents the static parameter value in the control the user views.
- ❑ In the Selected column, check the box for the value you want to be selected by default. More than one value can be selected.

Repeat these steps until the list contains all of the values you want to include.

- ❑ Select *Send display value*.

Tip: You may also update the display values from the Variable Editor dialog box in the Report canvas.

- ❑ Optionally, you may select values and click the *Delete* button to eliminate any values, and use the up and down arrows to rearrange the order of the values.
- ❑ Close the Settings panel.
- ❑ Click the *Design* tab to view the display values in the control object of the HTML canvas.

4. For a dynamic list of values, the Value from field and the Display from field appear on the Settings panel.

Sending the display value for Dynamic values is only applicable if you are using a Data source that contains both an internal data value and a field that the internal data value maps to for display purposes.

- a.** If using an explicit procedure to supply dynamic values, follow the steps below.

- ❑ Select *Explicit (Requests Panel)*.
- ❑ Select the procedure from the Requests drop-down list.
- ❑ Click the ellipsis button from the Value field.

The Object Inspector opens with the field names from the selected Master File.

- ❑ Double-click a field name to add it to the Value field.

The selected field is automatically added to the Display field and the source code for the default procedure appears.

- ❑ Optionally, you may click the Display field ellipsis button to select a different field name for the Display field.
- ❑ Optionally, select *Add "ALL" option* to automatically add an ALL value to a list of parameter values.

- ❑ Optionally, select *Add 'No selection' option* to optimize performance by populating a chain one control at a time instead of all the controls when the page initially loads.

- ❑ Ensure that *Send display value* is checked.

Send display value is selected by default.

b. If using an Explicit procedure to supply dynamic values, follow the steps below.

- ❑ Select *Explicit (Requests panel)*.

- ❑ Use the drop-down menu in the Request field to select the request procedure.

The parameter names from the procedure are automatically added to the Value field from and Display from field.

- ❑ Optionally, you may click the Value field and Display field ellipsis button to select a different field name.

Note: Only the parameter names from the explicit request will be available for selection.

- ❑ Optionally, select *Add "ALL" option* to automatically add an ALL value to a list of parameter values.

- ❑ Optionally, select *Add 'No selection' option* to optimize performance by populating a chain one control at a time instead of all the controls when the page initially loads.

- ❑ Ensure that *Send display value* is checked.

Send display value is selected by default.

- ❑ Close the Settings panel.

- ❑ Click the *Design* tab to view the display values in the control object of the HTML canvas.

5. Optionally, you may add a heading to the report to show the display value. Double-click the report from the HTML canvas to open and edit the report.

The report opens in the Report canvas.

6. Manually add `&Variable_TEXT` to the report heading or footing.

Note: If the report procedure uses it, `&Variable_TEXT` will always be passed, regardless of if Send display value is selected.

The heading as Display Value: &STCD_TEXT, where Store Code (STCD) is the variable name.

Tip: This is different from adding the actual value from the data source, where clicking the variable name would add <STCD to the report heading.

7. Save and close the report to return the HTML canvas.

When you create the Text variable (&Variable_TEXT), you are not prompted to set a control type for this variable when returning to the HTML canvas, as no control type is needed.

8. Run the HTML page.
9. Select the parameter for the report and run the report.

The display value is shown in the report heading.

Note: The HTML canvas passes &var_TEXT if the report procedure uses it, regardless of whether the send display value check box is checked or unchecked.

Procedure: How to Use Procedure Names as Values

The Values are procedures names option lets you populate a control with procedure names or HTML file names. When that procedure name is clicked, the procedure executes.

1. Create an HTML page that contains a listbox, a push button, and a report.

Note: In this procedure a listbox is used, however, the following controls are also able to use the Values are procedures names option: double list, drop-down, radio button, and check box.

2. Select the listbox to bring up the Settings panel.

Note: If the Settings panel does not open, select *View* and click *Settings*.

3. Select *Static* as the Data type.
4. At the bottom of the Settings panel, select *Values are procedures/html names*.
5. Click the *New* button and select procedures from your directory.

Note: You can add multiple procedure names to the Settings panel by multi-selecting procedures while in the Open File dialog box.

6. Once the procedures have been added to the Settings panel, edit the display names of the procedures by double-clicking the display contents if they are not already highlighted.
7. Right-click the button you created and click *Create Hyperlink*.

The Hyperlink Properties dialog box opens.
8. Create a hyperlink that opens a selected procedure from a control in the report frame created earlier.
 - a. For the Action, select *Procedures from control* from the drop-down list.

This option coincides with the Values are procedures names option found in the Settings panel. This option will point to an entire procedure for the hyperlink, rather than a simple value. This option is only available when a control on the HTML page is using the Values are procedures names option.
 - b. Select *listbox1* as the Source.

The source can be different if you use a different control. For example, *combobox1*, *customselect1*, *radio1*, or *checkbox1*.
 - c. Select *Frame* as the Target Type.

You could also select *New Window* as the target if you wanted the procedure to open in a new window.
 - d. Select *report1* as the Target/Template Name.
9. Run the page.
10. Select the procedure from the listbox and click the button.

The report is run.

Procedure: How to Use Selected Values as the Default Value

When using a Dynamic or active report Data type, you may enter the values to be selected as the default value whenever the procedure is run.

If you import a procedure (.fex) that has a dynamic prompt value then the input box is populated with values retrieved from the data source. If the selected value is available in the data source, the values are selected by default. If the selected value is not available in the data source, then the value(s) that you entered are ignored and the first value retrieved from the data source is selected.

1. Create or import a report that contains a parameter value.

The report and control is added to the HTML canvas.

2. To enter the selected value to be used as the default value, select the control object (for example, select listboxn) in the Design view and click the *Parameters* view tab.

The Settings panel opens.

Note: The options available in the Settings panel vary, depending on the type of values (static or dynamic) you are creating.

3. For a dynamic list of values, the Value from field and the Display from field appear on the Settings panel.

a. If using a default procedure to supply dynamic values, follow the steps below.

- ☐ Select *Default*.
- ☐ Click the ellipsis button adjacent to the *Data Source* field.

The Open File dialog box appears.

- ☐ Select the Master File name and click *OK*.
- ☐ Click the ellipsis button adjacent to the Value from field.

The Object Inspector opens with the field names from the selected Master File.

- ☐ Double-click a field name to add it to the Value from field.

The selected field is automatically added to the Display from field and the source code for the default procedure appears.

- ☐ Optionally, you may click the Display from field ellipsis button to select a different field name for the Display from field.
- ☐ Optionally, select *Add "ALL" option* to automatically add an ALL value to a list of parameter values.
- ☐ Optionally, select *Add 'No selection' option* to optimize performance by populating a chain one control at a time instead of all the controls when the page initially loads.
- ☐ Enter the exact parameter value in the Selected Value input field, as it appears in the data source.

Parameter values are case-sensitive.

- ☐ Optionally, you may enter more than one value by using a semicolon between the values. For example, CA;GA.

You may enter selected values with a semicolon or a comma. Additionally, you may also have embedded commas or semicolons in the data values. If you have these embedded characters, you must enclose all of the values in the input area in double quotation marks. For example:

ENGLAND;ITALY

ENGLAND,ITALY

"ENGLAND", "IT,ALY"

Note that even though one value in the last set has the embedded comma, both values need to be enclosed in double quotation marks.

- ☐ Close the Settings panel.

b. If using an explicit procedure to supply dynamic values, follow the steps below.

- ☐ Select *Explicit (Requests Panel)*.
- ☐ Select the procedure from the *Requests* drop-down list.

The parameter names from the procedure are automatically added to the Value from field and Display from field, and the source code for the explicit procedure appears.

- ☐ Optionally, you may click the Value from field and Display from field ellipsis button to select a different field name or to type the field name manually.

Note: Only the parameter names from the explicit procedure will be available for selection.

- ☐ Optionally, select the *Add "ALL" option* to automatically add an ALL value to a list of parameter values.
- ☐ Enter the exact parameter value in the Selected Value input field, as it appears in the data source.

Parameter values are case-sensitive.

- ☐ Optionally, you may enter more than one value by using a semicolon (;) between the values. For example, CA;GA.

You may enter selected values with a semicolon (;) or a comma (,). Additionally, you may also have embedded commas or semicolons in the data values. If you have these embedded characters, you must enclose all of the values in the input area in double quotation marks. For example:

ENGLAND;ITALY

ENGLAND,ITALY

“ENGLAND”, ”IT,ALY”

Note that even though one value in the last set has the embedded comma, both values need to be enclosed in double quotation marks.

- ❑ Close the Settings panel.

4. For an active report list of values, the Available active reports, Menu Option Types, and Common Columns appear on the Settings panel.

- ❑ Select one or more active reports from the list of Available active reports. The selected report will be bound to the active report control in the layout.

When an active report is selected, Refresh for active reports is enabled by default.

- ❑ Select the Menu Options Types for the active report control to sort, filter, list or select columns, and/or change presentation styles of the bound active report and the associated report and graph objects synchronized to the active report.
- ❑ Optionally, select the *Add "ALL" option* to automatically add an ALL value to a list of parameter values.
- ❑ Enter the exact parameter value in the Selected Value input field, as it appears in the data source.

Parameter values are case-sensitive.

- ❑ Optionally, you may enter more than one value by using a semicolon between the values. For example, CA;GA.

You may enter selected values with a semicolon or a comma. Additionally, you may also have embedded commas or semicolons in the data values. If you have these embedded characters, you must enclose all of the values in the input area in double quotation marks. For example:

ENGLAND;ITALY

ENGLAND,ITALY

“ENGLAND”, ”IT,ALY”

Note that even though one value in the last set has the embedded comma, both values need to be enclosed in double quotation marks.

- ❑ Close the Settings panel.

5. For a single-select unbound parameter, the Selected Value input field appears on the Settings panel.

- ❑ Enter the exact parameter value in the Selected Value input field, as it appears in the data source.

Parameter values are case-sensitive.

- ❑ Optionally, you may enter more than one value by using a semicolon between the values. For example, CA;GA.

You may enter selected values with a semicolon or a comma. Additionally, you may also have embedded commas or semicolons in the data values. If you have these embedded characters, you must enclose all of the values in the input area in double quotation marks. For example:

ENGLAND;ITALY

ENGLAND,ITALY

“ENGLAND”,”IT,ALY”

Note that even though one value in the last set has the embedded comma, both values need to be enclosed in double quotation marks.

- ❑ Close the Settings panel.

Even though it is a Single select parameter, multiple values are specified and selected.

6. Click the *Run* button to run the report with the selected value parameters.

The report output appears.

The selected value, if available from the data source, is automatically selected (highlighted) in the parameter list.

If the selected value is not available in the report results, then the value that you entered is ignored and the first value retrieved from the data source is shown.

Viewing the Attributes of HTML Objects Using the Properties Panel

The Properties panel shows the attributes of the object or objects selected on the canvas. For example, if you select a hyperlink object, the Properties panel shows the different attributes associated with a hyperlink, such as Enable Dragging. General attributes for the entire HTML page or Document are shown when no object is selected. The Properties panel is available when you are using the HTML canvas or Document canvas. The attributes can be sorted by category or alphabetically.

You can also select Events. When Events is selected, a list of all available JavaScript events that can be used in conjunction with an object appears. The events that are available change depending on what type of object is selected. For example, a report object has different events available than a button object. When no object is selected, events for the HTML page are displayed. Double-clicking on an event will create a function block for the selected object, using that event. You can view the created functions in the Embedded JavaScript/CSS tab, where you can type the JavaScript code to execute when the selected event occurs.

For more information on customizing the Properties panel, see [Customizing the Properties Panel for HTML Objects Using the Properties Toolbar](#) on page 530.

Color Selection

For properties that affect color, such as Background-color, Border-color, and Color, you can enter the hexadecimal value of the color you want to use directly into the property, rather than opening the Color Picker dialog box. If you use the Color Picker dialog box to select a color, the hexadecimal value of that selected color will be entered into the selected property. For more information on the Color Picker dialog box, see [Color Picker Dialog Box](#) on page 535.

Sizing

Size property fields for a selected object can be set using the Left, Top, Width, and Height fields. The default setting is in pixels (px), and the settings are also displayed in the Locations field. You can also select *<Not set>*, *auto*, or *inherit* in the Left, Top, Width, and Height fields but only pixels are displayed in the Location field.

The Position field also contributes to the location of an object in the HTML canvas. The default value is absolute, but you can change it to one of the values in the list below:

- ☐ **<Not Set>**. The element is positioned relative to its first positioned (not static) ancestor element.
- ☐ **inherit**. Inherits this property from its parent element
- ☐ **absolute**. The element is positioned relative to its first positioned (not static) ancestor element. This is the default value.

- ☐ **fixed.** The element is positioned relative to the browser window.
- ☐ **relative.** The element is positioned relative to its normal position, so setting the Left field to 20px adds 20 pixels to the elements left position.
- ☐ **static.** Elements render in order, as they appear in the document flow.
- ☐ **initial.** Sets this property to its default value.

Controls

The Name or Unique Identifier attribute settings for controls appear automatically in the Parameters tab of the HTML canvas.

- ☐ When you change the Name attribute for a control, the new name automatically appears in the Parameters tab.
- ☐ Some controls do not have a Name attribute. For these controls, the Unique Identifier setting automatically appears in the Properties panel instead.

Customizing the Properties Panel for HTML Objects Using the Properties Toolbar

The Properties toolbar contains the buttons and menus that you need to navigate and customize the contents of the Properties panel.

Categorized

Groups the attributes by category.

Alphabetical

Sorts the attributes alphabetically, without categories.

Properties

Shows the property names and values. This is the default setting. Properties and Events cannot be selected at the same time.

Events

Shows the JavaScript events that can be associated with the selected object on the canvas. Properties and Events cannot be selected at the same time.

Resizing HTML Components Using the Autosize Children Option

The Autosize Children option can resize all child components on an HTML page to automatically fit the maximum available screen space on any monitor or device where it might be viewed. For example, a single component will take up one hundred percent of the available space, while two components will take up fifty percent each.

This option is used so that when your HTML page is run on different devices, components and controls do not appear off the screen and have to be scrolled to in order to use them. To accommodate this, the orientation of components may be different on different devices. For example, a report and chart that appear side-by-side when run on a desktop monitor, may appear stacked one above the other when run on a tablet. Similarly, this difference could occur when run on a 24-inch desktop monitor and a 26-inch desktop monitor.

There are autosize Enable properties that work at both the document and component levels:

- ☐ **Autosize Children Enable.** This property is set at the document level. When set to Yes, it enables some or all of the child components in the document to resize automatically.

The Autosize Children Enable property is also available at the component level for the form, group box, and panel container objects.

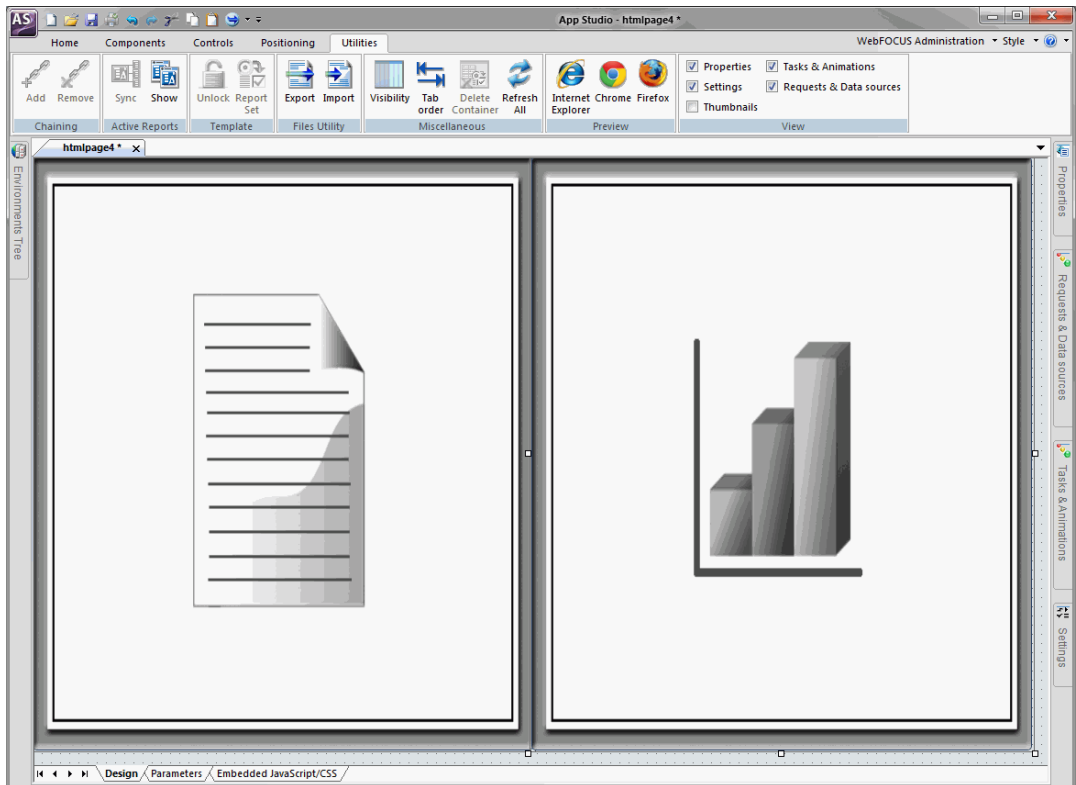
- ☐ **Autosize settings Enable.** This property is set for each component in the document. The setting for this option may be:

- ☐ Yes. Enables the component to resize automatically.

You can prevent the component from becoming too small using the Min-width and Min-height options. Type the minimum number of pixels for the width, height, or both, in the appropriate fields. When a component reaches the minimum width or height that you specified, a scroll bar appears and the size of the component does not decrease further.

- ☐ No. Prevents the individual component from resizing automatically, even when the document and other components resize. Components tagged in this way are rendered first, when the HTML page runs.

The following image shows a report component and a chart component on the HTML canvas where Autosize Children is enabled. Both components share the available space equally.



You can enable Autosize Children for an existing HTML file or create a new file with the option enabled.

Procedure: How to Enable Autosize Children for an Existing HTML File

1. Open the HTML file.
The HTML canvas opens.
2. In the Properties panel for the document, set the Autosize Children Enable property to Yes.
3. For each component on the page that you want to resize automatically, set the Autosize settings Enable property to Yes.
4. Right-click the HTML canvas and click *Update Layout*.
The components are resized to occupy all of the space on the canvas.

Procedure: How to Create a New HTML File with Autosize Children Enabled

1. On the *Home* tab, in the *Content* group, click *HTML/Document*.

You can also create a new HTML file from the Application menu or by using the shortcut menu in the Environments Tree panel, for a folder that supports content creation.

The HTML/Document Wizard opens.

2. Navigate to where you want to create your HTML page and click *Next*.

The Themes and Settings window of the HTML/Document Wizard opens.

3. In the Other settings area, select the *Autosize reports/charts for page* check box.

Selecting this option sets the Autosize Children Enable property for the document to Yes.

4. Click *Finish*.

The HTML canvas opens.

5. For each component on the page that you want to resize automatically, set the Autosize settings Enable property to Yes.

Working With Autosize Children

Working with Autosize Children entails some practices and conditions beyond those found in the native HTML canvas. This is because, when Autosize Children is enabled, components automatically move and resize themselves on the canvas.

Adding Components to the HTML Canvas

When you add a component to the canvas with the Autosize Children option enabled, the existing components will temporarily move out of the way so that you can draw the new one. The components will then reposition and resize automatically.

If the screen does not refresh, you can right-click the canvas and click *Update Layout*. There is a small amount of canvas space shown to the bottom and right of the screen, which allows you to access the shortcut menu. This extra canvas space is not shown at run time.

Note: If Update Layout does not resize the component automatically, check the properties. The Autosize Children Enabled property for the document must be set to Yes, and the Autosize settings Enable property for the component must be set to Yes. Components with an Autosize settings Enable property set to No will not resize automatically on the canvas or at run time.

To change the order of the components, drag a component to the front or to the left of another component.

The following items apply to form, group box, and panel containers:

- ❑ Forms, group boxes, and panels that contains components and controls must have the Autosize Children Enable property set to Yes, and the Autosize settings Enable property set to Yes.
- ❑ The components that are children of a form, group box, and panel have their Autosize settings Enable property automatically set to Yes. For controls that are children of a form, group box, or panel, you must manually set the Autosize settings Enable property to Yes.
- ❑ The form, group box, or panel should have the Number of Columns property set to the value you want. For example, if you want three reports or charts to be next to each other, set the value for the Number of Columns property to 3.

If an object has the Autosize settings Enable property set to No, and you want that object to occupy the entire width of the available space, you must set the Width property to 100%.

Note: Reports and charts do not automatically re-execute once the page loads and the screen size changes. You must re-execute reports and charts to ensure that the content refreshes. If the output format of a chart is HTML5, the chart content refreshes automatically and you will not have to re-execute.

Procedure: How to Add Content Inside a Container

You can easily add content inside a container, such as a panel, in the native HTML canvas. However, if the Autosize Children property is enabled, the container moves when you try to add content to it. To prevent this movement, use the following steps:

1. Click to select and freeze the container to which you want to add content.
2. On the *Components* tab, in the *Generic Elements* group, choose an object, such as a text box, that you want to add to the container.
3. Click in the container again to add the element. For example, draw the text box and type the text.
4. Click the element to select it.

In the Properties panel, set the Autosize settings Enable property to Yes, if you want the element to resize automatically.

Click No, if you want the element to remain fixed in the container.

5. Right-click the canvas and click *Update Layout*.

The content now appears inside the container.

Working With Containers

If you place an object that has Autosize settings Enable property set to No inside a container that has Autosize Children Enable property set to Yes, the object will move to the upper-left corner of the container.

When a container has Autosize Children Enable property set to Yes, and a report or chart is added to that container, the Autosize Children settings property for the report or chart is automatically set to Yes.

When a Tab, Accordion, or Window container has Autosize Children Enable property set to Yes, and multiple reports or charts are added to it, use the Number of columns property. Select the number of columns you want from the drop-down list and arrange the contents in the container, as desired. This ensures the contents will be arranged the same for all browsers. If you do not use the Number of columns property, different browsers may arrange the contents in different ways.

Reference: Color Picker Dialog Box

The Color Picker dialog box contains the Web Palette tab, Named Colors tab, System Colors tab, and Custom Color tab. From these tabs, you can pick different colors.

- ☐ **Web Palette.** You can choose a color from common web colors.
- ☐ **Named Colors.** You can choose a color from common named colors.
- ☐ **System Colors.** You can choose a color based on the colors of App Studio.
- ☐ **Custom Color.** You can drag red, green, and blue sliders to create custom colors.

The hexadecimal value for any color you select or create is displayed at the bottom of the dialog box. If you want to enter a specific hexadecimal value, you must enter using the Properties panel or the Style Composer dialog box, in the appropriate area. For example, you can enter a hexadecimal value on the Background-color property line.



Modifying the Population Settings for an HTML Object Using the Settings Panel

In App Studio, you use the Settings panel to modify the population settings of components, controls, and parameters. The Settings panel has context-sensitive sections that are displayed or hidden, depending on the object selected on the canves. When you select an object, the settings for that object are displayed in the Settings panel.

Settings are grouped under the following sections, and the sections and settings change, depending on which component, control, or parameter is selected.

❑ **Manage CSS and Scripts Section**

When no object is selected on the canvas, you can manage your cascading style sheet files and JavaScript files using the Manage CSS and Scripts section. The Settings panel displays this section by default. While on the Embedded JavaScript/CSS view tab, you can select whether you are editing your HTML page Cascading Style Sheet or JavaScript by selecting either *Internal CSS* or *Internal Java Script*, from the Settings panel.

Using the CSS  button and JavaScript  button, you can search for cascading style sheet files and JavaScript files, located in your WebFOCUS environment. You can reference web-accessible Cascading Style Sheet files and JavaScript files by typing the URL, of those files, in the URL/Find File area.

❑ **Parameter Created In Current Page Section**

To create a parameter in the current page, right click in the Parameters tab and click *Add Parameter*. The Settings panel displays the Parameter Created in Current Page section. Type the parameter name and format. Click the radio button to specify Single select, Multiselect OR, or Multiselect AND. Type a value in the Selected Value field.

❑ **The Dynamic Parameter Data Section**

When a dynamic parameter is selected on the Parameters tab, the Settings panel displays the data source file, Value field, and Display field. If the value is multiselect, you can click the drop-down list in the Multiselect field and choose OR, AND, BY, ACROSS, or NONE. Next, type the Selected Value and the Preview Value.

❑ **Input Control Population Section**

When a control is selected on the canvas and the Data type is set to Dynamic, you can drag fields and parameters from the Requests & Data sources panel to the Settings panel.

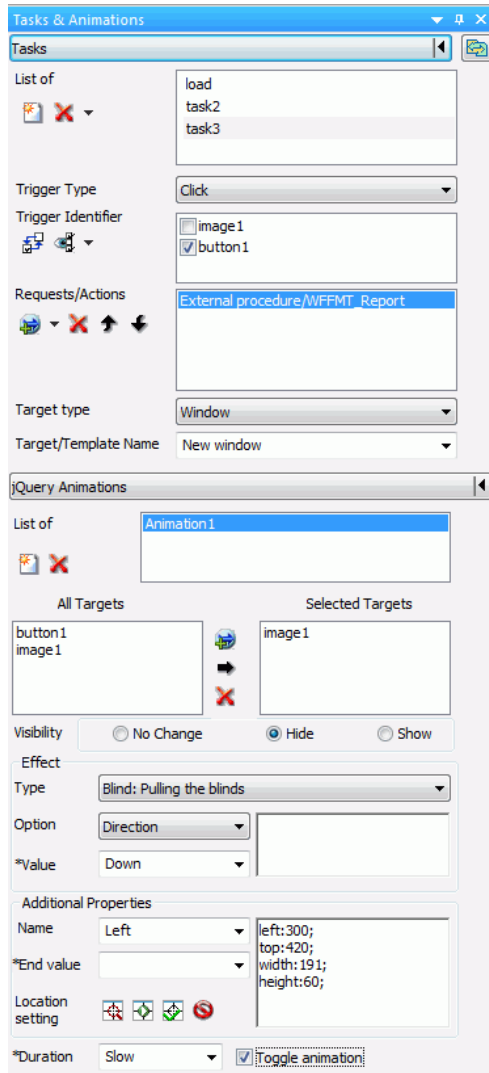
Working With the Selection To Area in the Setting Panel

The Selection to area in the Settings panel, assists in directing where control and grid selections are sent. For example, you can choose to send any selections made from a drop-down control to a specific parameter.

You can click the *Use 'Requests_Data sources' panel* button to open the Requests & Data sources panel next to the Selection to area. This allows you to drag any parameter from the Requests & Data sources panel, to the Selection to area.

Submitting Tasks Using the Tasks & Animations Panel

Using the Tasks & Animations panel, you can submit requests for parsing, execute tasks when specific criteria are met, and add jQuery animations to your HTML page. The Tasks & Animations panel is shown in the following image.



For more information on customizing the Tasks & Animations panel, see [Executing jQuery Animations Using the jQuery Animations Section](#) on page 542.

Executing a Task Using the Tasks Section

The Tasks section of the Tasks & Animations panel allows you to execute a request when specific criteria are met. For example, you can create a task that runs an embedded report when a button is clicked.

For more information, see [How to Automatically Execute a Request When a Page is Loaded](#) on page 550.

Tasks

Toggle details

Opens the Tasks dialog box which displays the Tasks section of the Tasks & Animations panel horizontally rather than vertically. Tasks are displayed in a list. This list shows the Task Name, Trigger Type, Trigger Identifier, Requests/Actions, Target Type, and Target Name, of each task, next to each other. When the Tasks dialog box is opened, the Tasks section of the Tasks & Animations panel is collapsed.

List of

A list of tasks defined in the HTML page.

New task

Creates a new task. A task is an actionable item.

Delete

Deletes a selected task. You can use the drop-down list to delete a selected task or to delete all untriggered tasks.

Trigger Type

Determines when a task should start. You can choose:

- ☐ Click
- ☐ Click link
- ☐ Double click
- ☐ Mouse down
- ☐ Mouse enter
- ☐ Mouse leave
- ☐ Mouse move
- ☐ Mouse over

- ☐ Mouse out
- ☐ Mouse up
- ☐ Blur
- ☐ Selection Changed
- ☐ Checkbox: Check
- ☐ Checkbox: Uncheck
- ☐ TBD
- ☐ Maps: Selected marker drill down
- ☐ Maps: anywhere click
- ☐ Grids: Cell Modified
- ☐ Grids: Cell Selection Changed
- ☐ Grids: Cell Edit Start
- ☐ Grids: Cell Edit Finish
- ☐ Grids: Column Sized
- ☐ Grids: Column Selection Changed

Note: The TBD trigger type can be used when a task is executed by an API call.

Trigger Identifier list

A list of all possible triggers based on what option you have selected from the Trigger filters list.

Clear Triggers Selection

Deselects any object you have selected in the Trigger Identifier list.

Buttons, Images, Hyperlinks/Selected Only

You can select whether to display buttons, images, hyperlinks, or other objects as possible Trigger Identifiers. The options are:

- ☐ Buttons, Images, Hyperlinks
- ☐ Buttons
- ☐ Images

- ☐ Hyperlinks
- ☐ Menu Items
- ☐ All
- ☐ Selected Only

When *All* is selected, objects that are not buttons, images, or hyperlinks become available for use as Trigger Identifiers. For example, with *All* selected, a text object can be a Trigger Identifier.

Selected only will make objects you have selected on the canvas appear in the Trigger Identifier list.

Requests/Actions list

A list that displays the order in which the requests, for the selected tasks, will execute any Wait for completion requests and any refresh requests. You can use Wait for completion requests to have certain requests execute before others. For example, if request1 is above the Wait for completion action and request2 is below that, then request1 will run first and when that is completed, request2 will then run.

Requests selections

Allows you to select which request(s) to add to the Requests/Actions list. Each request selected populates the Target type field with the available targets in which that request can be executed.

- ☐ **Run Request.** Displays the available reports, created in the Request & Data sources panel.
- ☐ **Schedule Request.** Displays the available reports, created in the Request & Data sources panel.
- ☐ **Run Animation.** Displays the available jQuery animations.
- ☐ **Execute Task.** Displays the available tasks, to enable you to execute one task from within another.
- ☐ **Refresh.** Creates an action to refresh the selected target.
- ☐ **Wait for completion.** Allows you to specify that one request must complete before the next one begins.

- ❑ **JavaScript call.** Creates a JavaScript call action. When using the JavaScript call, different results occur depending on what is returned. If the JavaScript call returns 0, then all actions after it run. If the JavaScript call returns 1, then one action after the call is skipped, and all actions after that are then run. If the JavaScript call returns 2, all actions after it are skipped.

Delete

Deletes a request from the Requests/Actions list.

Move Up

Moves an item on the Requests/Actions list up one place.

Move Down

Moves an item on the Requests/Actions list down one place.

Target type

The Target type option contains a list of targets in which the request can be executed. These targets can be controls, frames, windows, or distribution methods when the Request is set to Schedule. These options can be different for specific actions.

The Window Target type will execute the request in a window.

The InfoWindow Target type will execute the request in the WebFOCUS generated InfoWindow.

The Ajax call Target type will execute the request as an asynchronous call in JavaScript.

The Frame Target type will execute the request in a selected frame.

The Deferred Target type will run the report deferred.

The Input Control Target Type is only available when you have a refresh request selected in the Requests/Actions list. This Target Type specifies that an input control will be refreshed. You specify which control should be refreshed by selecting one from the Target/Template Name list.

The active report Target Type is only available when you have a refresh request selected in the Requests/Actions list. This Target Type specifies that an active report will be refreshed. You specify the active report that will be refreshed by selecting one from the Target/Template Name list.

The Refresh BI Portal Target Type is only available when you have a refresh request selected in the Requests/Actions list. This Target Type specifies that a WebFOCUS BI Portal page will be refreshed. If you select *All pages of the portal*, all BI Portal pages will be refreshed. If you select *Current page only*, only the current BI Portal page will be refreshed.

The JavaScript function Target Type is only available when you have selected *JavaScript call* in the Requests/Actions field. This Target Type specifies that the selected task will call a JavaScript function that you type in the Function name field.

Target/Template Name

Contains options that are associated with the Target type option.

This field title changes to Function name under the following conditions:

- ☐ The Trigger Type *TBD* was selected.
- ☐ The Requests/Actions *JavaScript call* was selected.
- ☐ The Target type *JavaScript function* was selected.

In the Function name field, you can type the function that you want to call. You can also include any parameters that are required. Parameters must be included in parentheses and multiple parameters separated by commas. If you had previously typed a function in this field, you can select it from the drop-down menu.

Size (Width / Height)

Sets the Width and Height of an InfoWindow. Only available for the InfoWindow Target Type.

Current pages only

Refresh the current WebFOCUS BI Portal page. Only available when there is a request to refresh the WebFOCUS BI portal.

All pages of portal

Refresh all WebFOCUS BI Portal pages. Only available when there is a request to refresh the WebFOCUS BI portal.

Executing jQuery Animations Using the jQuery Animations Section

The jQuery Animations section, in the Tasks & Animations panel, allows you to execute jQuery animations on your HTML page. The animation effects in the jQuery Animations section can be used individually or in conjunction with each other to create more complex animations.

For more information, see [How to Animate an Object Using the Tasks & Animations Panel](#) on page 546.

List of

A list of all animations present in the HTML page. This list will change when animations are added or deleted.

New

Adds a new animation to the HTML page. The newly added animation appears in the List of area.

Delete

Removes an animation from the HTML page. The deleted animation is removed from the List of area.

All Targets

A list of all possible targets that can be used in the current animation being defined.

Selected Targets

A list of all targets that will be used in the current animation.

Add canvas selection

Adds the currently selected object on the canvas to the Selected Targets list. Multiple objects can be selected and added at the same time.

Add from list

Adds a selected object from the All Targets list to the Selected Targets list. Multiple objects can be selected and added at the same time.

Remove

Removes an object from the Select Targets list when that object is selected. Multiple objects can be selected and removed at the same time.

Visibility

You can select whether or not to animate the target so that it is hidden or displayed. You can also select not to animate the target for visibility. The options are No Change, Hide, and Show.

Effect

The Effect group contains animation effects and the options you can use to customize those animations. Animation effects can make the target bounce, shake, pulsate, and much more. You can also customize the options associated with that animation effect. The options correlate to the effect used. Such options can be how many times the target bounces after you specify that you want the bounce effect.

Type

A drop-down list where you can select the animation effect you want to use.

Option

You can select which option value you would like to edit, if available. For example, selecting the Bounce animation type allows you to select Distance and Times in the Option drop-down list. When you select Distance or Times, you can then edit the value of either of those options in the Value area. If you select Times and then enter 3 into the Value area, your object will bounce 3 times. The options available are different depending on the effect type you choose.

Value

You can enter a number that pertains to the currently selected option and that affects the animation. For example, if you select the *Slide* type and the *Distance* option, the number you enter in the Value area will be the distance the object will slide when it is animated. The value options available are different depending on the effect type you choose.

Effect text area

As the options for the effect are set, the syntax for that effect are displayed here. You can manually adjust this syntax to affect the animation.

Additional Properties

The Additional Properties group contains animations that change the location and size of the target and the components of that target (text size, text width, border size).

Name

A drop-down list where you can select different properties that can be animated. Such properties include height, opacity, font size, and others.

End value

The value for the property you choose from the Name field. For example, if you choose Left and enter 10, the object you are animating would move 10 pixels to the left. The reason you do not need to specify a start value is because the current location of the object is the start value.

Location setting

You can animate the target so that the location and size of that target is changed once the animation is activated.

Use location of selected target

This will use the location of the currently selected target. Coordinates, height, and width of the object are entered automatically into the Location setting box. This is used when the developer plans to move the selected target object and the animation will move it back.

Start location setting

Inserts an adjustable placeholder object into the canvas, at the location of the selected target. You can move and resize this placeholder object. This object represents where the animation will move and what size it will be when the animation is complete.

Set location settings

Sets the adjustable object location and size. This will be where the animated object moves and what size it will be. It is the ending location of the selected target.

Cancel setting

Cancels the setting of the location for the animation.

Additional Properties text area

Once the location has been determined using the Location setting commands, the syntax for that location is displayed here. You can manually adjust this syntax to affect the animation.

Duration

How quickly the animation will execute. You can choose either Slow or Fast.

Toggle animation

Allows you to revert to the pre-animation state. For example, if the target moves from right to left, the next invocation of the trigger will move the target back to the original position at the right.

Procedure: How to Animate an Object Using the Tasks & Animations Panel

The following are examples for how to create and animate an HTML page with jQuery animations.

Note: Any of the jQuery animations in the jQuery Animations section can be used individually or together. Using different jQuery animations together will create a more complex animation.

1. Create an HTML page.
2. Insert an image object and a button object onto the HTML page.
3. On the Tasks & Animations panel, in the jQuery Animations section, click *New*.
A new animation is added to the animation list.
4. To make the image object, image1, the target, do one of the following:
 - ☐ Select the image object on the canvas and click the *Add canvas selection* command.
 - ☐ Select image1 from the All Targets area and click the *Add from list* command.
 - ☐ Double-click on image1 in the All Targets area to move it to the Selected Targets area.The image object, image1, is added to the Selected Targets area.
5. Select *Hide* for the Visibility option.
This animation option will cause the image to be hidden when the button is clicked.
6. On the Tasks & Animations panel, in the Tasks section, click *New*.
A new task is added to the tasks list.
7. Select *Click* from the Trigger Type drop-down list.
8. From the Trigger Identifier list, select the button object, button1.
The button will be used to activate the animation.
9. Select Animation1 from the Requests/Actions option.
When the animation is activated using the button, the image will hide.

Procedure: How to Select an Effect and Customize the Options for an Animation

The following is an example for how to select an effect for an animation and customize the options for the effect.

Note: Any of the jQuery animations in the jQuery Animations section can be used individually or together. Using different jQuery animations together will create a more complex animation.

1. Create an HTML page.
2. Insert an image object and a button object onto the HTML page.
3. On the Tasks & Animations panel, in the jQuery Animations section, click *New*.
A new animation is added to the animation list.
4. To make the image object, image1, the target, do one of the following:
 - ☐ Select the image object on the canvas and click the *Add canvas selection* command.
 - ☐ Select the image1 from the All Targets area and click the *Add from list* command.
 - ☐ Double-click on image1 in the All Targets area to move it to the Selected Targets area.
 The image object, image1, is added to the Selected Targets area.
5. Select an Effect and customize the options for that effect.
 - a. Select *Blind* from the Type drop-down list.
This will cause the image to appear as if window blinds have been pulled over it.
 - b. Select *Direction* from the Option drop-down list.

Note: Each Effect has different options available to customize. Blind has the Direction option to customize where Bounce has the Distance and Times options.
 - c. Select Horizontal from the Value field.
This will cause the image to be animated with a horizontal blind effect.

Note: The Value field will either be a drop-down list or a text entry box depending on what you selected for the Option drop-down list. For example, Direction will use this as a drop-down list while Times will use this as a text entry box.
6. On the Tasks & Animations panel, in the Tasks section, click *New*.
A new task is added to the tasks list.
7. Select *Click* from the Trigger Type drop-down list.
8. From the Trigger Identifier list, select the button object, button1.

The button will be used to activate the animation.

9. Select Animation1 from the Requests/Actions option.

When the animation is activated using the button, the image will animate with a blind effect.

Procedure: How to Create a Move or Resize Animation

The following is an example for how to create a move or resize animation.

Note: Any of the jQuery animations in the jQuery Animations section can be used individually or together. Using different jQuery animations together will create a more complex animation.

1. Create an HTML page.
2. Insert an image object and a button object onto the HTML page.
3. On the Tasks & Animations panel, in the jQuery Animations section, click *New*.
A new animation is added to the animation list.
4. To make the image object, image1, the target, do one of the following:
 - ☐ Select the image object on the canvas and click the *Add canvas selection* command.
 - ☐ Select image1 from the All Targets area and click the *Add from list* command.
 - ☐ Double-click on image1 in the All Targets area to move it to the Selected Targets area.

The image object, image1, is added to the Selected Targets area.

5. Use the Location setting options, found in the Additional Properties area, to animate the object so that it moves when activated.
 - a. Click the *Start location setting* command.
A placeholder object is shown overlapping your image.
 - b. Move the placeholder object to a different location on the HTML page.
 - c. Click the *Set location setting* command.
This removes the placeholder object and adds syntax to the Additional properties text area. When your animation is activated, it will move to a different location that you specified using the placeholder object.

6. Select *Fast* from the Duration drop-down list.

This will make the animation run at a faster speed.

7. Check the Toggle Animation check box.

Checking the Toggle Animation check box will allow you to click the button after the animation has run and restore the image to its original state (in its original location and unhidden).

8. On the Tasks & Animations panel, in the Tasks section, click *New*.

A new task is added to the tasks list.

9. Select *Click* from the Trigger Type drop-down list.

10. From the Trigger Identifier list, select the button object, *button1*.

The button will be used to activate the animation.

11. Select *Animation1* from the Requests/Actions option.

When the animation is activated using the button, the image will move to the location that you set. If you click the button a second time, it will move back to the original location.

Procedure: How to Create a Hyperlink in App Studio

You use the Hyperlink command and the Tasks & Animations panel to create hyperlinks. The following is an example of creating a hyperlink.

1. In the Components tab, in the Generic Elements group, click *Hyperlink*.

A task is added to the Tasks section of the Tasks & Animations panel with a trigger type and trigger identifier already chosen.

2. In the Requests & Data sources panel, create a new external request for a WebFOCUS Procedure.

3. Drag the request on to the canvas to create a frame.

4. In the Tasks section of the Tasks & Animations panel, in the Requests/Actions list, click the Requests selection command and select the request you created in step 2.

5. In the Trigger Type drop-down list, select *Frame*.

6. In the Target/Template Name drop-down, select the frame you created in step 3.

When the HTML page is run and you click on the hyperlink, the WebFOCUS Procedure you chose will run in the frame.

Procedure: How to Automatically Execute a Request When a Page is Loaded

You can use the Requests and Tasks sections to create a request that executes when your HTML page is loaded. To do this, you must use the load task, in the Task Section. The load task is automatically added to every page and runs all selected requests when the page initially loads.

1. Select the *load* task.
2. Select the *Load* trigger type in the Trigger Type drop-down list. This option is selected by default for a load task.
3. Select a request from the Requests/Actions list.
4. Select the destination of the procedure by using the Target type drop-down list. For example, you can have the procedure run in a new window or in a report frame on the HTML page.
5. Select which frame the procedure will run in. This option is only needed if you want to run the procedure, in a frame, on the HTML page, and not a new window.

Working With the Requests & Data Sources Panel

A request is a definition of something that can be executed. For example, you can execute a default procedure, explicit procedure, HTML page, URL, and more. If a request has parameters, those parameters will be indented and listed under the request name. By default, all parameters are sent to the Reporting Server. However, you can choose to not send a parameter in the request section by using the shortcut menu of the parameter, and clicking *Don't Send*. If you choose to not send a parameter, you must verify that your procedure can work without that value. For example, it contains a -DEFAULT value for the parameter.

When creating an external request that uses an existing file, the request inherits the name of that external file. For example, if you create an external request that uses an existing WebFOCUS procedure called *Parameter_Report*, then your external request will inherit the name *Parameter_Report*.

Each request displays two folders beneath it, the Columns and Parameters folders. The Columns folder contains the fields used in the request. The Parameters folder contains the parameters used in the request. The Parameters folder is expanded by default, while the Columns folder is collapsed by default.

The Data Sources folder contains all data sources, used for default procedures and default control population requests, in the HTML page. Referenced data sources are not displayed in the Requests & Data sources panel. You can add additional data sources to the HTML page by embedding additional requests. You can also add additional data sources by right-clicking on the Data Sources folder, and using the shortcut menu to click *Add Data Source*.

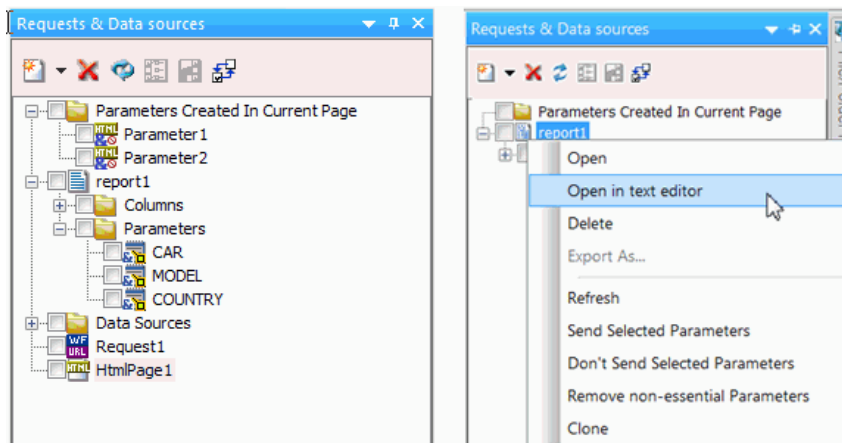
You can refresh all requests, except empty requests, using the shortcut menu. Right-click a request and click *Refresh*.

You can also duplicate a request by using the shortcut menu, on the request you want to duplicate, and clicking *Clone*. When you clone an embedded request, you create a copy of the default request with the name, *name_1*. Name is the name of the original default request. For example, if you clone a request named SalesReport, the cloned request would be called SalesReport_1. Cloning an explicit request does not make a second copy of the referenced procedure.

You can also make edits to a selected procedure using the shortcut menu and clicking *Open in text editor*, as shown in the rightmost image below. For a default procedure, the new procedure tab opens with an extension of .vrt to show it is virtual. With a referenced procedure, the procedure tab opens with an extension of .fex.

In the Requests & Data sources panel, each icon next to an item indicates the type of request or parameter. For example, a parameter that was created in the current HTML page has the parameter symbol and an addition sign on it. Another example is how an external URL request has the word *URL* on it.

Two sample Requests & Data sources panels are shown in the following images.



You can drag parameters and fields to the Settings panel to configure the selected component or control. You can drag requests from the Tasks & Animations panel to the HTML canvas, to create objects and controls for the request.

New request

Creates a new request. A request is an item that can be executed.

Delete

Deletes a selected request.

Refresh parameters

Refreshes the parameters used in the request.

Create Input Controls

Opens the New Parameter dialog box where you can select which input controls to create for parameters that are checked off in the Parameters list box, and if you want those controls chained to the parameter.

Save Selection

Saves the parameters you currently have checked off in the Parameters list box. You can choose to send more or less parameters than the procedure in the request requires. If you send less parameters, then you need to make sure the remaining parameters are handled by a -DEFAULT, -SET, or some other construct in the request.

Clear Selection

Clears all selected items in the Requests & Data sources panel.

Procedure: How to Create a Default Procedure Request in App Studio

1. Add an embedded procedure to the Requests & Data source panel. Click the *New* drop-down arrow, point to *Embedded Request*, and then click *New Report*, *New Chart*, or *New Document* to create and embed a new procedure. Point to *Import Existing* to embed an existing procedure file.

A new request is created in the Requests & Data sources panel. If you are creating a new procedure, the Open File dialog box appears, prompting you to select a Master File. If you are embedding an existing file, the Open File dialog box appears, prompting you to select a procedure file.

2. Select a Master File or procedure file and click *OK*.

If you are creating a new procedure, the canvas for that type of procedure opens. Once you are done creating the procedure, save and close the canvas.

3. In the Requests & Data sources panel, you may drag the request that you created on to the canvas.

A procedure object is created on the canvas. If the procedure contains parameters, a form control is also added to the canvas. A task is created in the Tasks section of the Tasks & Animations panel.

Specifying Browser Defaults With the Style Composer

You can use the Style Composer to control default settings for font, background properties, position mode, flow control, margins, list styles, and visual effects.

To access the Style Composer, right-click an object on your HTML page and select *Style* from the shortcut menu.

Reference: Specifying Font Styles Using the Style Composer

To specify the font styles that will be used in the browser for your HTML page, make your selections in the Font window of the Style Composer.

The Font window of the Style Composer is comprised of the following elements:

Font name

Determines the font displayed in a browser.

You can specify: *Family* (launches the Font Picker dialog box) or *System Font*.

Font attributes

Determines the attributes of the font displayed in a browser.

The options include: *Color*, *Italics*, *Small Caps*.

Size

Determines the size of the font displayed in a browser.

The options include: *Specific*, *Absolute*, *Relative*.

Bold

Determines whether the font is displayed as bold in a browser.

The options include: *Absolute*, *Relative*.

Effects

Determines whether the font effects are displayed in a browser.

The options include: *None*, *Underline*, *Strikethrough*, *Overline*, *Capitalization*.

Reference: Specifying Background Properties Using the Style Composer

To specify the background styles that will be used in the browser for your HTML page, make your selections in the Background window of the Style Composer.

The Background window of the Style Composer is comprised of the following elements:

Background color

Determines the background color of the HTML page.

You can specify: *Color, Transparent*.

Background image

Determines the properties of the background image displayed in a browser.

The options include: *Image, Tiling, Scrolling, Position* (Horizontal and Vertical), *Do not use background image*.

Note: When using a background image with scrolling enabled, you must specify the horizontal and vertical positions. If you do not specify these positions, your background image will not show. The horizontal and vertical positions are relative to the window and not the individual element.

Reference: Specifying Text Styles Using the Style Composer

To specify the text styles that will be used in the browser for your HTML page, make your selections in the Text window of the Style Composer.

The Text window of the Style Composer is comprised of the following elements:

Alignment

Determines the alignment of text.

You can specify: *Horizontal, Vertical, Justification*.

Spacing between

Determines the spacing between text.

You can specify spacing between the following text elements: *Letters, Lines*.

Text flow

Determines the flow of the text.

You can specify: *Indentation, Text direction*.

Reference: Specifying Position Mode Using the Style Composer

To specify the position mode that will be used in the browser for your HTML page, make your selections in the Position window of the Style Composer.

The Position window of the Style Composer is comprised of the following elements:

Position Mode

From which you can specify: *Position in normal flow, Offset from normal flow, Absolutely position.*

Height/Width

When Absolutely Position is selected, you can specify position indicators in the measurements.

You may specify: *Top, Left, Z-Index.*

Note: Z-Index is optional. It sets or retrieves the stacking order for absolute or relatively positioned objects.

Reference: Specifying Layout Styles Using the Style Composer

To specify the layout styles that will be used in the browser for your HTML page, make your selections in the Layout window of the Style Composer.

The Layout window of the Style Composer is comprised of the following elements:

Flow control

From which you can specify: *Visibility, Allow text to flow, Display, Allow floating objects.*

Content

From which you can specify: *Overflow.*

Clipping

From which you can specify whether or not to clip the layout from the following positions:
Top, Bottom, Left, Right.

Printing page breaks

From which you can specify: *Before, After.*

Reference: Specifying Edge Styles Using the Style Composer

To specify the margins, padding, and border styles that will be used in the browser for your HTML page, make your selections in the Edges window of the Style Composer.

The Edges window of the Style Composer is comprised of the following elements:

Margins

From which you can specify: *Top, Bottom, Left, Right.*

Padding

From which you can specify: *Top, Bottom, Left, Right*.

Reference: Specifying List Styles Using the Style Composer

To specify the list styles that will be used in the browser for your HTML page, make your selections in the Lists window of the Style Composer.

The Lists window of the Style Composer is comprised of the following elements:

Lists

From which you can specify: *Bulleted, Unbulleted*.

Bullets

From which you can specify: *Style, Position, Custom bullet*.

Reference: Specifying User Interface Effects Using the Style Composer

To specify the interface styles and visual effects that will be used in the browser for your HTML page, make your selections in the Other window of the Style Composer.

The Other window of the Style Composer is comprised of the following elements:

User interface

From which you can specify: *Cursor*.

Tables

From which you can specify: *Borders, Layout*.

Reference: Specifying Border Settings Using the Style Composer

To specify the Border settings that will be used in the browser for your HTML page, make your selections in the Border window of the Style Composer.

The Borders window of the Style Composer is comprised of the following elements:

Borders

Determines which border should be styled, what type of style should be applied, the width of the border, and the color of the border.

Rounded Border

Determines the whether your border corners will be rounded. You can style each individual corner to be rounded. You can also specify by how much they are rounded and whether all corners should be equally rounded.

Chaining in the HTML Canvas

You may chain controls to one another on the Parameters tab and apply conditions to links in the chain. Chaining will populate controls based on the selected value from the prior control in the chain. You can chain static and dynamic controls, link or unlink parts of a chain, and create conditions on links in a chain. Chains are represented by lines connecting control objects on the Design or Parameters tab. Note that chaining is applicable only for controls, not parameters.

Note:

- ❑ Although you may chain controls from the Design tab, you may only create conditions to links in the chain through the Parameters tab.

By clicking the arrow head in a link of a chain, the Settings panel enables you to modify and set the properties and conditions of the chain.

- ❑ If using static controls, you must apply conditions for each link in the chain. Conditions need to be created for each value of the control chained from, and those values must be mapped to the correct value(s) that will be displayed in the control that it is being chained to.

Automatically Chaining Parameters From the New Parameters Dialog Box

The auto chain option enables you to automatically chain selected controls from the New Parameters dialog box. Chaining populates controls based on the selected value from the prior control in the chain. The auto chain option is useful since it creates the chain, or links of a chain, automatically.

Note: Automatic chaining creates a basic chain with default functionality that does not include any conditions. You may create conditions for a chain through the Parameters tab.

When importing or referencing a report with parameters to an HTML page, the controls are not chained by default. You may choose to include or exclude individual controls in a chain with the Chain control column from the New Parameters dialog box.

Additionally, when the auto chain option is selected, a separator is added to the parameters list on the New Parameters dialog box. A separator is used to separate controls into multiple chains and can be moved up or down in the chain sequence.

Procedure: How to Auto Chain Controls From the New Parameters Dialog Box

The auto chain option creates the chain, or links of a chain, automatically. When the auto chain option is selected, a separator is added to the parameters list. A separator is used to separate controls into multiple chains and can be moved up or down in the chain sequence.

1. In the HTML canvas, import or reference a report with parameters.

The New Parameters dialog box opens.

2. Select *Auto chain controls in above specified order*.

Tip: You may use the up or down arrows to change the order of the selected control before selecting this option.

The Chain control option is selected for all controls and a separator is added as the last object to the list of parameters.

3. To create multiple chains, click the separator row and use the up or down arrows to change the location of the separator in the chain.

Note: If the default separator is moved up, another separator is added to the end of the list.

4. Click *OK* to close the New Parameters dialog box and add the control to the HTML page.

On the Design tab, when creating multiple chains from the New Parameters dialog box, each set of chained parameters appears on a new line, regardless of the grouping option selected from the New Parameters dialog box. This behavior is set through the *Start each chain on a new line* option, located on the Form Settings dialog box in the HTML Page tab of the App Studio Options dialog box. This enables you to see the relationship of the chains within the form. Start each chain on a new line is selected by default.

On the Parameters tab, chains are represented by lines connecting control objects.

5. You can remove a chain by clicking *Break binding* from the shortcut menu when a chain link is selected.

Procedure: How to Chain Controls From the New Parameters Dialog Box

The Chain control column enables you to include or exclude individual controls in a chain, from the New Parameters dialog box.

1. In the HTML canvas, import or reference a report with parameters.

The New Parameters dialog box opens.

2. Select the *Chain control* check box for the controls to be included in the chain.

The controls are chained in the order that they appear on the New Parameters dialog box. You may use the up or down arrows to change the order of the selected control before chaining controls.

Note: If a control is excluded from a chain, the chain automatically links only the selected controls.

3. Click *OK* to close the New Parameters dialog box and add the control to the HTML page.

On the Design tab, when creating multiple chains from the New Parameters dialog box, each set of chained parameters appears on a new line, regardless of the grouping option selected from the New Parameters dialog box. This behavior is set through the *Start each chain on a new line* option, located on the Form Settings dialog box in the HTML Page tab of the App Studio Options dialog box. This enables you to see the relationship of the chains within the form. Start each chain on a new line is selected by default.

On the Parameters tab, chains are represented by lines connecting control objects.

4. You can remove a chain by clicking *Break binding* from the shortcut menu when a chain link is selected.

Chaining Controls on the Parameters Tab

Chaining enables you to associate two or more related values. When you chain controls together, chained values are filtered as selections are made to each parameter control. For example, if you chain the PLANT parameter to the STATE parameter, only PLANT values for the currently selected STATE value will be available instead of all the plants in the data source. Each time a selection is made, all chained controls that come after will be dynamically updated. Chaining also enables you to add, remove, and reverse the order of controls in the chain.

Values are processed with a caching mechanism that gathers all of the necessary values prior to loading the page. This method automatically combines all of the necessary requests into a single HTTP request and maps the result sets to the appropriate controls, greatly reducing the load time involved with sending multiple requests for data.

If a parameter has two or more incoming bindings, the value selected last will be displayed as the parameter.

Note: When a parameter is populated by two or more controls, the value of the last control used will be assigned to the parameter.

Procedure: How to Chain Controls on the Parameters Tab

1. Create an HTML page using input controls to supply parameter values.
2. Click the *Parameters* tab.
3. Select the center of the control object and drag the control to the center of the next control object in the chain.

Repeat this step for each link in the chain.

4. Optionally, apply condition settings to the chain to determine how parameters are populated.
If using static controls, you must apply conditions for each link in the chain. Conditions need to be created for each value of the control chained from, and those values must be mapped to the correct value(s) that will be displayed in the control that it is being changed to.

Procedure: How to Remove a Link in the Chain

1. While on the Parameters tab, select the arrow head on the line so that the line is bold.
2. Right-click and select *Break binding*.
3. Repeat this step for each link in the chain that you want to break.

Procedure: How to Reverse the Order of Chained Controls

1. While on the Parameters tab, select the arrow head on the line so that the line is bold, right-click and select *Break binding*.
2. Select the center of the control object and drag the control to the center of the next control object in the chain.

Notice the direction of the arrow between the control objects. You may reverse the direction of the link in the chain or reverse the order of the chain by changing the direction of each link.

- ❑ If reversing the direction of a link in the chain, drag the control object in the desired order.
- ❑ If reversing the order of a chain, drag the control objects in the desired order.

Tip: In some scenarios, when reversing the order of chained values, you may want to move the controls from the default location on the Parameters tab so that you can better see the direction of the chain. Moving objects on the Parameters tab will not affect the Design view of your layout.

- ☐ Press the Shift key and select the control object and bound parameter to move the objects as a set.
 - ☐ Chain the control objects together.
3. Optionally, apply condition settings to the chain to determine how parameters are populated.

Applying Conditions to a Chain

A chain contains conditions for each link in the chain. The conditions are linked to the values being selected in the control object. You may apply multiple conditions to one link. The settings for the condition describe how the link should behave. The following options are available:

- ☐ Apply *Actions* for the links on the chain.
- ☐ Apply the *Values compare operator* for the condition.
- ☐ Apply *Selected values* with a *Multiselect operator* for the condition.
- ☐ Apply the *Resolves parameter* values for the condition.
- ☐ Apply the *Compare operator* for the condition.

If using static controls, you must apply conditions for each link in the chain. Conditions need to be created for each value of the control chained from, and those values must be mapped to the correct values that will be displayed in the control that it is being changed to.

Reference: Settings Panel (Conditions)

The Settings panel appears when creating a condition for a chain link on the Parameters tab. A chain contains conditions for each link in the chain.

The conditions are linked to the values being selected in the control object. The settings for the condition inherit the values of the prior bound control and provide additional condition settings. This section describes the additional condition settings.

The Settings panel contains the following fields and options when creating a condition:

Conditions

The conditions list enables you to create multiple conditions for the link. *Default* is the only initial condition.

- ☐ To create a new condition, click the *New* icon. Condition(*n*) is created, where (*n*) is the number, and added to the Conditions drop-down list. You may type in a unique condition name, choose Selected values, and set the condition settings.
- ☐ Click the *Delete* icon to remove the selected condition from the list. Note that the *Default* condition name cannot be deleted.

Actions

Select an action for the chain link to control. The options offer variations to populate, show, hide, execute, and select the values. The list of available options are:

- ☐ **Populate, show.** Populates the control and displays it at run time. This is the default action for all conditions.
- ☐ **Populate, hide.** Populates the control and does not display it at run time.
- ☐ **Populate with alternate, show.** Populates the control with alternate values derived from a procedure, or value list, that is not the default and displays the control at run time.
- ☐ **Populate with alternate, hide.** Populates the control with alternate values derived from a procedure, or value list, that is not the default and does not display the control at run time.
- ☐ **Show.** Shows the control but does not populate it.
- ☐ **Hide.** Hides the control but does not populate it.
- ☐ **Execute.** Executes the bound object. For example, if you bind a control to a Submit button and change the value in the control at run time, the report/chart automatically executes when you change the value, without having to click the Submit button.
- ☐ **Select.** Selects the bound object. For example, if you bind a control to a tab item and select a value in the control at run time, the bound object (the tab item) is automatically selected as the active tab on the page.
- ☐ **Use As Target.** This action is used in conjunction with a control whose values are procedure names or HTML file names. Selecting this option, binds the control to a frame for the output.

Values compare operator

Values compare operator provides chaining logic scenarios to include such options as Equal, Not Equal, Greater Than, Less Than, and so on. This option sets the condition for how to populate the control being linked to.

Equal is the default Values compare operator.

Selected values

Selected values enable you to provide the values used in the condition. When creating a new condition, the Selected values section is activated. You may type selected values in the input box or click the ellipsis button to select values from the list.

The list of values that appears is based on the values of the prior bound control in the chain.

When selected values are entered, the Multiselect operator field is activated.

Multiselect operator

The Multiselect operator options are activated when selected values are entered for the condition. Options are *One of* or *All of*. *One of* is based on one of the values shown in the Selected values, being selected in the prior control, in the chain. *All of* is based on the value of all of the Selected values, being selected in the prior control, in the chain.

One of is the default multiselect operator.

Resolves parameter (“To:” field is required)

From. The From field specifies where to get the value used in the To field, if the control being chained from is a map or activeX control.

To. The To field is used to dynamically generate the selection list used to populate the control being chained to. This field displays the parameter whose value will drive the condition evaluation. The parameter name linked to the prior control in the chain is displayed by default. The ellipsis button provides a pop-up dialog of the other parameter values (from the report) to be resolved.

Compare operator

The compare operator provides parameter chaining logic scenarios to include such options as Equal, Not Equal, Greater Than, Less Than, and so on. This sets the compare operator to populate the control.

Equal is the default Compare operator.

Procedure: How to Create a New Condition

1. Insert a report with parameters in the HTML canvas.

2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls on the chain.

3. Click a link in the chain.

The Settings panel shows the bound control values and the *Default* condition settings for the link in the chain.

4. Click the *New* icon to create a multiple condition for the chain.

Condition(*n*) is created, where (*n*) is the number, and added to the Conditions drop-down list, and the Selected values section is activated. You may type in a unique condition name.

5. You may type in a unique condition name, choose Selected values, and set the condition settings for the new condition.

6. Optionally, you may click the *Delete* button to remove the selected condition from the list.

Note: *Default*, the initial condition, cannot be deleted.

Procedure: How to Select the Action for a Condition

1. Insert a report with parameters in the HTML canvas.

2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls on the chain.

3. Click a link in the chain.

4. In the Setting panel, select the action for the condition from the *Actions* drop-down list. For example, to hide the control being chained to, select *Hide*.

Populate, *show* is the default option.

5. Close the Settings panel.

When running the HTML page, the action for the chained control is applied.

Procedure: How to Select the Values Compare Operator for a Condition

1. Insert a report with parameters in the HTML canvas.
2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls on the chain.

3. Click a link in the chain.
4. In the Setting panel, select the chaining logic for the parameter being chained to, in the condition, from the Values compare operator drop-down list.

Equal is the default option.

The compare operator is applied to the value selected.

Procedure: How to Apply Selected Values With a Multiselect Operator to a Condition

1. Insert a report with parameters in the HTML canvas.
2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls of the chain.

3. Click a link in the chain.
4. In the Setting panel, click the *New* icon to create a multiple condition for the chain.

Condition(*n*) is created, where (*n*) is the number, and added to the Conditions drop-down list, and the Selected values section is activated. You may type in a unique condition name.

5. You may type selected values in the input box or click the ellipsis button to select values from the list.

The list of values that appears is based on the values of the prior bound control in the chain.

Tip: You may also use the pop-up icons to select a field and close the pop-up dialog box. The green icon is OK, the red icon is Cancel, double-clicking a value will select the value and close the dialog box without using any button, and pressing the Esc key will cancel the dialog box without using any button.

When selected values are entered, the Multiselect operator field is activated.

6. Select the chaining logic for the selected values from the *Multiselect operator* drop-down list.
 - ☐ *One of* is based on one of the values shown in the Selected values, being selected in the prior control, in the chain. This is the default selection.
 - ☐ *All of* is based on the value of all of the Selected values, being selected in the prior control, of the chain.

The selected values and multiselect operator are applied to the condition.

Procedure: How to Resolve Parameters for a Condition

It is recommended that you populate the controls first, before chaining. When you populate first, certain information is obtained that allows the determination of the best choice for *Resolves parameter*. If you chain first and then populate, the information cannot be obtained because the chaining is already established. If you chain first, you must manually set *Resolves parameter*.

1. Insert a report with parameters in the HTML canvas.
2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls on the chain.

3. Click a link in the chain.
4. In the Setting panel, click the *Resolves parameter* ellipsis button to select a parameter name to resolve. If a custom procedure that has a filter (or filters) populates the control, the values list shows the parameters from the filters. If a data source populates the control, the values list shows all of the fields from the data source shown in the Object Inspector.

The value in the Resolves parameter field should be either:

- ☐ The field name that limits the values for the next control in the chain, if a data source populates the control.
- ☐ The parameter name from the procedure, if a procedure populates the control.

In most cases, this value will be populated by default and will not need to be changed.

Tip: You may also use the pop-up icons to select a field and close the pop-up dialog box. The green icon is OK, the red icon is Cancel, double-clicking a value will select the value and close the dialog box without using any button, and pressing the Esc key will cancel the dialog box without using any button.

5. Close the Settings panel.

The parameter value is resolved in the chain if no filter is specified.

Procedure: How to Select the Compare Operator for the Parameter

An example of when to apply chaining logic is when a form offers two lists of dates so that you can select a FROM/TO date range. By chaining these parameters together and applying the Greater than parameter compare operator, this ensures that when a date is selected for the FROM parameter, only dates that follow the FROM date display in the TO date control, eliminating the possibility of selecting an invalid date range.

1. Insert a report with parameters in the HTML canvas.
2. Drag control objects on the Parameters tab to create a chain.

Chains are represented by lines connecting control objects on the Parameters tab.

Chaining controls will populate parameters with values at run time, based on values selected in prior controls on the chain.

3. Click a link in the chain.
4. In the Setting panel, select the chaining logic option from the Compare operator drop-down list. This sets the compare operator to populate the control.

Equal is the default option.

The compare operator is applied to the parameter selected.

Procedure: How to Enable Cache Processing for Chained Values

You may enable cache processing for chained values in two ways:

- ☐ Enable the caching option for the HTML page and all objects on the page.
- ☐ Enable cache run time data for a dynamic control or a condition.

A chain contains conditions for each link in the chain. The conditions are linked to the values being bound to the control object. If you change the options for the condition, it will also be applied to the control, and vice versa.

Caching options are turned off by default.

1. To enable caching options for all objects on the HTML page, in the App Studio Options dialog box:
 - ☐ Select the *HTML Page* tab.

- ❑ Select *Default caching option*.
- ❑ Click *OK* to close the App Studio Options dialog box.

2. To enable caching options for a dynamic control or condition:

A chain contains conditions for each link in the chain. The conditions are linked to the values being chained to the control object. If you change the options for the condition, it will also be applied to the control, and vice versa.

For a dynamic control:

1. Create a dynamic input control to supply parameter values.
2. Select the dynamic control object from the Parameters tab.

The Settings panel opens, showing the dynamic control options.

3. Select *Cache run time data* to cache the run time data for the selected input control.

Note: This setting overrides the *Default caching option* from the HTML Page tab, in the App Studio Options dialog box.

4. Select the center of the control object and drag the control to the center of the next control object.

When binding controls, the conditions inherit the values set in the dynamic control settings.

For a dynamic condition:

1. Click a link on the chain to open the Settings panel for the condition.
2. Select *Cache run time data* to cache the run time data for the selected input control. This option is only available for dynamic controls.

This setting overrides the *Default caching option* from the HTML Page tab, in the App Studio Options dialog box.

When running the HTML page, data for the chained value is cached to improve performance.

Using JavaScript Code With HTML Canvas Pages

Although the HTML canvas is fully integrated with JavaScript, it is suggested that you do not create custom JavaScript that manipulates the HTML canvas generated controls, as WebFOCUS cannot support such custom JavaScript code. Additionally, there is no guarantee that the JavaScript code will work correctly in future releases.

Note:

- ❑ The HTML canvas run time is a set of JavaScript files. You should not be calling the functions within them directly. Should you call these functions directly, your code may not function in future releases and Information Builders cannot be held responsible.
- ❑ If you want JavaScript to run after a page loads completely, but before any reports are executed, you need to create a function called `onInitialUpdate` (this function was called `onInitialUpdate()` in previous releases). If you have another function, in that function, you can call `IbComposer_onInitialUpdate()`. Your code should be added inline in the HTML file after the line:

```
//End function window_onload
```

The HTML canvas run time will call `onInitialUpdate()` if it exists.

Function: IbComposer_removeSelectOption

`IbComposer_removeSelectOption` removes values from a listbox, drop down, or the 'from' listbox of a double list control.

Syntax: How to Remove Listbox or Drop Down Values

```
IbComposer_removeSelectOption(controlID,arr[]);
```

controlID

Alphanumeric

Is the unique identifier of the control from which values are obtained.

arr[]

Alphanumeric Array

Is the array that contains single or multiple values.

Note: When the `IbComposer_removeSelectOption` method is called, the values specified by the second parameter (`arr[]`) will be removed.

Example: Removing Values From a Listbox

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    var readVals = [];  
    readVals = IbComposer_getCurrentSelection('listbox1');  
    IbComposer_removeSelectOption('combobox1',readVals);  
}
```

Function: IbComposer_runAnimation

IbComposer_runAnimation runs the animation defined by the user in the Tasks and Animations panel.

Syntax: How to Run an Animation

```
IbComposer_runAnimation(name);
```

name

Alphanumeric

Is the name of the animation specified by the user in the Tasks and Animations panel.

Example: Running an Animation

```
function submit1_onclick(event) {  
    IbComposer_runAnimation('animation1');  
}
```

Function: IbComposer_triggerExecution

IbComposer_triggerExecution allows the user to execute a specific task defined in the Tasks section of the Tasks and Animations panel.

Syntax: How to Execute a Specific Task

```
IbComposer_triggerExecution(taskName,index);
```

where:

taskName

Alphanumeric

Is the name of the task specified by the user in the Tasks section of the Tasks and Animations panel in the HTML canvas.

index

Numeric

Is the task number starting from the number 1.

Example: Executing a Task

```
function submit1_onclick(event) {
    IbComposer_triggerExecution('task1',1);
}
```

Function: IbComposer_getMapObject

IbComposer_getMapObject returns the map object for the map container that is passed as the parameter. This object can then be used as a parameter in other API functions.

Syntax: How to Return a Map Object

```
IbComposer_getMapObject(mapId);
```

where:

mapId

Alphanumeric

Is the unique identifier of the map container. For example, mapcontrol1.

Example: Returning the Map Object for a Map

```
function onInitialUpdate() {
    var map = IbComposer_getMapObject('mapcontrol1');
}
```

Function: IbComposer_getMarkers

IbComposer_getMarkers returns an array of markers for a specific layer of a map.

Syntax: How to Return an Array of Markers for a Map

```
IbComposer_getMarkers(mapId, layerName);
```

where:

mapId

Alphanumeric

Is the unique identifier of the map container. For example, mapcontrol1.

layerName

Alphanumeric

Is the name of the layer for which the markers are returned. For example, layer1.

Example: Returning an Array of Markers for a Map

```
function onInitialUpdate() {  
    var map = IbComposer_getMapObject('mapcontrol1');  
    var markers = IbComposer_getMarkers('mapcontrol1','Customers');  
}
```

Function: IbComposer_populateDynamicCtrl

IbComposer_populateDynamicCtrl allows you to determine from which control data is drawn from to populate a destination control.

Syntax: How to Populate a Control Dynamically

```
IbComposer_populateDynamicCtrl(controlID,fromControlId);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control from which values are obtained. For example, listBox1.

fromControlId

Alphanumeric

Is the unique identifier of the control from which values are obtained, when two or more controls are chained to a destination control. For example, if listBox1 and listBox2 are both chained to listBox3, by default, the values of listBox3 will be determined by listBox1. You can use IbComposer_populateDynamicCtrl('listbox3','listbox2') to make listBox2 determine the values of listBox3. This identifier is optional.

Example: Populating a Control Dynamically

```
function button3_onclick(event) {
    var acc = IbComposer_populateDynamicCtrl('listbox3','listbox2');
    acc.selectNextPage();
}
```

Function: IbComposer_getComponentById

IbComposer_getComponentById obtains a component by using its ID.

Syntax: How to Obtain a Component by Using Its ID

```
IbComposer_getComponentById(controlID);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control from which values are obtained. For example, listbox1.

Example: Obtaining the Accordion Report By Using Its ID

```
function button3_onclick(event) {
    var acc = IbComposer_getComponentById('accordion1');
    acc.selectNextPage();
}
```

Function: IbComposer_getCurrentSelection

IbComposer_getCurrentSelection retrieves the current selected values from a control.

Syntax: How to Retrieve the Current Selected Value From a Control

```
IbComposer_getCurrentSelection(controlID, [layer]);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control from which values are obtained.

layer

Integer

Is an optional parameter used to specify the layer number in a multi source Tree control if a Multi source Tree control is being used. The layer number starts with 1 for the first layer.

Example: Retrieving the Current Selected Value for a Drop Down List

```
function button1_onclick(event) {  
    var values = IbComposer_getCurrentSelection('combobox1');  
    for(var i = 0; i < values.length; i++)  
        alert(values[i]);  
}
```

Function: IbComposer_getCurrentSelectionEx

IbComposer_getCurrentSelectionEx retrieves the current selected actual or display values from a control. The function can also be used to get the index values for List Boxes, Drop Down Lists, and Double Lists.

Syntax: How to Retrieve the Current Selected Value, Actual Value, or Display Value From a Control

```
IbComposer_getCurrentSelectionEx(controlID, [layer]);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control from which values are obtained.

layer

Integer

Is an optional parameter used to specify the layer number in a multi source Tree control if a Multi source Tree control is being used. The layer number starts with 0 for the first layer.

Example: Retrieving the Current Selected Index Value, Actual Value, and Display Value for a Multi-Select List

```
function button1_onclick(event) {  
    var values = IbComposer_getCurrentSelectionEx('combobox1');  
    for(var i = 0; i < values.length; i++)  
    {  
        alert("Index Value: " + values[i].getIndex() + "\n" +  
            "Actual Value: " + values[i].getValue() + "\n" +  
            "Display Value: " + values[i].getDisplayValue());  
    }  
}
```

Function: IbComposer_setCurrentSelection

IbComposer_setCurrentSelection sets the current selected values for control parameters.

Syntax: How to Set the Current Selected Value for a Control

```
IbComposer_setCurrentSelection(controlID,arrValues,bUpdateDependencies);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control for which to set the values.

arrValues

Array

Is the array of values to be set.

bUpdateDependencies

Boolean

Is an operator that can be set to true to update chained controls and triggered events. The default is false.

Example: Setting the Current Selected Value for a List Box

```
function button2_onclick(event) {
    var arr = [];
    arr.push('ITALY');
    arr.push('JAPAN');
    IbComposer_setCurrentSelection('listbox1',arr,false);
}
```

Function: IbComposer_execute

IbComposer_execute executes a report or chart.

Syntax: How to Execute a Report or Chart

```
IbComposer_execute(reportID,[outputTarget]);
```

where:

reportID

Alphanumeric

Is the unique identifier of the report or chart to execute.

outputTarget

Alphanumeric

Is the optional parameter to set the target of the output. Is one of the following:

- ☐ The name of a frame.
- ☐ `'_blank'`.
- ☐ `'_target'`.
- ☐ The name of a new window.

Example: Executing a Report in a New Window

```
function button3_onclick(event) {  
    IbComposer_execute('report1','newwin');  
}
```

Function: IbComposer_isSelected

IbComposer_isSelected determines if a control or value is selected.

Syntax: How to Determine If a Control or Value Is Selected

```
IbComposer_isSelected(controlID,[testValue]);
```

where:

controlID

Alphanumeric

Is the unique identifier of the control being tested.

testValue

Alphanumeric

Is the optional parameter the control is being checked against.

Example: Determining If a Check Box Is Selected

```
function checkbox1_onclick(event) {  
    var curValue = IbComposer_isSelected('checkbox1');  
    IbComposer_showHtmlElement('form1',curValue);  
}
```

Function: IbComposer_showHtmlElement

IbComposer_showHtmlElement shows or hides an HTML element.

Syntax: How to Show or Hide an HTML Element

```
IbComposer_showHtmlElement(elementID,bShow);
```

where:

elementID

Alphanumeric

Is the unique identifier of the element which is shown or hidden.

bShow

Boolean

Is an operator that can be set to true to show the element and false to hide it.

Example: Showing or Hiding a Check Box

```
function checkbox1_onclick(event) {
    var curValue = IbComposer_isSelected('checkbox1');
    IbComposer_showHtmlElement('form1',curValue);
}
```

Function: IbComposer_enableHtmlElement

IbComposer_enableHtmlElement enables or disables an HTML element.

Syntax: How to Enable or Disable an HTML Element

```
IbComposer_enableHtmlElement(elementID,bEnable);
```

where:

elementID

Alphanumeric

Is the unique identifier of the element which is enabled or disabled.

bEnable

Boolean

Is an operator that can be set to true to enable the element and false to disable it.

Example: Enabling or Disabling Elements

```
function checkbox2_onclick(event) {  
    IbComposer_enableHtmlElement('listbox1',  
    IbComposer_isSelected('checkbox2','country'));  
    IbComposer_enableHtmlElement('combobox1',  
    IbComposer_isSelected('checkbox2','car'));  
    IbComposer_enableHtmlElement('listbox2',  
    IbComposer_isSelected('checkbox2','model'));  
    IbComposer_enableHtmlElement('combobox2',  
    IbComposer_isSelected('checkbox2','dcost'));  
}
```

Function: IbComposer_ResetDownChainControls

IbComposer_ResetDownChainControls resets the controls down the chain from the current control to have correct corresponding values.

Syntax: How to Reset Chain Controls

```
IbComposer_ResetDownChainControls(ctrl);
```

where:

ctrl

Alphanumeric

Is the unique identifier of the first control.

Example: Resetting the Chain Started by a List Box

```
function button4_onclick(event) {  
    var arr = [];arr.push('ENGLAND');  
    IbComposer_setCurrentSelection('listbox1',arr,false);  
    IbComposer_ResetDownChainControls('listbox1');  
}
```

Function: IbComposer_selectTab

IbComposer_selectTab selects the tab specified by the tabNumberToSelect and makes it the active tab.

Syntax: How to Select a Tab and Make It Active

```
IbComposer_selectTab(tabControlID,tabNumberToSelect);
```

where:

tabControlID

Alphanumeric

Is the unique identifier of the tab control being made active.

tabNumberToSelect

Integer

Is the number of the tab to make active.

Example: Making a Tab Active

```
<FORM id=form1 onsubmit="OnExecute(this);
  IbComposer_selectTab('tab1',1) name="form1">
```

Function: IbComposer_selectTemplateTab

IbComposer_selectTemplateTab selects a tab on a template page and makes it the active tab.

Syntax: How to Select a Template Tab and Make It Active

```
IbComposer_selectTemplateTab(tabId);
```

where:

tabId

Alphanumeric

Is the unique identifier of the tab control being made active.

Example: Making a Template Tab Active

```
function submit1_onclick(event) {
  IbComposer_selectTemplateTab('tab5');
}
```

Function: IbComposer_getAllAmpersValues

IbComposer_getAllAmpersValues is used to retrieve the current selected values from all the controls on your page layout. It then takes those values and assembles them as a string that can be added to the end of a URL call. An example of this would be having a REGION control and multiselecting MidEast, NorthEast, and NorthWest. It will assemble these selections as shown below:

```
&REGION=%27MidEast%27%20OR%20%27NorthEast%27%20OR%20%27NorthWest%27
```

This function can be used in conjunction with the Business Intelligence Portal, where the generated string is appended to all Business Intelligence Portal calls that run reports or charts. This allows the parameter values to affect all portal components, even if new ones are added or existing ones are removed at run time.

Syntax: **How to Retrieve all Parameter Values**

```
IbComposer_getAllAmpersValues([verifySelection]);
```

where:

verifySelection

Boolean

Is an optional parameter. When true and when the Selection required property for the control is set to Yes, this returns an empty string for the parameter controls that do not have a selection made.

Note: All controls have the Selection required property. This property is set to Yes by default. If a control has no valid selection made at run time, a red box appears around it and the following status bar message displays:

```
Please make required selections
```

Example: **Retrieving a List of All Parameters Selected in a Report**

```
function button1_onclick(event) {  
    var val = IbComposer_getAllAmpersValues();  
    alert(val);  
    OnExecute(event);  
}
```

Event: onbeforeload

The onbeforeload event is an event handler that is used before a control is populated with values.

Syntax: **How to Use the onbeforeload Event**

```
onbeforeload(ctrl,arrValuesToLoad);
```

where:

ctrl

Is a static term and should not be changed.

arrValuesToLoad

Alphanumeric

Is the array of values that will be loaded into the control.

Example: Using a List Box With the onbeforeload Event

```
function listbox1_onbeforeload(ctrl,arrValuesToLoad) {
    for(var i = 0; i < arrValuesToLoad.length; i++) {
        alert(arrValuesToLoad[i].dispValue + " " + arrValuesToLoad[i].value +
            " " + arrValuesToLoad[i].selected);
    }
}
```

Event: onafterload

The onafterload event is an event handler used after a control is populated with values.

Syntax: How to Use the onafterload Event

onafterload(ctrl);

where:

ctrl

Is a static term and should not be changed.

Example: Using the ALL Value in a List Box With the onafterload Event

```
function listbox1_onafterload(event) {
    alert(IbComposer_isSelected(ctrl.id,'ALL'));
}
```

Function: IbComposer_showLayer

IbComposer_showLayer shows or hides the specified layer.

Syntax: How to Show or Hide a Layer

IbComposer_showLayer(layerName,bShow);

where:

layerName

Alphanumeric

Is the name of the layer, which will be shown or hidden.

bShow

Is an operator that can be set to true to show the layer or false to hide it.

Example: Showing or Hiding a Layer

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    IbComposer_showLayer('Customers','true');  
}
```

Function: IbComposer_toggleLayer

IbComposer_toggleLayer toggles the visibility of the specified layer.

Syntax: How to Toggle Layer Visibility

```
IbComposer_toggleLayer(mapId,layerName);
```

where:

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

layerName

Alphanumeric

Is the unique identifier of a layer within the map. For example, Layer1.

Example: Toggling Layer Visibility

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    IbComposer_toggleLayer('mapcontrol1','Customers');  
}
```

Function: IbComposer_toggleMarker

IbComposer_toggleMarker toggles the visibility of the specified marker.

Syntax: How to Toggle Marker Visibility

```
IbComposer_toggleMarker(mapId, layerName, markerName) ;
```

where:

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

layerName

Alphanumeric

Is the unique identifier of a layer within the map. For example, Layer1.

markerName

Alphanumeric

Is the unique identifier of a marker within the map. For example, redpin.

Example: Toggling Target Marker

```
function button1_onclick(event) {
    var eventObject = event ? event : window.event;
    var ctrl = eventObject.target ? eventObject.target :
    eventObject.srcElement;
    // TODO: Add your event handler code here
    IbComposer_toggleMarker('mapcontrol1', 'Stores', 'EMart');
}
```

Function: IbComposer_refreshLayer

IbComposer_refreshLayer refreshes the specified layer from the database.

Syntax: How to Refresh a Layer

```
IbComposer_refreshLayer(mapId, layerName) ;
```

where:

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

layerName

Alphanumeric

Is the unique identifier of a layer within the map. For example, Layer1.

Example: Refreshing the Layer

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    IbComposer_refreshLayer('mapcontrol1','Customers');  
}
```

Function: IbComposer_panToAddress

IbComposer_panToAddress allows the user to pan to the point on a map for the specified address and zoom level.

Syntax: How to Pan to an Address

```
IbComposer_panToAddress(address,mapId,zoom);
```

where:

address

Alphanumeric

Is the address you want to pan to. For example, 2 Penn Plaza New York NY 10001.

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

zoom

Integer

Is how much you wish to zoom. For example, 7.

Example: Panning to an Address

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    IbComposer_panToAddress('2 Penn Plaza,NY,NY','mapcontrol1',10);  
}
```

Function: ibComposer_panToPoint

ibComposer_panToPoint allows the user to pan to the point on a map for the specified coordinates and zoom level.

Syntax: How to Pan to a Point

```
ibComposer_panToPoint( lat , long , mapId , zoom ) ;
```

where:

lat

Integer

Is the latitude coordinate of the point you want to pan to. For example, 40.7663277.

long

Integer

Is the longitude coordinate of the point you want to pan to. For example, -73.9920777.

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

zoom

Integer

Is how much you wish to zoom . For example, 7.

Example: Panning to a Point

```
function button1_onclick(event) {
    var eventObject = event ? event : window.event;
    var ctrl = eventObject.target ? eventObject.target :
    eventObject.srcElement;
    // TODO: Add your event handler code here
    IbComposer_panToPoint(37.0625,-95.677068,'mapcontrol1',5);
}
```

Function: IbComposer_showAllMarkers

IbComposer_showAllMarkers displays all markers for the specified layer.

Syntax: How to Show All Map Markers

```
IbComposer_showAllMarkers( mapId , layerName ) ;
```

where:

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

Example: Showing All Map Markers

```
function button1_onclick(event) {  
    var eventObject = event ? event : window.event;  
    var ctrl = eventObject.target ? eventObject.target :  
    eventObject.srcElement;  
    // TODO: Add your event handler code here  
    IbComposer_showAllMarkers('mapcontrol1', 'Customers');  
}
```

Function: IbComposer_drawBullseye

IbComposer_drawBullseye draws a bullseye at a point on the map. This function has optional parameters to select whether to display markers, the units of measure used for the bullseye, the number of rings, the size of the rings, and the color of the rings.

Syntax: How to Draw a Bullseye

```
IbComposer_drawBullseye(mapId,lat,long,selectmarkers,units,rings,[list-of-sizes],  
[list-of-colors]);
```

where:

mapId

Alphanumeric

Is the unique identifier of the map control. For example, mapcontrol1.

lat

Integer

Is the latitude coordinate of the point you want to pan to. For example, 40.7663277.

long

Integer

Is the longitude coordinate of the point you want to pan to. For example, -73.9920777.

selectmarkers

Boolean

Is an operator that, when set to true, selects all markers within the Bullseye.

units

Alphanumeric

The unit of measure for the Bullseye rings. For example, mi for miles.

rings

Integer

The number of rings the bullseye uses. For example, 3.

list-of-sizes

Integer

Is an optional parameter, as a comma (,) separated list of sizes for the bullseye rings. For example, 1, 3, 5.

list-of-colors

Alphanumeric

Is an optional parameter, as a comma (,) separated list of colors for the bullseye rings. The colors can be RGB values or hexadecimal values. For example, Blue or #FFFF.

Example: Drawing a Bullseye

```
function button1_onclick(event) {
    var eventObject = event ? event : window.event;
    var ctrl = eventObject.target ? eventObject.target :
        eventObject.srcElement;
    // TODO: Add your event handler code here
    IbComposer_drawBullseye('mapcontrol1',37.0625,-95.677068,'true','mi',3);
}
```

Creating Responsive Web Pages

Responsive web design is an approach to webpage creation where content automatically realigns to fit a variety of different window sizes and screen sizes. This allows the content from one HTML file to automatically adapt to multiple footprints such as a desktop, laptop, tablet, or smartphone.



Unlike a generic HTML page, the containers in a responsive page reorder automatically as the screen size changes. Where a generic page shows partial content with a horizontal scroll bar, the responsive page shows full content, re-ordered, with no horizontal scroll bar.

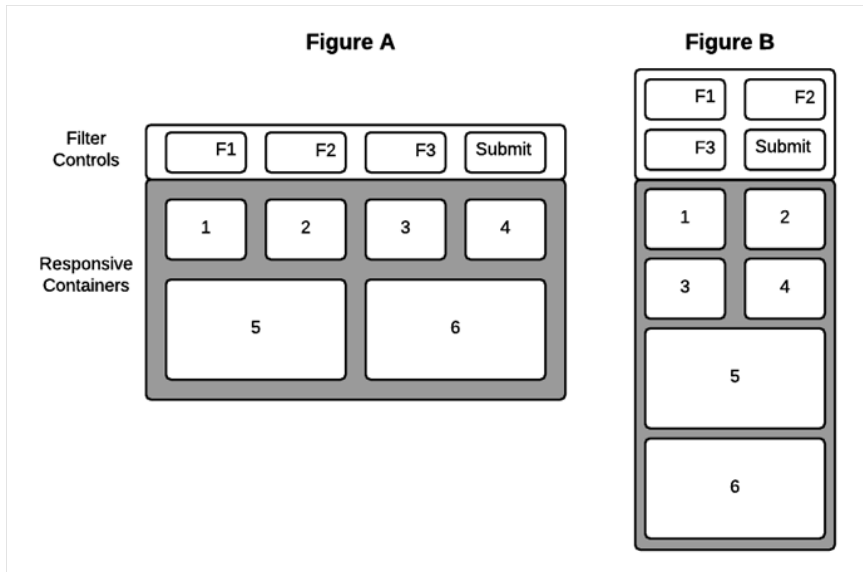
How Responsive Containers Fold

The behavior that makes a page responsive is called “folding.” This section details the way responsive containers fold, or re-arrange, as screen size changes. The order in which responsive containers fold is illustrated in the following image.

Figure A illustrates a responsive layout with a row-based 4-2 format, meaning there are four containers on row one and two containers on row two.

Figure A also illustrates the filter row, containing four controls. At run time, the filter row can either be hidden or displayed.

Figure B illustrates the way containers fold responsively when the screen width decreases. The content in each container resizes accordingly, as the screen width changes.



Note: Objects within a responsive container are positioned absolutely. That is, they do not fold. Responsive containers fold in relation to one another, but the objects inside the containers remain fixed.

Objects inside responsive containers can scale to defined limits, as detailed in [How to Set Minimum and Maximum Panel Sizes](#) on page 600. However, the objects within a container will not fold.

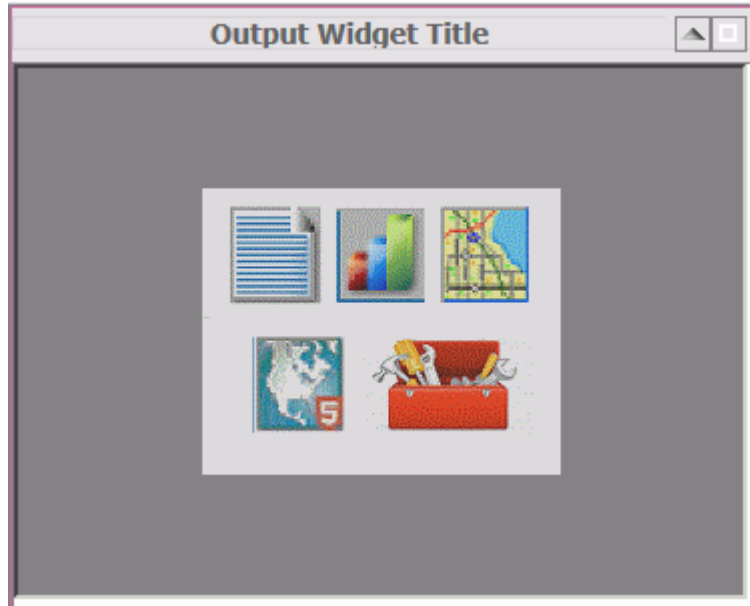
Selecting a Responsive Method

There are three ways to create responsive pages in App Studio: using a Responsive Template, using the HTML Canvas in Responsive Mode, and using a Responsive Grid.

1. **Using a Responsive Template.** This method lets you create a page by populating responsive Output Widget containers in a pre-defined template or a layout that you create at design time. You use the HTML/Document wizard to specify a layout that is either row-based or column-based.

Key Characteristics

The Output Widget container, shown in the following image, is the key characteristic of a Responsive Template.



The Output Widget container has the following features:

- ❑ **Title Bar.** Including an editable text title.
- ❑ **Image.** Such as a company logo, that can be inserted on the left side of the title bar.
- ❑ **Arrow Toggle.** On the right side of the title bar, to display or hide widget-level controls.
- ❑ **Expand Toggle.** On the right side of the title bar, to make the widget contents display full screen or original size.

If you want to create a responsive page with one or more Output Widget containers, the Responsive Template method is the most efficient approach. This method is used only for creating new responsive HTML files. For more information, see [Creating a Page with a Responsive Template](#) on page 591.

2. **Using the HTML Canvas Responsive Mode.** This “free form” method lets you create a responsive page with no pre-defined layout. This manual approach is perhaps not as fast as using a template, but may be preferable if you want to create a responsive page with containers of many different types.

This method can also be used to convert an existing HTML file to responsive. For more information, see [Creating a Page with the HTML Canvas in Responsive Mode](#) on page 603.

3. **Using a Responsive Grid Container.** This method lets you create a page by populating responsive Panel containers in a grid layout that you create at design time. You can use the Responsive grid configuration pop up window to specify a number of rows, and a number of panels per row.

Key Characteristics

The Panel container is the key characteristic of the Responsive Grid Container. Unlike the feature-rich Output Widget container, the panel is a more basic container. It appears as a simple box in the HTML canvas. This container may be preferable if your content does not use controls or if you do not need a title for each container.

If you want to create a responsive page with one or more Panel containers, the Responsive Grid Container is the most efficient tool. This method can also be used to convert an existing HTML file to responsive. For more information, see [Creating a Page with a Responsive Grid Container](#) on page 608.

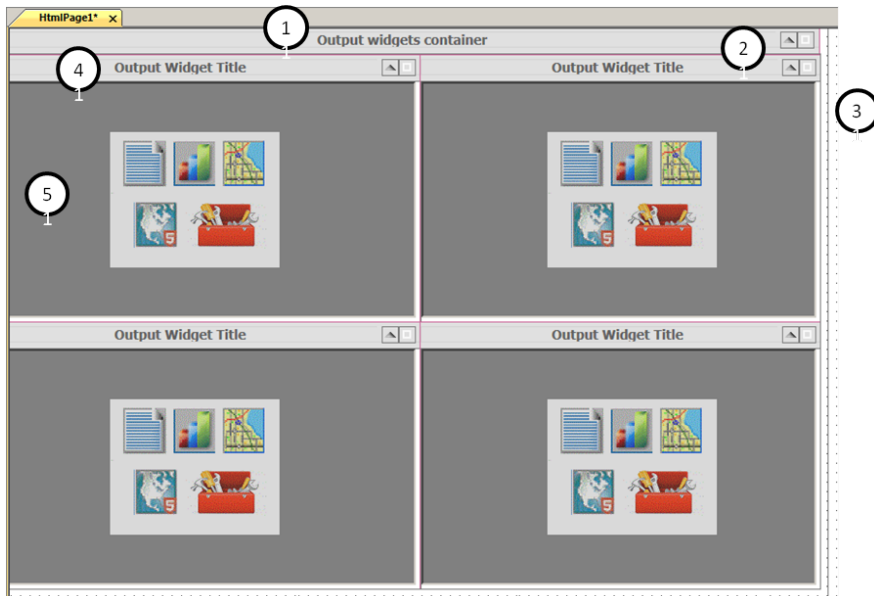
Creating a Page with a Responsive Template

There are six pre-defined responsive templates available through the HTML/Document Wizard. These represent the most commonly used page layouts. You can use the layout from a template as-is, or modify the layout further after initiating it with a template.

As an alternative to using a pre-defined template, the HTML/Document Wizard allows you to create a custom page layout at design time. You can specify the number of rows and columns, and whether the page has a row- or column-based orientation. These and other page options are detailed in the following sections.

Understanding Responsive Templates

When you select a responsive template from the HTML/Document Wizard, it generates a responsive layout with the specified number of rows (or columns) and widget containers. The parts of the responsive layout are highlighted in the following image, which was generated using the 2-2 responsive template. The image is annotated numerically with corresponding properties and explanations appearing below.



Document. Although not enumerated in the previous image, a responsive template generates an HTML document that includes the following responsive properties, editable in the Properties panel:

- ☐ **Load as iFrame object.** To load the entire page as a widget (a single DIV item) for use in a BI Portal. The default value for this property is *No*.
- ☐ **Responsive: min width.** Sets the minimum width (in pixels or percentage) beyond which the page size cannot be decreased. The default minimum width is 320 pixels.
- ☐ **Responsive: max width.** Sets the maximum width (in pixels or percentage) beyond which the page will not rescale larger. This also defines the width of the canvas at design time. This limit is indicated by a black vertical line on the right side of the canvas, as shown in item 3 in the previous image. The default maximum width is 1500 pixels.

At run time, the layout populates the full browser.

- ❑ **Container alignment.** Sets the alignment of containers within the page to the left (default) or centered.

1. Main Widget. Defined as windowPanel1 <DIV> in the Properties panel, the default title is *Output widgets container*.

- ❑ **Template configuration.** Displays the current layout. You can type in a new number to change the layout. For example, if you began with a 2-2 template, but want three widgets in the second row, change this value to 2-3.

Note: The maximum number of widgets in a row is 8.

- ❑ **Template orientation.** Determines if the content folds by row or by column. The default orientation is *Row-based*. To change this, you can select *Column-based*.
- ❑ **Widget Title.** You can delete the default and type the desired title for the widget that encompasses the entire page contents.
- ❑ **Auto-hide inputs panel.** The row of controls used to filter the content for the page is hidden by default. To always display the row of controls, select *No*.

2. Widget display buttons. The page, and each widget within it, has two buttons in the upper-right corner: an arrow and a box. Toggle the arrow to display or hide the row of controls. Toggle the box to expand a widget to full screen or return it to original size.

3. Vertical design boundary. This is a visual indicator on the far right side of the canvas that shows the responsive maximum width set in the Properties panel for the document. The default is 1500 pixels.

4. Widget Title. Defined as windowPanel2 <DIV> in the Properties panel (for the first widget), the default widget title is *Output Widget Title*. You can delete the default and type the desired widget title in the Properties panel. At design time, a red box appears around the widget title and contents to indicate a responsive container.

5. Widget contents. Defined as iframe1 <IFRAME> in the Properties panel (for the first widget), you can right-click to add content to the widget through the following shortcut menu:

- ❑ **New Report.** To create a new report in the widget.
- ❑ **New Chart.** To create a new chart in the widget.
- ❑ **New Document.** To create a new document in the widget.
- ❑ **Import existing.** To import an existing procedure into the widget.
- ❑ **Reference existing procedure.** To reference an existing procedure in the widget.

- ❑ **Map.** To create a new map control in the widget.
- ❑ **ESRI.** To create a new emf object in the widget.
- ❑ **Use as Toolbox.** A general option to use the widget as needed. For example, you may decide to create a button to execute an action.

The content in pages derived from a responsive template loads in the following order at run time: left to right - top to bottom.

To add a header to your responsive page, right-click in the title bar and select *Add page header* from the shortcut menu. Alternatively, you could use the Add page header option in the HTML/Document Wizard, as detailed in the following procedure.

Procedure: How to Select a Responsive Template

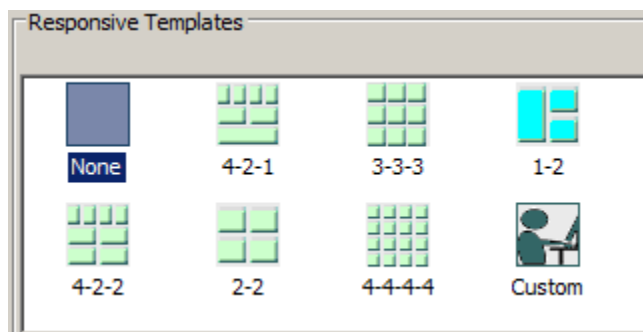
Select a responsive template from the HTML/Document Wizard as follows:

1. Open the HTML/Document Wizard using one of the following methods:
 - a. On the Home tab, in the Content group, click *HTML/Document*; or
 - b. In the Environments Tree panel, right-click an application folder, click *New*, and click *HTML/Document*.

The HTML/Document Wizard opens. If you used option **a.** above, the HTML/Document Wizard contains a navigation window that you can use to specify the folder where you want to save the new file.

2. Click *Next*.

The Templates, Settings, and Themes page opens, containing the Responsive Templates section, as shown in the following image.



3. Click on a desired responsive template.
 - ❑ Selecting *None* results in a generic HTML canvas that is not responsive.

- ❑ Selecting *Custom* lets you design a layout that differs from those offered by the responsive templates. For more information, see [How to Create a Custom Layout](#) on page 602.

For purposes of this procedure, do not select *None* or *Custom*.

4. Use the Input Controls section at the bottom of the page as follows:
 - ❑ Select *Auto-hidden* to hide the controls input panel. This is the default. At run time, users display the panel by clicking the down arrow in the title bar.
 - ❑ Select *Always show* to display the controls input panel. At run time, users hide the panel by clicking the up arrow in the title bar.
 - ❑ Clear the check box for *Use a single input control panel* if you want to use widget-level controls instead of, or in addition to, page-level.
5. Select *Run requests on load* to load the contents of all the widgets when the page first opens.
6. Select *Add page header* if you want to add space above the title bar, within the responsive panel1 <DIV>. You could use this area to add a graphic and/or company logo, for example.
7. Click *Finish* to close the HTML/Document Wizard.

The HTML canvas opens with the automatically generated responsive layout corresponding to the selected template.

Note: It is a best practice to expand App Studio to full screen when working with a responsive layout. This lets you access the greatest number of widgets without having to scroll.

Reference: Populating Widgets in a Responsive Template

A layout generated by a responsive template contains blank widgets in responsive containers. This section contains guidelines for editing and adding objects to widgets.

- ❑ To add content to a header, click the desired element from the Components tab and drag and drop it on the header area to define it.

To increase the height of a page header, click the Title Bar and drag it down to expose more room above it. Click the header area to highlight the responsive red box. Drag the lower border of the red box down to increase the height of the header.

- ❑ To change a widget title, click the default title *Output Widget Title* and open the Properties panel. In the Widget Title field, type the new widget title.

- ❑ To display an image in the top left corner of a widget title bar, set the Display image value to Yes. Use the Image source field to lookup the desired image file.
- ❑ To add objects to a widget, right-click in the widget to display the shortcut menu. Click the desired object type, for example, Report, Chart, Document, Map, etc. You can create new content in the widget, import existing content, or reference existing content.

Note: When using a layout generated by a responsive template, you can not add objects to the canvas outside the layout.

- ❑ To add multiple objects to a widget, drag the additional object from the ribbon to the widget. For example, on the Home tab, Content group, click the Report button and drag it to a widget that already contains an object, and drop it. A box is automatically drawn within the widget to contain the new report object.
- ❑ To set an equal margin around all four sides of a widget, enter a number of pixels in the Margin property for the widget <IFRAME>.
- ❑ To move contents from one widget to another, click the Positioning tab and, in the Responsive Design group, click *Toggle Selection*. Drag contents between widgets as needed and click *Preview Runtime*, on the Utilities tab.

Procedure: How to Add or Remove a Widget

You can change the layout of your responsive page at design time by adding or removing a widget, as detailed below.

1. Open a responsive HTML page.
2. To add a widget, use one of the following methods:
 - a. Select a widget next to the location where you want to add a new one. Right-click on the title bar of that widget and select *Insert new widget before* or *Insert new widget after* from the shortcut menu.

The new widget is added.

- b. Alternatively, you can right-click on the title bar of the HTML page and select *Template configuration...* from the shortcut menu. The Template Configuration dialog box shows the row (or column) numeric configuration. For example, 3-2.

Change the numeric configuration to include the new widget. For example, to add a new widget to the second row, change the value to 3-3.

The new widget is added.

3. To remove a widget, use one of the following methods:
 - a. Select a widget that you want to remove. Right-click on the title bar of that widget and select *Delete* from the shortcut menu.
The widget is removed.
 - b. Alternatively, you can right-click on the title bar of the HTML page and select *Template configuration...* from the shortcut menu. The Template Configuration dialog box shows the row (or column) numeric configuration. For example, 3-2.
Change the numeric configuration to reduce the number of widgets. For example, to remove a widget from the first row, change the value to 2-2.
The widget is removed.

Procedure: How to Add an Additional Object to a Widget

You can put more than one object (such as a report or chart) in an output widget, as detailed in this procedure.

Note: A widget that contains a map will not accept an additional object.

1. Click an object that has already been added to a widget.
 - ❑ If the widget contains a report or chart, you can add another report or chart, but not any other type of object.
 - ❑ If the widget contains a toolbox, you can add an additional report or chart, but it will not have the Autosize option set by default. You must set this option manually.

Open the Properties panel to verify that the IFRAME is selected.
2. On the Components tab, click the object that you want to add. For example, Report or Chart.
The widget can be divided vertically (with the two objects, side by side) or horizontally (with the two objects one above the other). Move your cursor to the right or left side, or the top or bottom of the widget.
The existing content automatically moves to the opposite side of your cursor.
3. Click on the side where you want to insert the new object.
The widget is automatically divided into two equal columns or rows. The side you selected contains the report or chart icon.
4. Right-click the icon and select the desired option from the shortcut menu to create the new object. For example, Reference existing procedure.

5. Click the widget title bar and open the Properties panel. The Number of columns property defaults to **Auto**. Use the drop-down menu to select the number of columns you want in the widget. Select **2** if you have two objects side by side. Select **1** if you have two objects, one above the other.

Run the page to preview widgets that have multiple objects to be sure the content remains legible.

Procedure: How to Apply Page-Level Controls in a Responsive Page

You may often have a responsive page that contains multiple reports that use the same controls. For example, if users can select region and month, they may want to show the same region and month selection for multiple reports in the page. In this case, you can apply common controls at the page level.

Your page can also include one or more reports that use controls that differ from the common ones. In this case you can apply additional controls at the widget level, as defined in [How to Apply Widget-Level Controls in a Responsive Page](#) on page 599.

This procedure details how you apply controls at the page level.

1. Create multiple reports or charts that use the same controls and add them to widgets in a responsive layout as detailed in [How to Select a Responsive Template](#) on page 594.

When you add a report with controls to a widget, the New Parameters dialog box opens. You can use this dialog to chain controls together. Chaining lets you filter control values based on the selected value from the prior control in the chain. For example, if State and City controls are chained, the City values will be filtered to show only cities in the selected state.

For more information see [Chaining in the HTML Canvas](#) on page 557.

2. Run the page. Note that:
 - ☐ The control names and values are appended to the page title in the title bar.
 - ☐ The controls input panel does not display. This is the default.
3. Click the down arrow in the right corner of the title bar to display the controls input panel.
Close the HTML output and return to the HTML canvas.
4. If you want the controls input panel to display when the page opens:
 - a. Click the title bar and open the Properties panel.
The properties for windowPanel1 <DIV> are displayed.
 - b. Change the Auto-hide inputs panel value to *No*.

- c. Run the page. Note that the controls input panel now does display.

The selections that the user makes in the controls input panel are automatically applied to all the reports on the page that share the controls.

Procedure: How to Apply Widget-Level Controls in a Responsive Page

You may often have a responsive page that contains multiple reports that use the same controls. For example, if users can select region and month, they may want to show the same region and month selection for multiple reports in the page. In this case you can apply common controls at the page level, as defined in [How to Apply Page-Level Controls in a Responsive Page](#) on page 598.

Your page can also include one or more reports that use controls that differ from the common ones. In this case you can apply additional controls at the widget level.

This procedure details how you apply controls at the widget level when different controls are used at the page level.

1. Open a responsive HTML file that uses page-level controls, such as the one created in [How to Apply Page-Level Controls in a Responsive Page](#) on page 598.

Add a new widget to a row as detailed in [How to Add or Remove a Widget](#) on page 596.

2. Create a report or chart that uses controls and add it to the new widget. For purposes of this procedure, use different controls than the ones used in the other reports in this page.

When you add a report with controls to a widget, the New Parameters dialog box opens. By default, this dialog is set to create a control. Click *OK*.

3. Run the page. Note that the controls input panel displays in the new widget by default.

4. To hide the controls input panel in a new widget:

- a. Add a new widget to a row as detailed in [How to Add or Remove a Widget](#) on page 596. Add the report you created in Step 2 to the new widget.

The New Parameters dialog box opens.

- b. In the Parameter grouping options field select *New single layer form* and click *OK*.

The New Parameters dialog box closes. The input panel is hidden.

The selections that the user makes in the controls input panel at the page level are automatically applied to all the widgets on the page that share controls. Additionally, the user can make a selection in the independent widget that does not share controls.

Procedure: How to How to Animate the Controls Input Panel

Creating a page with a responsive template enables you to add animation that appears when a user opens or closes a controls input panel at run time. This consists of creating and naming an animation, then applying it to the window panel that corresponds with the input controls, as detailed below.

1. Open an HTML page that was a) created with a responsive template; and b) contains input controls.
2. Open the Tasks & Animations panel. In the JQuery Animations section, click the New button.

The system gives the new animation a default name. For example, *Animation1*. If you wish to rename the animation, click the default name and type the new name.

Note: It is not necessary to specify a selected target for the animation. Leave this field blank.

3. In the Effect section, use the drop-down menu in the Type field to select an animation. If you wish, you may select an Option and Value to apply to the selected animation.
4. At the bottom of the panel, click Toggle animation.
The animation is ready to be applied to the window panel.
5. In the responsive layout, click the title bar under which the control input panel appears.
6. Open the Properties panel. In the Output Widget section, click the Select animation field. Use the drop down menu to highlight the desired animation name. For example, *Animation1*.
7. Run the HTML page. Use the up/down arrow button on the title bar to see the animation when you hide/reveal the controls input panel.

Procedure: How to Set Minimum and Maximum Panel Sizes

Responsive panels automatically resize as the viewing window changes, but panels do not have a default minimum or maximum size. You can set minimum or maximum size, in pixels or percentages, to best suit the panel contents, as follows.

Note: Panels in a responsive page resize within the context of the minimum and maximum page width. To view or edit these values, open the Properties panel and select DOCUMENT from the drop-down menu at the top of the panel. For Responsive: min width, the default is 320px. For Responsive: max width, the default is 1500px.

1. Click a responsive panel that contains controls, or click the title bar of a widget, and open the Properties panel.

The Properties panel for the panel <DIV> includes the following properties: Min-width, Max-width, Min-height, and Max-height. These values are blank by default.

2. You can manually type a number of pixels or a percentage. For example, 50px or 50%.

Alternatively, you can use the shortcut menu as follows:

3. Right-click a responsive panel that contains controls, or right-click the title bar of a widget. From the shortcut menu, select *Update Sizes*.

The Update Sizes shortcut menu displays.

Select Update minimum size to populate the Min-width and Min-height properties with the number of pixels or percentages used by the selected container. In other words, the container will not scale smaller than the size shown in the responsive layout.

Note: Update minimum size does not change the object size in design time, but it does change the size in run time.

Select *Use Current* to use sizes from the selected container as follows:

- ☐ **Size as min size.** To populate the Min-width and Min-height properties with the number of pixels used by the selected container.
- ☐ **Size as max size.** To populate the Max-width and Max-height properties with the number of pixels used by the selected container.
- ☐ **Height as min height.** To populate the Min-height property with the number of pixels used by the selected container.
- ☐ **Width as min width.** To populate the Min-width property with the number of pixels used by the selected container.
- ☐ **Height as max height.** To populate the Max-height property with the number of pixels used by the selected container.
- ☐ **Width as max width.** To populate the Max-width property with the number of pixels used by the selected container.

Procedure: How to Load a Widget at Run Time

In some cases, the content you add to a widget might not load at run time, leaving the widget blank. This could occur if you did not select the *Run requests on load* option from the HTML/Document wizard, or if you added a new widget to a layout.

To cause widget content to load at run time:

1. Open the Tasks & Animations panel and select the Load Task, and the Load Trigger Type.
2. In the Requests/Actions section, click the down arrow next to the Add Request button.

The shortcut menu is displayed.

3. Select *Run Request* and then select an iframe, for example *iframe2*.

The iframe is added to the Requests/Actions field and is highlighted.

4. In the Target Type field, select *Frame*. In the Target/Template field, select the iframe that corresponds to the one that is highlighted, for example *iframe2*. Run the page.

The content loads at run time.

5. Repeat these steps for all the iframes in your page that do not load at run time.

Procedure: How to Create a Custom Layout

In the HTML/Documents Wizard, the Templates, Settings, and Themes page includes six responsive templates that represent the most commonly used layouts. You can use these layouts as-is, or use them as a point of departure for a modified layout that contains more or fewer widgets. For more information, see [How to Add or Remove a Widget](#) on page 596.

Instead of using a template, you can create a custom layout, as detailed in this procedure.

1. Open the HTML/Document Wizard using one of the following methods:
 - a. On the Home tab, in the Content group, click *HTML/Document*; or
 - b. In the Environments Tree panel, right-click an application folder, click *New*, and click *HTML/Document*.

The HTML/Document Wizard opens. If you used option **a.** above, the HTML/Document Wizard contains a navigation window that you can use to specify the folder where you want to save the new file.

2. Click *Next*.

The Templates, Settings, and Themes page opens, containing the Responsive Templates section.

3. In the Responsive Templates section, click *Custom*. Click *Finish*.

The layout opens and the Template configuration dialog is activated.

4. In the Orientation field, select *Row-based* or *Column-based*.
5. Use the Select row number and Number of containers in a row field as follows:

- a. With number 1 showing in the Select row number field, use the drop down list in the Number of widgets in a row field to specify the number of widgets you want in row 1.

Note: Use the drop down list. Do not type in the field.

- b. Select 2 in the drop down list in the Select row number field.
- c. Use the drop down list in the Number of widgets in a row field to specify the number of widgets you want in row 2.
- d. Repeat this sequence as needed to define your custom layout.

Close the Template configuration dialog.

6. Define the page-level behavior of input controls as follows:

- ☐ In the Properties panel for windowPanel1 <DIV>, set Auto-hide inputs panel to Yes. At run time, users reveal the panel by clicking the down arrow in the title bar. This controls page-level behavior.
- ☐ In the Properties panel for windowPanel2 <DIV>, set Auto-hide inputs panel to Yes. At run time, users reveal the panel by clicking the down arrow in the title bar. This controls widget-level behavior. Repeat this for each widget for which you want to use widget-level controls.
- ☐ Select No to display the controls input panel. At run time, users hide the panel by clicking the up arrow in the title bar.

7. To add a page header, right-click in the title bar of the page and select *Add page header* from the shortcut menu. You could use this area to add a graphic and/or company logo, for example.

Creating a Page with the HTML Canvas in Responsive Mode

This “free form” method lets you create a responsive page with no pre-defined layout. This manual approach is perhaps not as fast as using a template, but may be preferable if you want to create a responsive page with containers of many different types.

This method can also be used to convert an existing HTML file to responsive.

Procedure: How to Create New Content in Responsive Mode

You can create new responsive content using the HTML canvas in responsive mode, as defined in this procedure.

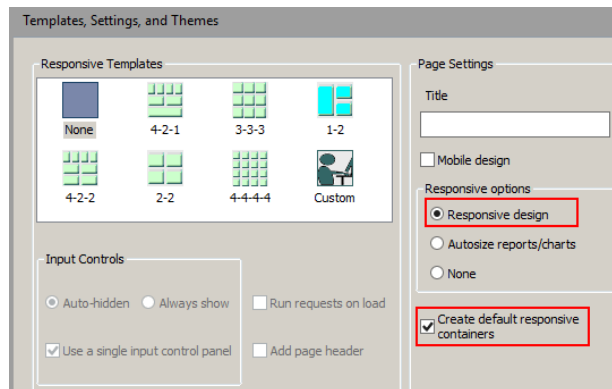
1. Open the HTML/Document Wizard using one of the following methods:

- a. On the Home tab, in the Content group, click *HTML/Document*; or
- b. In the Environments Tree panel, right-click an application folder, click *New*, and click *HTML/Document*.

The HTML/Document Wizard opens.

2. Click *Next*.

The Templates, Settings, and Themes page opens, containing the Page Settings section, as shown in the following image.



3. In the Page Settings section, select *Responsive design*.

Note the *Create default responsive containers* option is selected. This automatically adds a responsive container, indicated by a red box, around each object you add to the HTML canvas. De-select this option if you want to suppress the responsive containers. Responsive containers can be added manually at any time.

Click *Finish*.

The HTML canvas opens. In the Properties panel, in the DOCUMENT properties, the Responsive design value is set to Yes.

As an alternative to using the HTML/Document Wizard, you can open a file in the HTML canvas and manually change the Responsive design property value to Yes.

You can add content to the HTML canvas before turning Responsive Design on. However, there are advantages to turning Responsive Design on before adding content. Design time benefits include:

- ❑ Having the responsive minimum and maximum widths established
- ❑ Having the maximum width visually indicated by the horizontal line on the right side of the canvas

- ❑ Having the Preview Runtime capability to preview the run-time appearance

Procedure: How to Convert an HTML File to Responsive

1. To enable responsive behavior in an existing HTML file, double-click the file in the Environments Tree panel, or right-click it and click *Open*.

The HTML file is open in the HTML canvas.

2. In the Properties panel, select *DOCUMENT* from the drop-down menu.

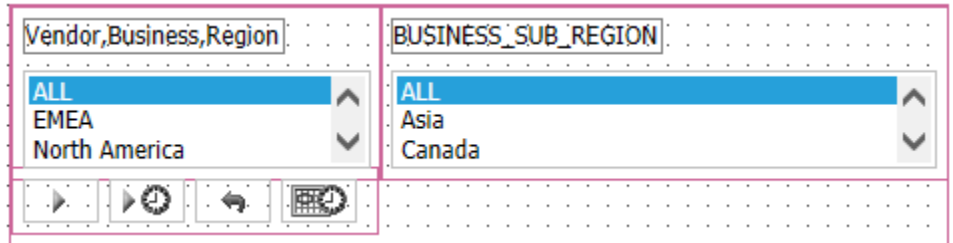
The Document properties are displayed.

3. In the Responsive design property, select *Yes* from the drop-down menu.

A message appears asking of you want to group control elements into responsive containers.

4. Indicate your preference for responsive containers as follows:

- a. Click *Yes* to add multiple containers in the control area as shown in the following image.



Note there are three containers within the fourth, larger container. The containers are red, indicating that they are responsive.

- b. Click *No* to add no containers. This may be preferable if your page contains many nested objects, otherwise each object will get its own container.

You can add additional containers at a later time:

1. Multi-click the control objects you want to group in a container.
2. Right-click one of the highlighted objects and select HTML object manipulation from the shortcut menu.
3. Select *Merge containers*.
4. To make a frame responsive, select it and open the Properties panel. Set the Enable responsive property value to *Yes*.

The HTML canvas is now in responsive mode. The frames and controls on your HTML canvas are each enclosed in a responsive container, indicated by a red box.

Note: if the HTML file had the Autosize Children option enabled, it will be superceded by the new responsive behavior, which automatically controls sizing.

Two additional responsive properties appear in the Properties panel, whose values you may edit:

- ❑ **Responsive: min width.** Elements will not be repositioned or resized if the width of the container is less than this minimum, specified in pixels or percentage.
- ❑ **Responsive: max width.** Elements will not be repositioned or resized if the width of the container is greater than this maximum, specified in pixels or percentage.

A black vertical line appears on the right side of the HTML canvas in responsive mode, as a visual indicator of the responsive maximum width. You may need to scroll right to see this line.

5. To move contents from one container to another, click the Positioning tab and, in the Responsive Design group, click *Toggle Selection*. Drag contents between containers as needed and click *Preview Runtime*, on the Utilities tab.
6. Click the Run button on the Application menu and view the HTML output full screen. Gradually decrease the width to observe the responsive folding.

Procedure: How to Restrict the First Row to Controls Only

When you create a page with a responsive template, the first row of the page is automatically restricted to input controls (when applicable). Content such as reports or charts will not fold up to populate the first row, regardless of how wide the browser may stretch at run time.

When you create a page using the HTML canvas in responsive mode, this restriction is not automatic. Therefore a report or chart could fold up to populate the first row, if the browser width is increased. This behavior may be considered undesirable.

Ensure that the first row contains controls only, as follows:

1. Open an HTML page that was a) created with the HTML canvas in responsive mode; and b) contains input controls.
2. Verify that the input controls are all grouped within a single container. If not:
 - a. Hold down the CTRL key and multi-select all the controls.
 - b. Right-click on one of the controls and select HTML object manipulation.
 - c. From the shortcut menu, select *Add selected to new container*.

Note that a box appears that contains all the selected controls. The box is red, indicating it is responsive.

3. Click the new container and open the Properties panel. In the Min-width property, enter the value of *100%*.

This assures that the first row contains controls only.

4. Run the page and make the browser the full width of the screen to test the folding.

Procedure: How to Create a Responsive Page for Use in a BI Portal

The WebFOCUS BI Portal gives users access to BI content, including dashboards, visualizations, reports, charts, graphs, maps, and interactive InfoApps. The BI Portal allows users to analyze vital information quickly, link content and reports together, and easily tailor information to their needs.

This procedure is comprised of two parts: creating a report for use in the responsive portal and creating a responsive HTML page using the HTML canvas.

1. Select or create a report with the following criteria:
 - ☐ Has dynamic parameters specified in a WHERE clause.
 - ☐ Has `_FOC_NULL` as the default.
 - ☐ Has a parameter that is a Multiselect OR.
 - ☐ Has a value of *No* in the File/Folder Properties panel - Prompt for Parameters property.
2. Create a responsive HTML page as follows:
 - a. Open the HTML/Document Wizard from the Home tab, Content group, or from the shortcut menu in the Environments Tree panel. Click *Next*.
The Templates, Settings, and Themes page opens.
 - b. In the Page Settings area, click Responsive design and click *Finish*.
The HTML canvas opens. In the Properties panel, in the DOCUMENT properties, verify that the Responsive design and Load in iFrame object properties are set to Yes.
The Load in iFrame object property is used to enable objects in a BI Portal to overlap the edges of a container. For example, when you have a pop-up calendar that populates a date field, the calendar can overlap the control container to allow the user to select a date.

Note: The Load in iFrame object property creates a <DIV> for the page instead of an <iFrame> tag. A BI Portal is limited to only one HTML Canvas page that is enclosed in a <DIV> tag.

Note that the Responsive: min width is set to 320px and the Responsive: max width is set to Full screen. These default values can be edited in pixels or percentages.

- c. In the Requests and Data sources panel, click the drop down arrow next to the New icon, and select the option Requests-Parameters-Filter Panel.

The Open File dialog opens.

- d. Select the procedure you designated in Step 1 and click OK.

The New Parameters dialog opens.

- e. Click *Autochain controls* in above specified order, and click OK.

The New Parameters dialog closes and the HTML canvas is opened, showing the controls in containers. The red boxes indicate that responsive design is activated.

- f. Open the Tasks & Animations panel and verify that the Submit button (task 2) Requests/Actions value is Refresh1 and the Target Type is Refresh BI Portal.

- g. Right-click the canvas and select *Preview Runtime* or click the *Preview Runtime* button on the Utilities tab. Note that the content expands to the maximum width. The black vertical line on the right side of the canvas is a visual indicator of the specified Full screen max width.

- h. Save the HTML page.

Creating a Page with a Responsive Grid Container

This method lets you create a responsive page by populating Panel containers in a grid layout. You can create the grid in the responsive HTML canvas at design time. You can use the Responsive grid configuration dialog to specify a number of rows, and a number of panels per row.

You can add a responsive grid container to a new responsive page, or convert an existing page to responsive, and add a responsive grid container to it.

Also, you can add a responsive grid container to a blank HTML canvas, or you can draw a grid over existing objects on a populated HTML canvas.

The Responsive Grid container command, shown in the following image, is found on the HTML Canvas, Components tab, in the Containers group.



This container is active only when the Responsive design property for the page is set to Yes.

Procedure: How to Create a Responsive Grid on a Blank Canvas

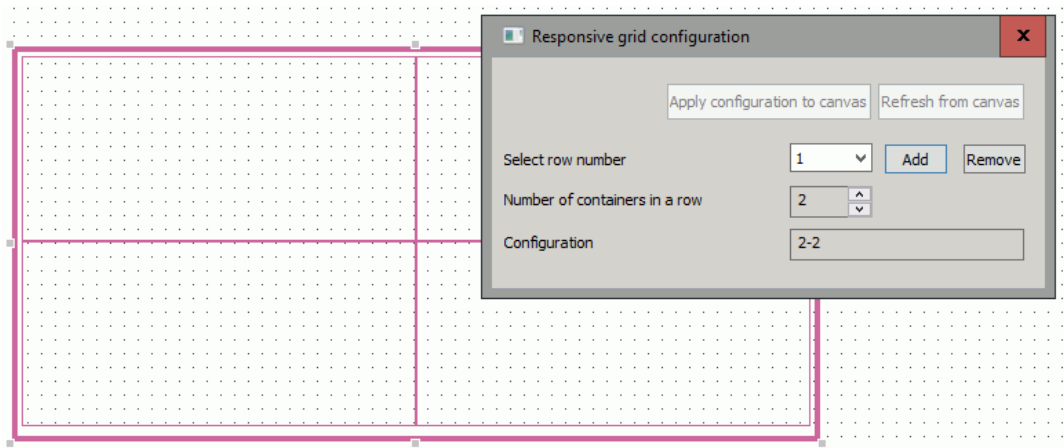
You can add a responsive grid container to a responsive HTML canvas that is blank, or to one that is already populated with objects. This procedure details adding a responsive grid to a blank canvas.

1. Open an existing HTML page or create a new one. Open the Properties panel at the Document level and verify the Responsive design property value is set to Yes.
2. On the Containers tab, click the Responsive Grid container.

The cursor becomes a plus sign.

3. Draw the grid over a blank area on the HTML canvas.

The grid and Responsive grid configuration dialog appear as shown in the following image.



By default, a grid is created that is two rows with two panel containers each. Each container is represented by a box. The grid itself is represented by an outer box, with a heavy line. All the lines are red, indicating responsive containers.

4. Use the Responsive grid configuration dialog to add or remove rows and containers from the grid.

Note: if the Responsive grid configuration dialog is not displayed, right-click the outer grid box and select *Responsive grid configuration...* from the shortcut menu.

- ❑ To add a row at the bottom of the grid, click *Add* in the Responsive grid container dialog.
- ❑ To remove a row, specify the row in the Select row number field and click *Remove*.
- ❑ To change the number of containers in a row, specify the row in the Select row number field. Specify the number of containers using the Number of containers in a row field.

As an alternative to the Responsive grid configuration dialog, you can right-click a container in the grid and use the shortcut menu to select *Insert new container before*, *Insert new container after*, or *Delete*.

The grid now contains the desired number of rows and containers.

5. Apply the grid.

When you insert a responsive grid over a blank area on the HTML canvas, the positioning of the grid is temporary until you apply the grid to the canvas. This is done in one of the following ways:

- ❑ Insert an object, such as a report, on the canvas outside the grid.
 1. Drag the object into one of the responsive grid containers.
 2. Right-click the outer box of the grid to display the shortcut menu.
 3. Select *Apply responsive grid to canvas*.
- ❑ Insert an object, such as a report, into one of the responsive grid containers. This automatically applies the grid to the canvas.

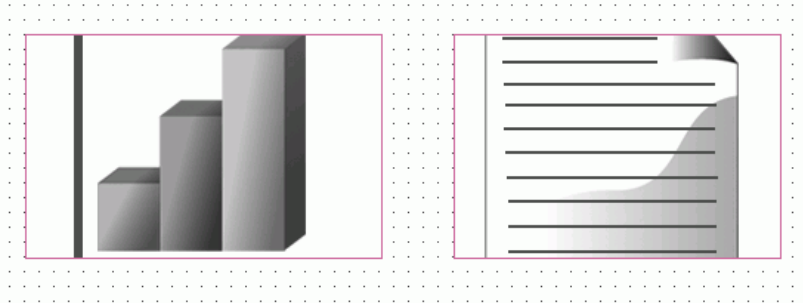
When you select and move a grid that has been applied, the contents inside the grid will move together with the grid. When a grid has not been applied, you can move the grid but the contents remain stationary on the canvas.

Procedure: How to Create a Responsive Grid on a Populated Canvas

You can add a responsive grid container to a responsive HTML canvas that is blank, or to one that is already populated with objects. This procedure details drawing a responsive grid over existing objects on a populated HTML canvas.

1. Open an existing responsive HTML page that is already populated with objects, or create a new responsive page and add objects to it. Verify that the containers are red, indicating responsive design.

The following example shows chart and report objects on a responsive HTML canvas.

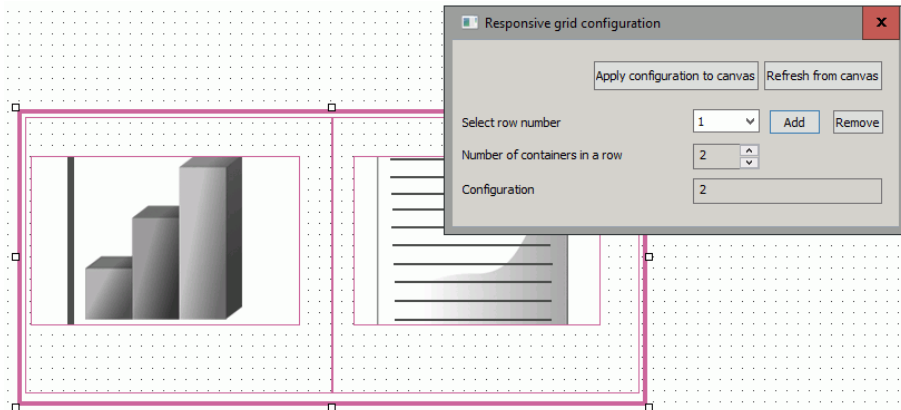


2. On the Containers tab, click the Responsive Grid container.

The cursor becomes a plus sign.

3. Draw a grid that encompasses the objects that you wish to contain in the grid. The grid reads the canvas and creates a corresponding layout.

The following example shows how the responsive grid interpreted the previous example, and created a grid of one row with two containers.



4. Use the Responsive grid configuration dialog to add or remove rows and containers from the grid.

Note: if the Responsive grid configuration dialog is not displayed, right-click the outer grid box and select *Responsive grid configuration...* from the shortcut menu.

- ❑ To add a row at the bottom of the grid, click *Add* in the Responsive grid container dialog.
- ❑ To remove a row, specify the row in the Select row number field and click *Remove*.
- ❑ To change the number of containers in a row, specify the row in the Select row number field. Specify the number of containers using the Number of containers in a row field.

As an alternative to the Responsive grid configuration dialog, you can right-click a container in the grid and use the shortcut menu to select *Insert new container before*, *Insert new container after*, or *Delete*.

The grid now contains the desired number of rows and containers.

5. Apply the grid.

When you insert a responsive grid over a populated area on the HTML canvas, the positioning of the grid is temporary until you apply the grid to the canvas. This is done in one of the following ways:

- ❑ If the Responsive grid configuration dialog is open, click *Apply configuration to canvas*.
- ❑ If the Responsive grid configuration dialog is not open, right-click the outer box of the grid and select *Apply Responsive grid to canvas* from the shortcut menu.

When you select and move a grid that has been applied, the contents inside the grid will move together with the grid. When a grid has not been applied, you can move the grid but the contents remain stationary on the canvas.

Procedure: How to Add an Object to an Existing Responsive Grid

When you draw a responsive grid that encompasses objects that you wish to contain in the grid, the grid “reads” the canvas and creates a corresponding layout. Similarly, you can add an object to an existing responsive grid and have it read the canvas again, and adapt the layout to include the new object.

1. Open an existing responsive HTML page which contains a responsive grid that is populated with objects.
2. Insert an object, such as a report, on the canvas outside the grid.
3. Drag the object into one of the responsive grid containers. Right-click the outer box of the grid to display the shortcut menu.
4. Select *Responsive grid configuration...* from the shortcut menu.

The Responsive grid configuration dialog opens.

5. Click *Refresh from canvas*.

The grid adapts to include the new object.

6. In the Responsive grid configuration dialog, click *Apply configuration to canvas*.

Reference: Tips for Using Responsive Design

The following are some best practices in working with Responsive Design to create responsive HTML pages:

- ❑ When creating a new responsive HTML page:
 - ❑ Use a Responsive template to generate a layout with widgets. The HTML/Document Wizard lets you control the number of rows and the number of widgets per row, lets you determine how input controls will appear, lets you add a page header, and lets you run requests automatically when the page loads at run time.
 - ❑ Use Responsive Design in the HTML canvas to generate a layout without widgets. This method lets you design a page for a BI Portal.
 - ❑ Use the Responsive Grid container to generate a layout with panels. The Responsive grid configuration dialog lets you control the number of rows and the number of panels per row. It can automatically adapt to new objects that you add to the grid.
- ❑ On the Positioning tab, the Positioning group contains the Same Width, Same Height, and Same Size commands that behave as follows in responsive design mode:
 - ❑ **Same Width.** Sets the minimum and maximum width to that of the control object (the previously selected object).
 - ❑ **Same Height.** Sets the minimum and maximum height to that of the control object (the previously selected object).
 - ❑ **Same Size.** Sets the minimum and maximum width and height to that of the control object (the previously selected object).

To use these commands:

1. Click the object whose size you want to duplicate.
 2. Use the Control key and click the secondary objects that you want to resize.
 3. Click the desired command button from the Positioning group.
- ❑ On the Positioning tab, the Responsive Design group contains the Toggle Selection and Update Layout commands. These commands are enabled in responsive design mode.

- ❑ **Toggle Selection.** Toggle on to allow responsive containers that include content to be dragged to a new position. Toggle off to prevent those containers from being repositioned.
- ❑ **Update Layout.** This command is activated in a responsive page when the Autosize children property is set to Yes. Click to refresh the HTML canvas after you reposition containers, to show how the containers will stack when folded.
- ❑ A black vertical line appears on the right side of the HTML canvas in responsive mode, as a visual indicator of the breakpoint width for desktop display. In order to control the behavior of your responsive containers, position them to the left of this line on the HTML canvas. Content appearing to the right of this line will fold arbitrarily.
- ❑ If you have both Mobile Design and Responsive Design enabled, Mobile Design takes precedence when you view content on the smartphone. Mobile Design uses jQuery mobile controls. Responsive Design uses browser-generated controls.

Designing Content for Smartphones

You can design content specifically to be used on smartphones. Content designed in this way is automatically sized, and takes full advantage of the page-swipe navigation and touch-screen capabilities of smartphones.

Note: Tablets can display native App Studio HTML content without modification. This section pertains to designing HTML content for smartphones only.

The following steps outline how you can design HTML content for smartphones:

1. Create and save your content in an HTML file that is built in the native App Studio HTML canvas.
2. Enable Mobile Layout for the HTML file by using the Enable mobile property.
For more information, see [Enabling Mobile Layout in an HTML File](#) on page 619.
3. Select either the Basic or Advanced Mobile Layout.
For more information, see [Working With the Basic and Advanced Mobile Layouts](#) on page 620.
4. Populate the smartphone pages with your HTML content.
5. View the results on your smartphone.
For more information, see [Viewing Mobile Output on a Smartphone](#) on page 626.

Designing Output for Smartphones With the Mobile Layout Functionality

Before you use the Mobile Layout functionality, you must create and save your content on the native HTML canvas. The example shown in the following image contains four objects: a text box containing a title, a drop-down control, a frame containing a report, and a frame containing a chart.



Frames

Frames in your HTML content automatically appear in the Mobile Layout. In the Basic Mobile Layout, individual frames appear separately on individual pages. In the Advanced Mobile Layout, all frames appear together on a single page. You can change either layout to display frames on pages as you like.

The page order, when viewed on a smartphone, is determined by the frame order in the Tasks area of the Tasks & Animations panel. You can change the page order in the Mobile Layout, as needed.

Animations that you have targeted to a frame included in the Mobile Layout will run on your smartphone.

Controls

To maximize the capabilities of a touch screen, single-select and multi-select controls both become listbox jQuery mobile controls, with one allowing single-select and the other multi-select.

Note: jQuery mobile controls do not display when you design your HTML page using the Mobile Layout, but will display when the page is viewed on a smartphone.

Other Objects

Some objects that you add to the HTML canvas are not automatically promoted to pages in the Mobile Layout. This is true for text boxes and images.

Objects that are not automatically promoted to pages appear below a horizontal line that underlines the page preview. You can drag objects above the line onto pages, as needed. Objects that remain below the line, and any animations targeted to them, will not appear when you view the pages on your smartphone.

Note: The size of an object that you drag into a page is accurately previewed in the page, so you can determine if the object needs to be resized. If so, you must resize it in the HTML canvas.

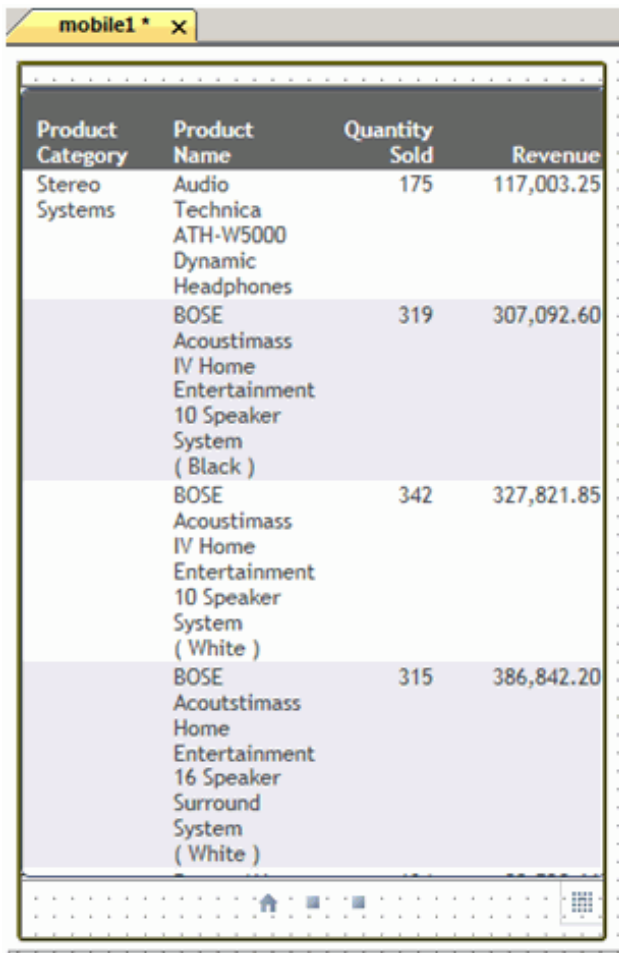
When you drag an object from below the horizontal line onto a page, the system recognizes this as a manual modification to the Mobile Layout. This triggers a message: Manual modification of mobile layout will stop default generation of the pages. It will be your responsibility to maintain it.

Accepting this means that changes to the underlying data will not flow automatically to the mobile pages. You must open the HTML file, right-click the canvas, and select *Update Layout*.

To take advantage of the default generation of the mobile pages, it is recommended that you avoid making manual modifications.

Note: You can undo manual modification of the Mobile Layout by right-clicking the canvas and clicking *Reset mobile to default*. This restores automatic update of the HTML pages, and removes any manual modifications.

A page in Mobile Layout appears as shown in the following image. In this example, the page content displays in a frame, which is scrollable when you view it on a smartphone. Below the frame is the navigation area.

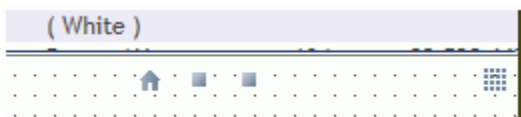


Product Category	Product Name	Quantity Sold	Revenue
Stereo Systems	Audio Technica ATH-W5000 Dynamic Headphones	175	117,003.25
	BOSE Acoustimass IV Home Entertainment 10 Speaker System (Black)	319	307,092.60
	BOSE Acoustimass IV Home Entertainment 10 Speaker System (White)	342	327,821.85
	BOSE Acoustimass Home Entertainment 16 Speaker Surround System (White)	315	386,842.20

Styling for the components of the Mobile Layout is controlled by the cascading style sheet. For more information, see [Cascading Style Sheet Class Mapping List for Mobile Components](#) on page 627.



The Navigation Area


The following image displays the navigation area that appears below the page content.



The icons in our example indicate that there is a home page, which is represented by the house icon, and two additional pages, which are represented by two square icons. In addition, there is a page combination tool, which is represented by a tile icon.

The default home page appears first in the page order. You can change the home page as needed.

You can use the square icons  and the house icon  to navigate between the pages.

You can use the tile icon  to vertically combine objects in a page, in cases where there is more than one object on a page. Toggle the tile icon to change vertical combinations.

Adding/Removing Pages

The following list describes the shortcut menu options on the Mobile Layout canvas, which you can use to add and remove pages.

- ☐ **Show all pages.** Displays all pages on the Mobile Layout canvas. Both the Basic and Advanced Mobile Layouts show one page, by default.
- ☐ **Add empty page.** Adds an empty page to the Mobile Layout canvas. You can then drag content into the page.
- ☐ **Remove empty page.** Deletes any empty pages on the Mobile Layout canvas.
- ☐ **Remove selected page.** Deletes a page that has content. The system recognizes this as a manual modification to the Mobile Layout. This triggers a message: Manual modification of mobile layout will stop default generation of the pages. It will be your responsibility to maintain it.

Accepting this means that changes to the underlying data will not flow automatically to the mobile pages. You must open the HTML file, right-click the HTML canvas, and select *Update Layout*.


- ☐ **Reset mobile to default.** Restores automatic update of the HTML pages, and removes any manual modifications.

Note: When you delete content from the HTML canvas, you must also manually delete it from the Mobile Layout. Deleting content from the Mobile Layout that was previously deleted from the HTML canvas is not interpreted as a manual modification, and will preserve the default generation of the pages.

Moving Content Between Pages

You can change the order of the pages or display more than one object on a page.

To display more than one object on a page horizontally, click the object in one screen and drag it to another.

To display more than one object on a page vertically, use the tile icon . Toggle the tile icon to remove vertical combinations.

To move a control or an object that appears below the horizontal line, drag the object to the desired page. The system recognizes this as a manual modification to the Mobile Layout. This triggers a message: Manual modification of mobile layout will stop default generation of the pages. It will be your responsibility to maintain it.

Accepting this means that changes to the underlying data will not flow automatically to the mobile pages. You must open the HTML file, right-click the HTML canvas, and select *Update Layout*.

Note: You can undo manual modification of the Mobile Layout by right-clicking the canvas and clicking *Reset mobile to default*. This restores automatic update of the HTML pages, and removes any manual modifications.

To take advantage of the default generation of the pages, it is recommended that you avoid making manual modifications.

Enabling Mobile Layout in an HTML File

An HTML file is designated for mobile output when the Enable mobile property is set to Yes. This designation enables a Mobile Layout option, where you can edit and preview your mobile output.

Note: An HTML file that has Mobile Layout enabled can additionally be viewed on a desktop or tablet. In these cases, page design is derived from the HTML canvas and the page design on the Mobile Layout is ignored. This eliminates the need to maintain different copies of the same pages for different output.

You can enable mobile output for an existing HTML file, or create a new file with mobile output enabled.

Procedure: How to Enable Mobile Output for an Existing HTML File

1. Open the HTML file.
The HTML canvas opens.
2. Open the Properties panel.
3. Change the *Enable mobile* property from *No* to *Yes*.

The HTML canvas shortcut menu now includes mobile output options.

Procedure: How to Create a New File With Mobile Output Enabled

1. On the Home tab, in the Content group, click *HTML/Document*. You can also create a new HTML file from the Application menu or by using the shortcut menu in the Environments tree panel, for a folder that supports content creation.

The HTML/Document Wizard opens.

2. Navigate to where you want to create your HTML page and click *Next*.

The Themes and Settings window of the HTML/Document Wizard opens.

3. In the Mobile Design area, click *Enable*.

Selecting this option automatically sets the *Enable mobile* property to Yes in the Properties panel.

4. Click *Finish*.

The HTML canvas opens. The canvas shortcut menu now includes mobile output options.

Working With the Basic and Advanced Mobile Layouts

There are two different layouts for designing HTML output for smartphones, Basic and Advanced.

- ☐ **Basic Mobile Layout.** Enables you to build simple smartphone pages that you can navigate using graphical icons and page-swipe. The Basic Mobile Layout displays individual frames from your HTML canvas on individual mobile pages, by default. You can change this as needed.
- ☐ **Advanced Mobile Layout.** Offers the same features as the Basic, but also gives you the additional ability to add a table of contents with or without a logo, and add a logo on each page.

In the Advanced Mobile Layout, all frames from your HTML canvas appear together on a single mobile page, by default. You can change this as needed.

Having selected one layout, you may choose to switch to the other, if needed. For more information, see [How to Change Between Basic and Advanced Mobile Layouts](#) on page 622.

Procedure: How to Use the Basic Mobile Layout

You can work with the Basic Mobile Layout when you have saved content in the HTML canvas and when you have set the Enable mobile property to Yes.

1. Right-click the HTML canvas and click *Show Mobile Layout (basic)*.

The Basic Mobile Layout is displayed.

Styling for the components of the Mobile Layout is controlled by the cascading style sheet. For more information, see [Cascading Style Sheet Class Mapping List for Mobile Components](#) on page 627.

2. Edit the mobile content in the following ways:

- ❑ To preview all pages, right-click the Mobile Layout canvas and click *Show all pages*. This displays all pages side-by-side.
- ❑ A horizontal line appears below the navigation area. Any objects that appear below the line come from the HTML canvas, but were not automatically added to the Mobile Layout.

To add objects to the Mobile Layout, drag them from the area below the line to the desired place in the layout.

The system recognizes this as a manual modification to the Mobile Layout. This triggers a message: Manual modification of mobile layout will stop default generation of the pages. It will be your responsibility to maintain it.

Accepting this means that changes to the underlying data will not flow automatically to the mobile pages. You must open the HTML file, right-click the HTML canvas, and select *Update Layout*.

Note: You can undo manual modification of the Mobile Layout by right-clicking the canvas and clicking *Reset mobile to default*. This restores automatic update of the HTML pages, and removes any manual modifications.

To take advantage of the default generation of the pages, it is recommended that you avoid making manual modifications.

- ❑ To combine pages horizontally, drag one page to another.
- ❑ To change the home page, select the desired page, right-click the Mobile Layout canvas, and click *Set current page as home page*.

Additionally, you can drag a page to the home page screen. If necessary, drag the old page to a different screen.

Note: When you change the page order by manually dragging in the Mobile Layout, it overrides the page order specified in the Tasks & Animations panel.

- ❑ If there are any empty pages in your preview, right-click the canvas and click *Remove empty pages*.

3. Save the HTML file.

You can now view the HTML file on a smartphone. The layout is derived from the Mobile Layout. For more information, see [Viewing Mobile Output on a Smartphone](#) on page 626.

Additionally, you can view the HTML file on a desktop or tablet. The layout is derived from the HTML canvas.

Procedure: How to Change Between Basic and Advanced Mobile Layouts

To change between Basic and Advanced Mobile Layouts:

1. Right-click the existing Mobile Layout canvas and click *Reset mobile to default*.
This restores the Mobile Layout to its original state.
2. Right-click the existing Mobile Layout canvas and click *Back to desktop*.
The HTML canvas opens.
3. Right-click the HTML canvas and click the new layout, *Show Mobile Layout (basic)* or *Show Mobile Layout (advanced)*.

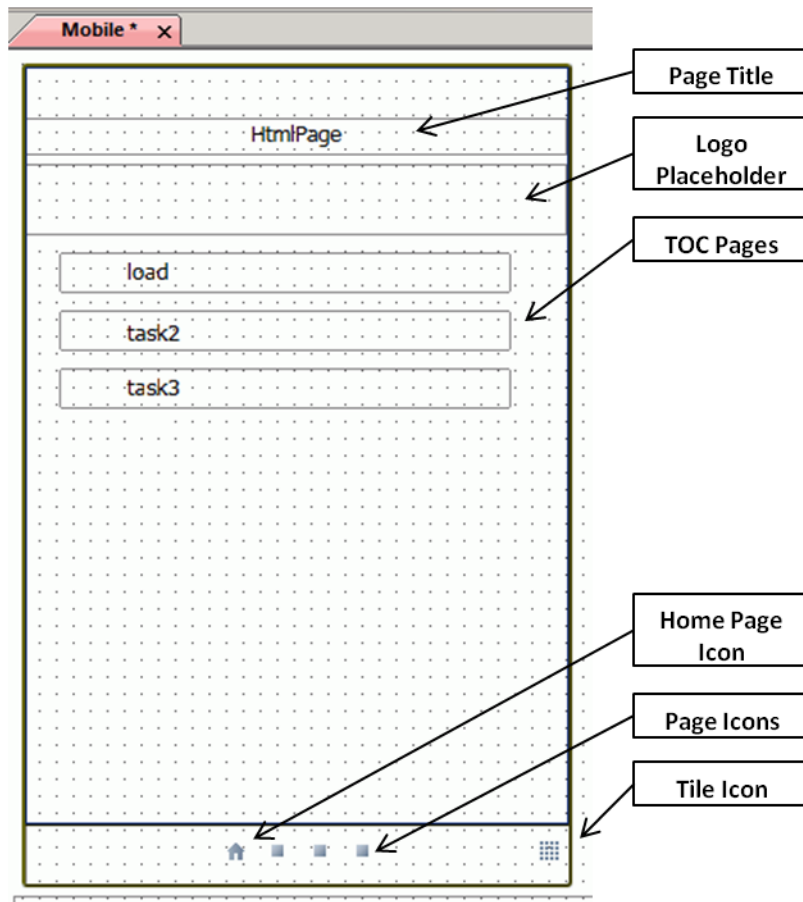
Procedure: How to Create a Table of Contents for Mobile Output

With the Advanced Mobile Layout, you can include a table of contents page to help users navigate quickly. This may be useful when your mobile output contains a large number of pages.

To design output for smartphones that includes a table of contents:

1. Create an HTML page.
2. Right-click the HTML canvas and click *Show mobile layout (advanced)*.

The Mobile Layout opens and displays the table of contents preview, as shown in the following image.



The Mobile Layout default display shows a single page, which previews the appearance of the table of contents in a smartphone format.

In our example, this rectangle contains the title *HtmlPage*.

Styling for the components of the Mobile Layout is controlled by the cascading style sheet. For more information, see [Cascading Style Sheet Class Mapping List for Mobile Components](#) on page 627.

3. Edit your layout in the following ways:

- ❑ To change the title, use the drop-down at the top of the Properties panel and select *table_of_contents*. In the *Title* field, type the new title.

The new title now appears in the table of contents preview.

- ❑ You can choose to show or to hide the table of contents on a smartphone. The default is to show it.

To hide the table of contents on a smartphone, select *No* from the *Show at run time* property field.

In the preview, the rectangles for each page represent hyperlinks in the table of contents, which open the selected page. In our example, there are hyperlinks for the *task2* and *load* page titles.

- ❑ To change page titles, select the *Title* property field for a specified page and type the desired title.

The new titles appear at the top of the page and on the table of contents.

4. Save the HTML file.

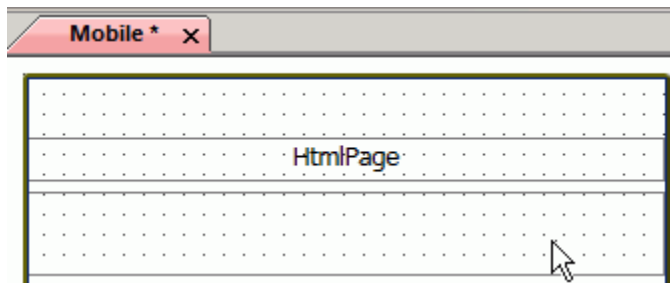
You can now view the HTML file with a table of contents on a smartphone. For more information, see [Viewing Mobile Output on a Smartphone](#) on page 626.

Procedure: How to Add a Logo to a Mobile Table of Contents

You can add a logo to the table of contents page of your mobile layout.

1. Open the Advanced Mobile Layout of an HTML file that has a table of contents.

The logo placeholder is indicated by the cursor in the following image.



2. In the drop-down at the top of the Properties panel, click *table_of_contents*.

The table of contents properties display.

3. In the *Logo* field, click the ellipsis button.

The Open File dialog box appears.

4. Select the desired logo file and click *OK*.

The logo now appears in the table of contents preview.

Note: The logo placeholder box provides an accurate preview of the way the logo will appear on a smartphone. It will indicate if the graphic file you selected needs to be resized.

5. Save the HTML file.

You can now view the HTML file with a table of contents on a smartphone. For more information, see [Viewing Mobile Output on a Smartphone](#) on page 626.

Procedure: How to Add a Logo to Each Page of the Contents

You can add a logo to each page of the table of the contents in your mobile layout.

1. Open the Advanced Mobile Layout of an HTML file that has a table of contents.
2. Open a page, other than the table of contents page.

The small square near the top left of the page, indicated by the cursor in the following image, is a placeholder for a logo.



3. In the drop-down at the top of the Properties panel, click *table_of_contents*.
The table of contents properties fields display.

4. In the *All swipes logo* field, click the ellipses button.
The Open File dialog box appears.

5. Select the desired logo file and click *OK*.

The logo now appears on each page of the preview.

Note: The logo placeholder for the individual pages is a small box. It provides an accurate preview of the way the logo will appear on a smartphone, and indicates whether the graphic file that you selected needs to be resized.

6. Save the HTML file.

You can now view the HTML file with a table of contents on a smartphone. For more information, see [Viewing Mobile Output on a Smartphone](#) on page 626.

Viewing Mobile Output on a Smartphone

There are multiple ways that mobile output from App Studio can be viewed on a smartphone, depending upon the configuration of your environment. These include:

- ☐ Data Servers
- ☐ Mobile Favorites
- ☐ The Mobile Faves App

These ways are outlined in the following section.

Note: Check with your system administrator for your best practice in viewing mobile output.

Data Servers - APPROOT

During installation, App Studio and WebFOCUS set certain variables that affect the implementation. Your system administrator has the option of changing the values for these variables to meet site-specific needs. Most sites use the default values supplied during installation.

You can optionally specify the path in which files will reside on the web server and the WebFOCUS Reporting Server. The path is defined by the APPROOT variable, which you can set in two different files, one for the web server and one for the Reporting Server.

In App Studio, the Applications/baseapp folder typically resides on the APPROOT server. To view mobile output through Data Services:

1. Copy the mobile-enabled HTML file to the baseapp folder.
2. Open the baseapp copy of the file and run it.

A browser window opens showing the HTML content.

3. Copy the resulting URL from the browser, and email it to an account that is available on your smartphone.
4. Click the URL in your email.

The output opens in a browser, as designed in the Mobile Layout that you selected.

Note: Check with your system administrator if you need assistance viewing mobile output on your smartphone through Data Servers - APPROOT.

Mobile Favorites

Mobile Favorites are HTML files, reports, graphs, hyperlinks, and other item types residing in the Content area, that you can add to the Mobile Favorites list in the BI Portal. Adding items to the Mobile Favorites list enables you to display them on mobile devices. For more information, refer to the *Business Intelligence Portal* manual.

Note: Content residing on your local folder is not accessible through Mobile Favorites. It must reside in the Content area of App Studio.

Mobile Faves App

The Mobile Faves app is automatically set up to obtain content from a server on the Internet, where you can view sample business content. You can add your own WebFOCUS servers to the list, including those that contain the HTML files that are enabled for mobile output. You will see a list of available folders saved to the selected server connection. These folders contain all of the content previously selected as Mobile Favorites from your WebFOCUS portal.

iPhone or Android users can download the free Mobile Faves app from the App Store or the Google Play Store. For more information, refer to the *Mobile Faves for Android User's Manual* or the *Mobile Faves for iOS User's Manual*.

Cascading Style Sheet Class Mapping List for Mobile Components

This section contains a list of IBI classes that are used to style various components and controls for Mobile design.

Components/Controls	Classes Used
Smartphone container border color	<code>.IBI_SmartPhoneContainer { border-color:#4C5E76; }</code>
Control panel border color	<code>.IBI_MobileControlPanel { border-top-color: #4C5E76; }</code>
Control panel font	<code>.IBI_MobileControlPanel { font-size:small; color: green; }</code>
Page content font	<code>.IBI_MobilepageContent { font-size: large; color: Red; }</code>

Components/Controls	Classes Used
TOC content font	<code>.IBI_MobileTocContent { font-size: large; color: Blue; }</code>
Label font	<code>.IBI_MobileLabel { font-size: large; color: Azure; }</code>
HTML title	<code>.IBI_MobileTocTitle { font-size: x-large; color: BlueViolet; }</code>
Task name in TOC	<code>.IBI_MobileTocItem { font-size: x-large; color: ForestGreen; }</code>
Control panel text	<code>.IBI_MobileSwipeHeaderText { font-size: small; color: Crimson; }</code>

Cascading Style Sheet Support Matrix for Internet Explorer

The following table is a list of all Cascading Style Sheet (CSS) properties and whether they are supported in Internet Explorer 9 and Internet Explorer 10.

CSS Property	Internet Explorer 9	Internet Explorer 10
Borders		
border-radius	Supported	Supported
box-shadow	Supported	Supported
border-image	Not Supported	Not Supported
Background		

CSS Property	Internet Explorer 9	Internet Explorer 10
background-size	Supported	Supported
background-origin	Supported	Supported
Animations		
keyframes	Not Supported	Supported
animation	Not Supported	Supported
animation-name	Not Supported	Supported
animation-duration	Not Supported	Supported
animation-timing-function	Not Supported	Supported
animation-delay	Not Supported	Supported
animation-iteration-count	Not Supported	Supported
animation-direction	Not Supported	Supported
animation-play-state	Not Supported	Supported
Text		
text-shadow	Not Supported	Supported
word-wrap	Supported	Supported
text-overflow	Supported	Supported
word-break	Supported	Supported
text-justify	Not Supported	Supported
2D and 3D Transforms		
transform	ms-transform - only 2D	Supported - 2D and 3D
transform-origin	ms-transform - only 2D	Supported - 2D and 3D

CSS Property	Internet Explorer 9	Internet Explorer 10
transform-style	Not Supported	Supported
perspective	Not Supported	Supported
perspective-origin	Not Supported	Supported
backface-visibility	Not Supported	Supported
Fonts		
font-feature-settings	Not Supported	Supported
hyphens	Not Supported	ms-hyphens
hyphenate-limit-zone	Not Supported	ms-hyphenate-limit-zone
hyphenate-limit-chars	Not Supported	ms-hyphenate-limit-chars
hyphenate-limit-lines	Not Supported	ms-hyphenate-limit-lines
Multi Column Layout		
columns	Not Supported	Supported
column-count	Not Supported	Supported
column-gap	Not Supported	Supported
column-rule	Not Supported	Supported
column-rule-color	Not Supported	Supported
column-rule-style	Not Supported	Supported
column-rule-width	Not Supported	Supported
column-span	Not Supported	Supported
column-width	Not Supported	Supported
column-fill	Not Supported	Supported

CSS Property	Internet Explorer 9	Internet Explorer 10
break-after	Not Supported	Supported
break-before	Not Supported	Supported
break-inside	Not Supported	Supported
Transitions		
transition	Not Supported	Supported
transition-property	Not Supported	Supported
transition-duration	Not Supported	Supported
transition-timing-function	Not Supported	Supported
transition-delay	Not Supported	Supported
User Interface		
resize	Not Supported	Not Supported
border-box	Not Supported	Not Supported
outline-offset	Not Supported	Not Supported
appearance	Not Supported	Not Supported
Gradients		
linear-gradient	Not Supported	Supported - ms-linear-gradient
radial-gradient	Not Supported	Supported - ms-radial-gradient
repeating-linear-gradient	Not Supported	Supported - ms-repeating-linear-gradient
repeating-radial-gradient	Not Supported	Supported - ms-repeating-radial-gradient

Cascading Style Sheet Class Mapping List

This section contains a list of IBI classes that are used to style various components and controls.

Components/Controls	Classes Used
Body	IBI_PageBg
Report	IBI_Report-iFrame; IBI_rounded_m
Chart	IBI_Report-iFrame; IBI_rounded_m
Hyperlink	IBI_LinkItem
Button	IBI_button
Reset	IBI_button
Label	IBI_ReportControlLabel
Form	IBI_ReportControlPanel; IBI_rounded_m
Submit Button	IBI_button; IBI_btn-run
Reset Button	IBI_button; IBI_btn-reset
Save Selection Button	IBI_btn-saveselection
Defer Button	IBI_btn-defer
Schedule Button	IBI_btn-schedule
Panel	IBI_Panel; IBI_rounded_m
Map	IBI_ReportControlTarget
Frame	IBI_rounded_m
Edit box	IBI_ReportControlTarget; IBI_rounded_s
Drop down	IBI_ReportControlTarget; IBI_rounded_s
List Box	IBI_ReportControlTarget; IBI_rounded_s

Components/Controls	Classes Used
Double List	IBI_ReportControlTarget, IBI_btn-up, IBI_btn-down, IBI_btn-left, IBI_btn-right
Radio Button	IBI_ReportControlTarget; IBI_Radio
Check Box	IBI_ReportControlTarget; IBI_CheckBox
Text Area	IBI_rounded_m
Single Source Tree	IBI_ReportControlTarget
Multi Source Tree	IBI_ReportControlTarget
Horizontal Slider	IBI_ReportControlTarget; IBI_rounded_s; IBI_SliderInput; IBI_buttonSliderNav; IBI_btn-left; IBI_btn-right; IBI_SliderTrack; IBI_SliderHandle
Vertical Slider	IBI_ReportControlTarget; IBI_rounded_s; IBI_SliderInput; IBI_buttonSliderNav; IBI_buttonSliderNavVert; IBI_btn-up; IBI_btn-down; IBI_SliderTrack; IBI_SliderTrackVert; IBI_SliderHandle; IBI_SliderHandleVert
Info Window	IBI_InfoWnd; IBI_InfoWndTitleBar; IBI_InfoWndFrame
Tab	IBI_MultiContentPlugin
Tab Header	IBI_pageHeader
TabHeader - Top Tab	IBI_pageHeaderTab_TopBottom
TabHeader - Bottom Tab	IBI_pageHeaderTab_Bottom
TabHeader - Left Tab	IBI_pageHeaderTab_Left
TabHeader - Right Tab	IBI_pageHeaderTab_Right
Tab Selected	IBI_pageHeader_Selected
Vertical Tab/Accordion/Window header	IBI_pageHeader_Vertical

Components/Controls	Classes Used
Vertical Tab/Accordion/Window Selected	IBI_pageHeaderVertical_Selected
Tab Heading Text	IBI_pageHeaderText
Tab Heading Text - Left Tab	IBI_textVerticalTopToBottom
Tab Heading Text - Right Tab	IBI_textVerticalBottomToTop
Tab/Window/Accordion Content	IBI_pageContent
Tab/Window/Accordion Content - Top	IBI_pageContentTab_Top
Tab/Window/Accordion Content - Bottom	IBI_pageContentTab_Bottom
Tab/Window/Accordion Content - Left	IBI_pageContentTab_Left
Tab/Window/Accordion Content - Right	IBI_pageContentTab_Right
Tab/Accordion/Window Min/Max box	IBI_windowNavBox
Tab/Accordion/Window images	IBI_windowMaxRestore; IBI_windowMaximize; IBI_windowMinimize; IBI_windowTiles; IBI_windowFlipRight; IBI_windowFlipLeft
Mobile components	
Smartphone container border color	IBI_SmartPhoneContainer
Control panel	IBI_MobileControlPanel
Page content	IBI_MobilepageContent
TOC content	IBI_MobileTocContent
Label	IBI_MobileLabel
TOC title	IBI_MobileTocTitle
TOC task name	IBI_MobileTocItem

Components/Controls	Classes Used
Control panel text	IBI_MobileSwipeHeaderText

Creating Documents in WebFOCUS App Studio

In App Studio, you can create and edit documents using the Document canvas. When you create a new document, you use the HTML/Document Wizard.

This topic describes how to launch the HTML/Document Wizard to create documents. It also identifies and explains the tabs and panels that are available when you are developing documents in the Document canvas.

In this chapter:

- ❑ [Launching the HTML/Document Wizard](#)
- ❑ [Accessing Document and Active Dashboard Components With the App Studio Ribbon](#)
- ❑ [Previewing the Document Canvas Using the Thumbnails Panel](#)
- ❑ [Editing the Properties of the Document Canvas Using the Properties Panel](#)

Launching the HTML/Document Wizard

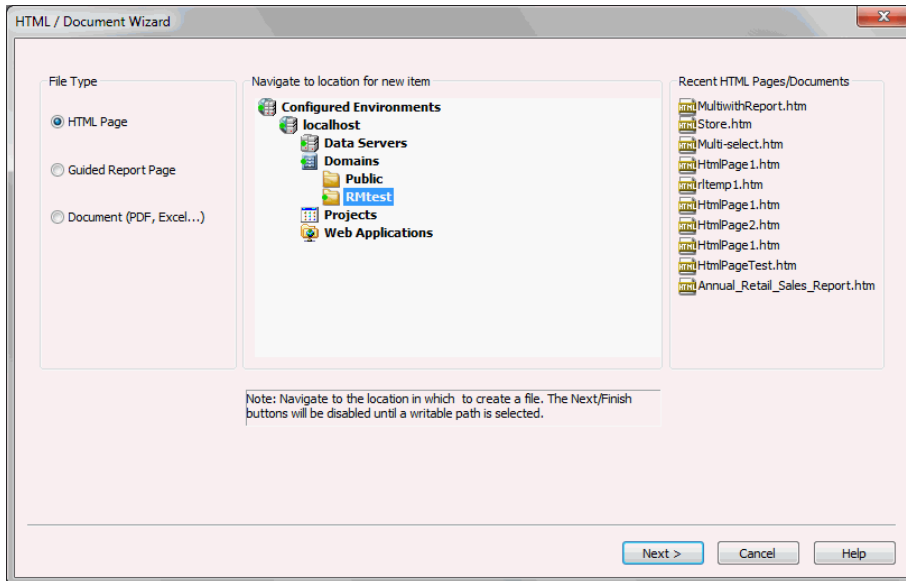
The HTML/Document Wizard allows you to create a new HTML Page, Guided Report Page, or Document, and open a recent procedure. This section details how to create an HTML page using the HTML/Document Wizard.

To open the HTML/Document Wizard:

- ❑ On the Home tab, in the Content group, click *HTML/Document*.
- ❑ In the Environments Tree panel, right-click an application folder, point to *New*, and click *HTML/Document*.

Note: If you choose to create a new HTML page or Document using the shortcut menu in the Environments Tree panel, your wizard will not include a Navigator panel since the location of your HTML page or Document is already selected.

The HTML/Document Wizard opens, as shown in the following image.



From the HTML/Document Wizard, you can open a recent procedure or create a new one.

Procedure: How to Create a Document Using the HTML/Document Wizard

Use the HTML/Document Wizard to create a FOCUS executable (.fex) document, as detailed below. After you have launched the HTML/Document Wizard:

1. In the File Type area, select *Document*.
2. Navigate to where you want to create the new procedure or select a recent procedure.

Note: If you used the shortcut menu in the Environments Tree panel to create your document, a location is already selected.

3. Optionally, click *Next* to set the Document Properties. For more information, see [How to Select Document Output Format Using the HTML/Document Wizard](#) on page 639.
4. Click *Finish*.

Note: The Finish button is unavailable until you select a valid path.

The Document canvas and Properties panel open. You can now add data to your document and format the data using the tabs in the ribbon.

5. Click the page layout to add objects to the page.
6. To save your document, click the Save button on the Quick Access Toolbar, or select Save from the Application menu.

The document is saved with a .fex extension.

7. To run your Active Document, click *Run* on the Quick Access Toolbar, or click *Run* from the Application menu.

Procedure: How to Select Document Output Format Using the HTML/Document Wizard

Use the HTML/Document Wizard to create a document that you can output in various formats.

After you choose an output format, the program associated with that format opens when you click the *Run* button on the Quick Access Toolbar. For example, if you select one of the PowerPoint options (PPTX or PPT), PowerPoint opens to preview your document when you click *Run*.

In the HTML/Document Wizard:

1. In the File Type area, select *Document*.
2. Navigate to where you want to create the new procedure or select a recent procedure.

Note: If you used the shortcut menu in the Environments Tree panel to create your document, a location is already selected.

3. Click *Next*.

The Document Properties dialog box opens.

4. Use the Output Format list to choose one of the following output formats:

- ☐ PDF
- ☐ DHTML
- ☐ PowerPoint (PPTX or PPT)
- ☐ active report
- ☐ Excel (XLXS or XLS)
- ☐ Excel Formula (XLXS or XLS)
- ☐ active Flash
- ☐ active PDF
- ☐ User (to display a run time prompt for selecting the output format)

5. In the Coordinate Report list, select *On* if you want all reports and graphs that contain a common sort field to be burst into separate page layouts. Each value for the first sort field displays on a separate page.

Additionally, in this area, you can specify page size, page orientation, and units of measure.

To add additional pages, select *Add Table of Contents* and/or *Add Master Page*.

6. Click *Finish*.

The Document canvas opens.

7. Build your document in the Document canvas.
8. To view it in the selected output format, click *Run* on the Quick Access Toolbar, or click *Run* from the Application menu.

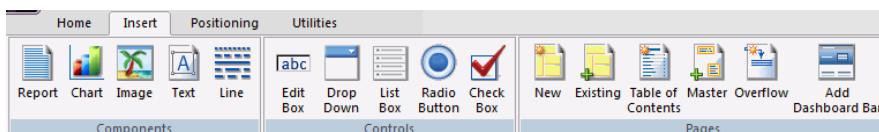
Procedure: How to Create an Active Technologies Dashboard Using the HTML/Document Wizard

Accessing Document and Active Dashboard Components With the App Studio Ribbon

The following topics describe the tabs and panels that are available when you are create a document or active dashboard in the Document canvas.

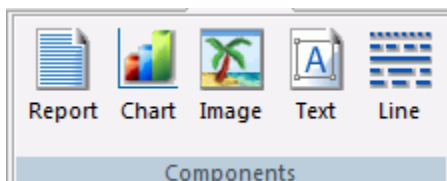
Inserting Components and Controls in a Document or Active Dashboard Using the Insert Tab

You can insert components and controls in a document or active dashboard. The Insert tab contains the Components, Controls, and Pages groups, as shown in the following image.



Inserting Components in a Document or Active Dashboard Using the Components Group

You can insert a report, chart, image, text, or line component in a document or active dashboard. The Components group is shown in the following image.



The components are:

Report

Inserts a report object. You can add reports to the Document canvas that appear when you run the layout. You can either embed or reference reports. Double-clicking a blank report object opens the Report canvas, where you can create and style a report to be used on the Document canvas.

You can also include parameters in a report. The values of the parameters can be assigned with controls that are added on the Document canvas.

Chart

Inserts a chart object. You can add charts to the Document canvas that appear when you run the layout. You can either embed or reference charts. Double-clicking a blank chart object opens the Chart canvas, where you can create and style a chart to be used on the Document canvas.

Image

Inserts an image. You can add an image, such as a company logo, to the layout.

You can insert an image into your document and add a hyperlink to it. After you run your document, and click the image, you can launch a URL, or run a report.

Note: An inserted image must be referenced from a specific directory location.

Text

Inserts a text box. You can add text, such as headings, to your webpage. You can add directions or explanations for your reports and charts.

Line

Inserts a line. You can add a horizontal or vertical line to distinguish between sections of your launch or display page.

Procedure: How to Format Text in a Document

You may apply various formatting and style options to words and individual text characters within the text object.

Note: Any formatting and styling that you may have applied to individual text strings within the text object will remain unchanged.

1. On the Insert tab, in the Components group, click *Text*.
The pointer changes to a crosshair.
2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
3. Highlight the text that you wish to format.
4. Right-click the text, point to *Style*, and then click *Font*.
The Font dialog box opens.

Note: You can also access font formatting options in the Properties panel.

5. Select from the formatting options available. You can change the type, style, color, size, and effect of the font.
 6. Click *OK* to close the Font dialog box.
- The formatting options that you selected applied to the text.

Procedure: How to Insert a Bulleted List or Numbered List Into a Text Element

To insert a bulleted list or numbered list into a text object:

1. On the Insert tab, in the Components group, click *Text*.
The pointer changes to a crosshair.
2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
3. Add multiple lines of text to the text object.
4. Highlight and right-click the text that you want to include in the list.
5. In the shortcut menu, select one of the following list options:

- ☐ **Bullets**

- ☐ Disc
- ☐ Circle
- ☐ Square
- ☐ **Numbering**
 - ☐ Numbers
 - ☐ Lowercase Letters
 - ☐ Uppercase Letters
 - ☐ Small Roman numerals
 - ☐ Large Roman numerals

Note:

- ☐ Alternatively, you can select a bullet type before typing text to begin the list. Pressing enter will begin the next item in the list on a separate line.
- ☐ To change the bullet or number list type of an existing list, place your pointer on the list level you want to change and reselect a bullet or number list type. Selecting *None* will remove the bullets or numbers for that level and move any nested lists up one level. In order to switch between bullets and numbers, you must first remove the current list option by selecting *None* and then applying the list option you want.

Procedure: How to Insert Nested Lists Into a Text Element

To insert a nested list into the text object:

1. On the Insert tab, in the Components group, click *Text*.
The pointer changes to a crosshair.
2. Drag your pointer across the canvas to create a text object.
A text object with the default text, *Enter text*, is created.
3. Add a list to the text object. For more information, see [How to Insert a Bulleted List or Numbered List Into a Text Element](#) on page 642.
4. Place your pointer after a list item.
5. Right-click, point to *Nested List* and then select a bulleted or numbered list option.

A list is started within the current list, allowing you to enter text on that list level.

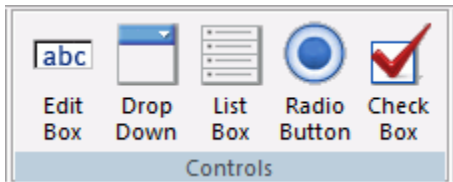
Note: Pressing tab while your pointer is on the same line as a list item will move that item one level down, resulting in a nested list. The bullet or number type selected is the next list type in the right-click shortcut menu. For example, if you have a bulleted list that uses the disc bullet type, pressing tab to move an item down one level will cause that nested list to have the circle bullet type.

You can continue to nest lists within other lists by using the same steps shown above.

Note: You cannot skip a list level. For example, in order to insert a nested bulleted list or nested numbered list on a lower level, there must be a list one level up from it.

Inserting Controls in an Active Dashboard Using the Controls Group

You can insert an edit box, drop-down list, list box, radio button, or check box control in an active dashboard. The Controls group is shown in the following image.



The controls are:

Edit Box

Inserts a text box. You can enter a value in the text box.

Drop Down

Inserts a drop-down list. A drop-down list enables you to select single or multiple values from a list of supplied values. In order to provide multiple values, the procedure must be set up to accept multiple values.

- ☐ From a single-select list, you can select only one value each time a request is run.
- ☐ From a multi-select list, you can select multiple values at once using the check boxes adjacent to the values.

You can use a dynamic or static list of values for the drop-down list.

List Box

Inserts a list. You can select single or multiple values at one time from a list box:

- ☐ From a single-select list, you can select only one value for each time a request is run.
- ☐ From a multi-select list, you can select multiple values all at once by holding down the Ctrl key as you select values.

In order to provide multiple values, the procedure must be set up to accept multiple values.

List box values can be dynamic or static.

Radio Button

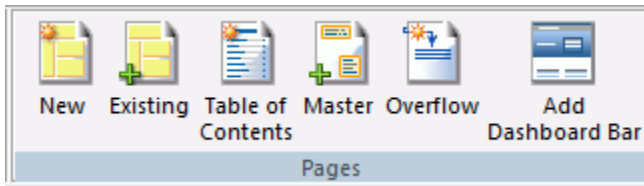
Inserts a radio button. Using a radio button, you can only select a single value from a list of supplied values. Radio button values can be static or dynamic.

Check Box

Inserts a check box into an active report, active Flash file, or active PDF file. You can select multiple values from multiple check boxes.

Adding Pages to a Document or Active Dashboard Using the Pages Group

You can add a new or existing page, or a Table of Contents, Page Master, or size and overflow page in a document or active dashboard. The Pages group is shown in the following image.



The commands are:

New

Inserts a new page to the Page Layout canvas. The new page appears below the current page and is named Page layout *n*, where *n* is a number that increments by 1.

Note:

- ❑ You can also right-click the Page Layout canvas and select *Insert new page after* or *Insert new page before* to indicate where to include the new page.
- ❑ To delete a page, select the page in the Page Layout canvas and press the *Delete* key on the keyboard.

Existing

Inserts an existing page. This page can contain images, drawing objects, text, page settings, reports, and charts.

To insert an existing page into your document, it must be saved as a procedure and exist somewhere in the WebFOCUS environment.

Note:

- ❑ You can also right-click the Page Layout canvas and select *Insert existing page after* or *Insert existing page before* to indicate where to include the existing page.
- ❑ To delete a page, select the page in the Page Layout canvas and press the *Delete* key on the keyboard.

Table of Contents

You can generate a Table of Contents page that shows a summary of the contents of the document, along with page numbers, and that can be printed with the document.

The entries can link to any component of the compound output (page, report, or graph) and vertical sort field values (BY field values) within each component report. The entries in the Table of Contents enable you to easily navigate to a particular section while viewing the document online.

When creating a compound layout report or a coordinated compound report, you can enable bookmarks available in Adobe® Acrobat® for PDF formatted reports. Bookmarking uses the Table of Contents descriptions, and the Table of Contents page and levels, to show specific reference points in the compound document.

Note: You cannot add a report, chart, image, text, or line object to the Table of Contents page. These commands are disabled when the Table of Contents is selected.

Master

Inserts a Page Master. A Page Master is a page that can be added in the Design View where you can add and edit repeating elements, such as the company logo, or page numbers. Any element placed on the Page Master repeats on every page in the resulting report.

Note: You cannot add a report or chart to the Page Master. These options are disabled when the Page Master is selected.

Overflow

Sets the size and overflow of a report object at run time.

You can control the overflow and relative (vertical) positioning of reports and graphs in coordinated compound documents so that reports fill the entire page, as well as maintain their relative position in the document.

Overflow is defined as the area of a report that exceeds its defined space in the page layout. For example, a multi-page report and a graph can both be added to a single page layout with the graph positioned beneath the report.

The report can flow or fill the page and the graph can be relatively positioned to the report, so it is placed at the end of the document following the complete rendering of the report.

Overflow and positioning options are available from the Properties window and from the Positioning toolbar.

Add Dashboard Bar

Inserts a Dashboard Bar into an active dashboard. A Dashboard Bar is an additional page layout where you can insert controls, reports, and charts that display above the dashboard tabs.

The Dashboard Bar is only available for the active report formatted documents. A Dashboard Bar can be a maximum of one page.

You can insert a Dashboard Bar into active Flash and active PDF formatted documents. However, if you run these documents, an empty page is returned.

Procedure: How to Create a Table of Contents Page

1. Create a new document, or open an existing document.
2. From the Insert tab, in the Pages group, click *Table of Contents*.

The Table of Contents page appears in the document.

Table of Contents is the default title for the page. To edit the title, select the current title and type your new title.

To style the title, select the text, right-click it, and in the shortcut menu that opens, point to *Style*, and select from among the following options: *Bold*, *Italic*, *Underline*, or *Superscript*.

In addition, you can select *Font* to open the Font dialog box, where you can set the font, font style, font size, font color, and font effects.

Note: The text does not wrap and must fit within the width of the overall text element.

3. Click *Run* to load your document.

The Table of Contents appears as the first page in your output.

4. Click a hypertext link on the Table of Contents page to jump to that section within the document.

Procedure: How to Control Which Objects Appear in the Table of Contents

Note: The objects that appear in the Table of Contents depend on whether the document is coordinated or uncoordinated. By default, all report, chart, and page layout objects appear in the Table of Contents for uncoordinated documents.

To control which objects appear in the Table of Contents:

1. Select a report, chart, or page layout object.

Each object has a TOC description, TOC level option, and TOC Number of sort levels in the Properties panel.

2. To change the name of the description for the object, type over the *TOC description* in the Properties panel.

This description appears in the Table of Contents at run time.

3. To change the hierarchical order of how the object appears in the Table of Contents, type a TOC level.

For example:

0 = the object is not shown in the Table of Contents.

1 = the object is shown as a first level item in the Table of Contents.

2 = the object is shown as a second level item in the Table of Contents.

Follow this sequence for additional levels.

These levels appear in the Table of Contents at run time.

4. To change the number of vertical sort fields (TOC levels) that appear in the Table of Contents for the component, use the up or down arrow to adjust *TOC Number of sort levels* in the Properties panel. If the value designated is greater than the count of BY fields in the component report, then the value defaults to the total count of available BY fields.

Note: Coordinated reports do not support TOC Number of sort levels within a compound TOC. Those entries are ignored for coordinated reports.

5. Run the procedure to see the updated TOC description and TOC levels.

Procedure: How to Use Bookmarks

1. Create a compound layout that is made up of multiple reports and/or charts.
2. Use the Properties panel to select each report/chart, and enter a bookmark (Table of Contents) description, or use the default selections.

Note: The Table of Contents page might or might not be included in the compound document, however, the descriptions and levels that appear as bookmarks are set through these options.

3. In the Properties panel, from the Properties list, select *Compound document*.
4. From the Bookmarking drop-down list, select *On*.

Note: Bookmarking is off by default.

5. Click *Run* to load your document.
The bookmark tab is expanded in the PDF output.
6. Click a bookmark link to jump to that section within the document.

Note: You can use the shortcut menu to change the bookmark properties.

Procedure: How to Create a Page Master

1. Create a new document, or open an existing document.
The document opens on the Document canvas.

2. From the Insert tab, in the Pages group, click *Master*.

The Page Master is added to the document.

3. Add components (text, images, lines) and set their properties on the Page Master.

Note: Only text, images, and lines can be added to the Page Master.

4. Click *Save* to save your new Page Master or to save your changes to an existing Page Master.

Procedure: How to Use an Existing Page Master in Another Document

1. Create a new document, or open an existing document.
2. From the Insert menu, in the Pages group, click *Existing*.

The Open dialog box opens.

3. Select the procedure file (.fex) that contains the Page Master.
4. Click *OK*.

If a Page Master has already been added to the document, a message appears stating that a Page Master already exists in the current layout. You can respond in one of the following ways:

- ☐ Click *Yes* to replace the existing Page Master with the new one.
 - ☐ Click *No* to merge the two Page Masters.
 - ☐ Click *Cancel* to use the existing Page Master, instead of the Page Master from the Page Layout template.
5. Save the document.

Procedure: How to Customize the Overflow for a Fixed Report

1. Select an object from the Design View.

The Properties panel shows the available properties for the selected object.

2. Select *Fixed* from the Size and Overflow drop-down list.

Note: Fixed is the default selection. If Not Set is selected, Fixed is used as the default.

3. Right-click the fixed report in the Design View and select *Customize Fixed Overflow*.

The overflow page is added after the page layout in the Design View, displaying a copy of the fixed component (with the original size and position) from the page layout. Scroll down in the Design View until you see the overflow page.

4. Resize the report to fill the page. You can also reposition the report overflow.
5. Run the report.

Note: If the document contains multiple fixed reports, the report output maintains the same size and position as the report objects on the Document canvas.

Procedure: How to Set the Flowing Report Property

1. Select an object from the Design View.

The Properties panel shows the available properties for the selected object.

2. Click *Flowing* from the Size and Overflow drop-down list.

Note: Repeat this step for any surrounding report objects to prevent the overlapping of reports and charts at run time.

Tip: When set to Flowing, flow margins are available for the page layout. These margins further enable you to adjust the page so that the report fills each page between the flow margins.

3. Run the document.

Note:

- ❑ If the document contains multiple flowing reports, the reports might overlap at run time. If you want one report to run until completion before the next report begins, you must set the relationship between the reports.
- ❑ If the document contains a flowing report and a chart, the chart might overlap the report at run time. If you want the report to run until completion before the chart begins, you must set the relationship between the chart and the report.

Procedure: How to Set Flow Margins for the Page Layout

When using Flowing overflow, each page layout has flow margins. Flow margins are set through the top and bottom margins. Flowing reports utilize flow margins to ensure that all reports fill the page, or the selected portion of the page, and that the header and footer information is preserved in the output.

Note: Flow margins are not available for Fixed overflow.

To set flow margins for the page layout:

1. On the Document canvas, select a page layout from the Design View.

Note: Ensure that the report object is set to Flowing overflow.

2. From the Properties panel, type a value for the *flow margin: bottom* property.

The flow margin bottom value sets the ending vertical coordinate where a flowing report ends on each page.

3. From the Properties panel, type a value for the *flow margin: top* property.

The flow margin top value sets the beginning vertical coordinate where a flowing report starts on each new page.

Note: When flow margins are changed from the default value, you can see the flow margins in the Design View of the Document canvas.

4. Adjust the objects in the Design View between the flow margins and run the report.

The report fills each page between the flow margins until it reaches the end.

Procedure: How to Add a New Overflow Page to a Page Layout

Each page layout works independent of any other page layout in the coordinated compound document. This enables you to add a new header and footer for each individual page layout and associated overflow pages. The following procedure describes how to add a new overflow page from the page layout.

You can use any of the following methods to create an overflow page.

- ❑ From a fixed report component in a coordinated compound document.

Select the report component on the page and from the shortcut menu, right-click and select *Customize Fixed Overflow*.

The overflow page, displaying a copy of the fixed component (with the original size and position) from the page layout, is added after the page layout in Design View. This enables you to move and resize the overflow object and add reports and charts (as header and footer information) around the overflowing object.

- ❑ On a page layout with a fixed or flowing report.

From the New Page Layout drop-down list, select *Add New Overflow Page*.

- ❑ Click anywhere on the page layout, right-click and, from the shortcut menu, select *Add New Overflow Page*.

The overflow page is added after the page layout in the Design View. You can add reports and charts to the overflow page.

Note: If there is a flowing report component, any flow margins defined on the page layout will also appear on the overflow page. This enables you to move and resize the flow margins and add reports and charts (as header and footer information) around the flow margins.

The overflow page is identified as Page layout n , overflow object, where n is the number of the corresponding page layout.

Procedure: How to Add Header and Footer Information to the Overflow Page

You can add report and chart components on the overflow page as header and footer information for the overflow data, and position and size the components. You can copy existing components from the page layout, or add new report and chart components. All components added to the overflow page are automatically assigned as fixed components on the overflow page.

Note: The report and chart components added as headers and footers should not generate additional overflow.

1. To copy an existing report or chart component from the page layout:
 - a. Select the component from the original page layout, right-click, and select *Copy*.
 - b. Select Page layout n , overflow object from the Properties panel list, or scroll down in the Design View until you see the overflow page.

The overflow page appears in the layout.

- c. Right-click the current page and click *Paste*.

The component is copied to the overflow page, maintaining the size and position from the page layout.

Note: If the component was flowing on the original page layout, it is automatically changed to a fixed object on the overflow page.

2. To add a new report or chart component to the overflow page:
 - a. From the Properties panel list, select *Page layout n overflow object*.
The overflow page appears in the layout.
 - b. Right-click the current page and select *New Report* or *New Graph*.

Note: You can also add these components through the *Insert* tab.

The pointer changes into a crosshair.

- c. Drag the crosshair to create a report object or a chart object, and adjust it to the size you want.
 - d. Open, import, or reference report or chart information as usual. This behavior is identical to adding a report or chart on the page layout.

Note: Keep in mind that these objects are acting as header and footer information, so they should not generate additional overflow.

3. To edit the report or chart component on the overflow page, double-click the object to open the associated tool and apply any styling or data changes.

Procedure: How to Insert a Dashboard Bar Into the Layout

1. Create a new active dashboard, or open an existing active dashboard.
The active dashboard opens in Document canvas.
2. From the Insert tab, in the Pages group, click *Add Dashboard Bar*.

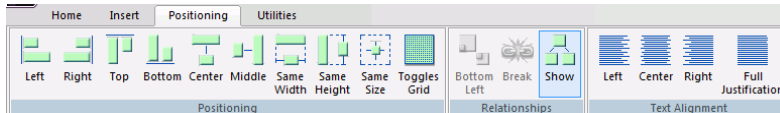
The Dashboard Bar is inserted at the top of the document.

You can insert controls, reports, and charts to appear in the Dashboard Bar above the dashboard tabs.

Note: Though the Dashboard Bar can be a full page, it is not recommended that you insert large reports and charts, as this would make the Dashboard Bar appear to be the same size, or larger, than the dashboard.

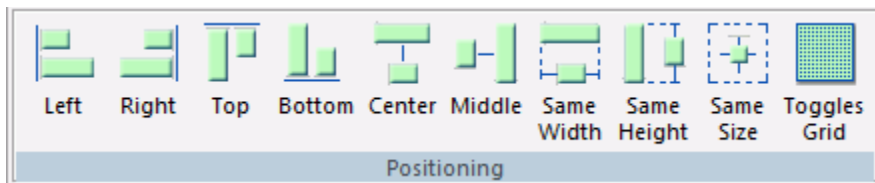
Positioning Multi-Selected Objects in a Document or Active Dashboard Using the Positioning Tab

Positioning options enable you to multi-select objects and position them relative to one another. The Positioning tab contains the Positioning, Relationships, and Text Alignment groups, as shown in the following image.



Positioning Objects in a Document or Active Dashboard Using the Positioning Group

The Positioning group contains the Left, Right, Top, Bottom, Center, Middle, Same Width, Same Height, Same Size, and Toggles Grid commands, as shown in the following image.



Left

Aligns the objects to the left. This works in relationship positioning.

Relates an object to the left of another object.

Right

Aligns the objects to the right. This works in relationship positioning.

Relates an object to the right of another object.

Top

Aligns the objects to the top of the highest selected object. This works in relationship positioning.

Bottom

Aligns the objects to the bottom of the lowest selected object. This works in relationship positioning.

Center

Aligns the objects to the center of the page. This works in relationship positioning.

Aligns objects at the horizontal center point of the object.

Middle

Aligns the objects to the middle of the page. This works in relationship positioning.

Aligns objects at the vertical center point of the object.

Same Width

Makes two or more objects the same width.

Same Height

Makes two or more objects the same height.

Same Size

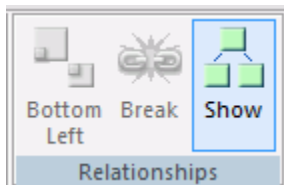
Makes two or more objects the same size.

Toggles Grid

Turns the grid on and off.

Relating Objects on a Page in a Document Using the Relationships Group

The Relationships group contains the Bottom Left, Break, and Show commands. Top Left, Top Right, and Bottom Right commands are available for HTML pages and Guided Report pages. The Relationships group is shown in the following image.



Bottom Left

Relates two or more objects on a page. Two objects must be selected. Relates an object to the bottom left of another object.

Break

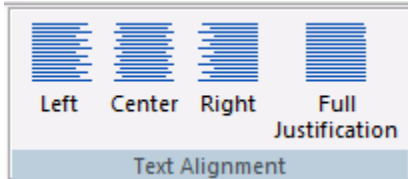
Breaks the relationship between the objects selected.

Show

Shows or hides the relationship between objects.

Aligning Text in a Document Using the Text Alignment Group

The Text Alignment group contains the Left, Center, Right, and Full Justification commands. These commands align text within the text box. The Text Alignment group is shown in the following image.



Left

Aligns selected text to the left.

Center

Aligns selected text to the center.

Right

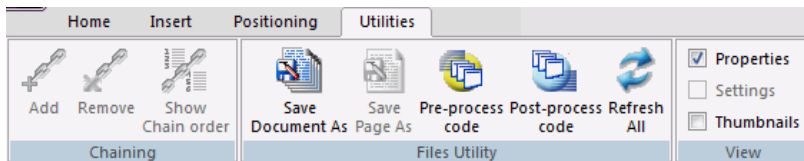
Aligns selected text to the right.

Full Justification

Fully justifies the selected text, meaning that the text fills the width of the text box.

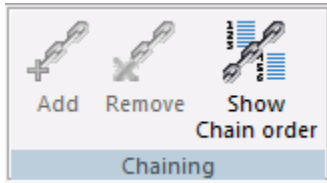
Changing Properties of a Document or Active Dashboard Using the Utilities Tab

You can add or remove chaining in an active report, add pre-process or post-process code to a document or active dashboard, or display or hide the panels associated with a document or active dashboard.



Adding or Chaining Objects in a Document or Active Dashboard Using the Chaining Group

You can add or remove chaining options. The Chaining group is shown in the following image.



The commands are:

Add

Chains two or more objects that are selected in the Parameters tab.

Remove

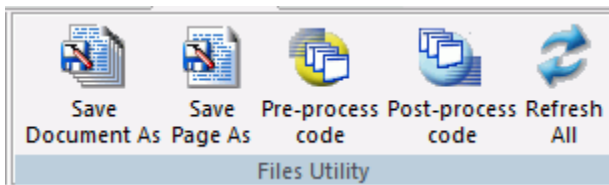
Unchains two or more selected, chained objects in the Parameters tab.

Show Chain order

Shows the order of the chained objects.

Working With the Files Utility Group

You can import and export a page, save a page, and add pre-processing or post-processing code to a document. The Files Utility group is shown in the following image.



The commands are:

Save Document As

Saves the document. This command is available only for a document or active dashboard.

Save Page As

Saves the page you are currently on. This command is available only for a document or active dashboard.

Pre-process code

Creates code that is used before the document is processed. This command is available only for a document or active dashboard.

Post-process code

Creates code that is used after the document is processed. This command is available only for a document or active dashboard.

Refresh All

Refreshes the document.

Procedure: How to Add the Pre-Process Component to a Document

You can create pre-process code that applies to all components added to a document. For example, if the components in your document all require the joining of two tables, you can create pre-process code before adding the components. This feature eliminates the need to create a Join before each component is added to the document.

In addition, you can create post-process code that runs after all of the components have been added to a document.

1. Create a new Document.
2. On the Utilities tab, in the Files Utility group, click *Pre-process code*.

A new canvas and the Procedure View panel open. The new canvas will show the document name, an underscore, and the words, *Pre-process*. For example, if you are applying a pre-process code to Document1, the canvas is titled, *Document1_Pre-Process*.

3. In the Procedure View panel, right-click the procedure folder, point to *New*, and click the name of a procedure component.
4. Create your component, save, and close it.
5. When you are prompted to save the pre-process code changes, click Yes.

Now, you can add components to the document that will use the pre-process code.

Procedure: How to Add the Post-Process Component to a Document

After you have added components to your Document, you can apply post-process code that removes the pre-process code when the procedure is run. For example, if you apply a Join pre-process code, add a report, add a chart, and format the Document, you can apply post-process code that removes the Join when the procedure is run.

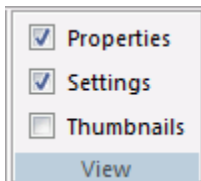
1. On the Utilities tab, in the Files Utility group, click *Post-process code*.

A new canvas and the Procedure View panel open. The new canvas will show the document name, an underscore, and the words, *Post-process*. For example, if you are applying a post-process code to Document1 the canvas will be, *Document1_Post-Process*.

2. In the Procedure View panel, right-click the procedure folder, point to *New*, and click the name of a procedure component.
3. Click *OK*.
4. When you are prompted to save the post-process code changes, click *Yes*.

Viewing Panels Associated With a Document or Active Dashboard Using the View Group

The View group allows you to display or hide the panels associated with a document or active dashboard. The View group is shown in the following image.



The commands are:

Properties

Toggles the visibility of the Properties panel.

Settings

Toggles the visibility of the Settings panel.

Thumbnail

Toggles the visibility of the Thumbnails panel.

Previewing the Document Canvas Using the Thumbnails Panel

The Thumbnails panel contains a preview of what is currently on the canvas. The Thumbnails panel is available when you are using the HTML or Document canvas. The Thumbnails panel is hidden by default. You can display the Thumbnails panel using the View group, on the Utilities tab.

For more information on customizing panels, see [Customizing WebFOCUS App Studio Panels](#) on page 132.

Editing the Properties of the Document Canvas Using the Properties Panel

You can edit the properties of your document in the Properties panel. When the Document canvas is active, the Properties panel displays a list of properties that you can modify.

For example, you change the output format from the type that you may have selected in the HTML/Document Wizard. You can also modify the size of a page, the page orientation, you can add bookmarks, and give each page, including the table of contents page, a title and description.

Procedure: How to Add a Template to a Document

1. On the Home tab, in the Content group, click *HTML/Document*.

The HTML/Document Wizard opens

2. For File Type, select *Document*.
3. Click *Next*.
4. In the Output Format list, choose either *PowerPoint PPT* or *PowerPoint PPTX*.

The Document canvas opens.

5. In the Properties panel, click the drop-down list at the top, and then click *Compound document*.

Note: When using a PPT or PPTX template in a document, the template must be specified at the document level, and not just the component level.

6. Click the ellipsis button next to the Template Name property.

The Open File dialog box opens.

7. Navigate to the template, and click *OK*.

Geographic Information Systems (GIS) enable you to integrate reports with maps and leverage location-based information.

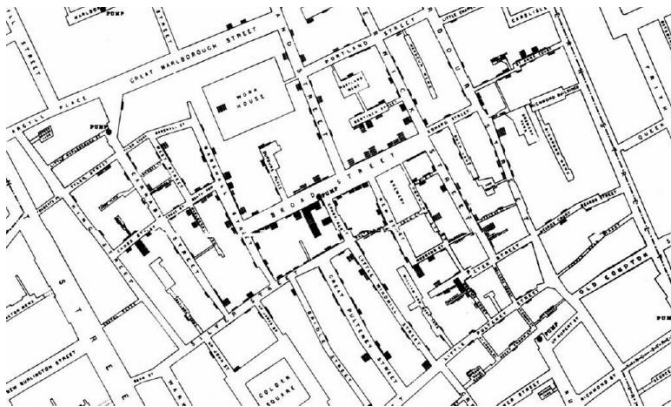
In this chapter:

- ❑ [Creating Maps to Illustrate Trends](#)
- ❑ [Using the WebFOCUS Esri HTML5 Viewer](#)

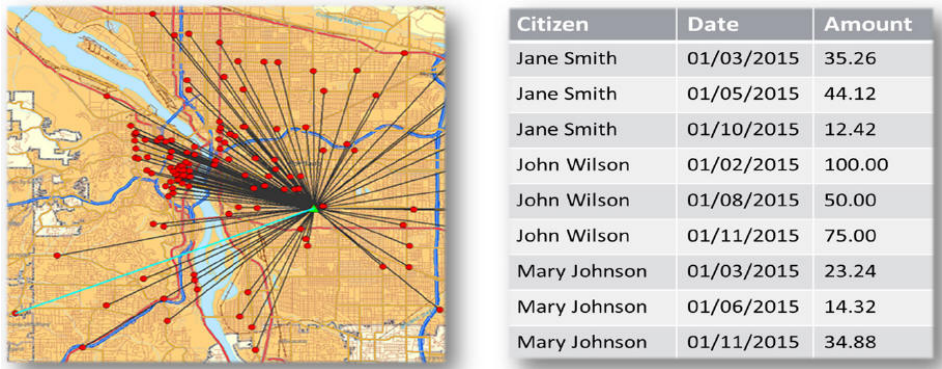
Creating Maps to Illustrate Trends

Using App Studio, you can create maps to identify patterns or trends in your data. By converting data into values that can be displayed on a map, you are able to visualize scenarios, illustrate hot spots, and identify potential problem areas. For example, a law enforcement agency may use mapping functionality to identify areas of higher crime within the locations they cover. You can also use maps to determine how places are related, understand where things are located, and identify the best actions to take. By illustrating trends on a map, a decision maker can identify patterns easily, and reach conclusions sooner.

An early example of how maps can be used to illustrate trends is the case of Dr. John Snow, an epidemiologist who was one of the first to use data to map occurrences of cholera to find the cause of infection. By plotting the cholera data on a map of a town, Dr. Snow was able to visualize a trend that showed higher incidences of cholera closest to water pumps. This example is shown in the following image.



Maps also allow you to measure size, shape, and distribution to detect and quantify patterns, and even perform predictive analytics. An example of how maps can help detect and quantify patterns is the scenario in which a state agency used a WebFOCUS mapping application to solve a problem with their food stamp system. Using this application, odd food stamp redemptions, such as rounded numbers transactions, were discovered. By plotting those transactions on a map, the agency discovered that the redemptions appeared in the same geographic location. Upon further investigation, the agency identified that individuals were selling their food stamps at reduced prices, \$50 worth of food stamps for \$40 in cash, to others instead using them as intended. This map example is shown in the following image.



When working with maps, the concepts of location intelligence and business intelligence are important to understand. A Geographic Information System (GIS) captures, stores, analyzes, manages, and presents data linked to a location, while Business Intelligence (BI) relies on the conversion of raw data into meaningful information. Location intelligence is the process of analyzing data to make better business decisions. It combines GIS and BI/Analytics to allow the recognition of patterns in your data, including the visualization and discovery of geospatial outliers, which would not be easily discovered if you use the technology independently and separately.

More specifically, maps use non-intrusive GIS workflows with existing data. You can view symbol layers for data bound to a geo-location, such as state, country, and ZIP code, in an integrated map viewer. Using metrics from your data, you can also visualize geographic roles or dimensions. Geographic roles, or dimensions, can be built directly into your Metadata or assigned to a data field when you create a map.

Using the WebFOCUS Esri HTML5 Viewer

The Esri HTML5 Viewer for WebFOCUS is based on the Esri ArcGIS JavaScript API. The ArcGIS JavaScript API is a robust API for creating maps with a variety of symbology options, enabling you to embed maps and tasks in web applications. It is supported on all modern browsers on any device.

The App Studio Esri map component allows you to use online content published on ArcGIS Online. ArcGIS Online publishes demographic and feature data that is location related. On the App Studio Esri map component, you can place any number of these data layers on top of a base map (background map image) of your choosing, and configure symbols and colors to highlight any relevant information.

You provide the location dimension for drawing map layers from a standard WebFOCUS report with XML output.

At run time, the map displays with a set of controls that let you show or hide individual layers, change the basemap, access layer tools, and change the map viewing area. In addition, you can add interactive widgets and other WebFOCUS content, including drilldowns to reports and charts, to create complete applications that leverage Esri content.

WebFOCUS automatically gives you access to public content from ArcGIS Online. If you have ArcGIS credentials, you can access any additional content for which you are licensed by signing into your ArcGIS Portal.

ArcGIS Portal is software from Esri that you can deploy either on premises or in the cloud. ArcGIS Online is the Esri Software as a Service offering that represents GIS as a Service and is implemented using the same technology as ArcGIS Portal. Portals allow you to publish and share content over the web.

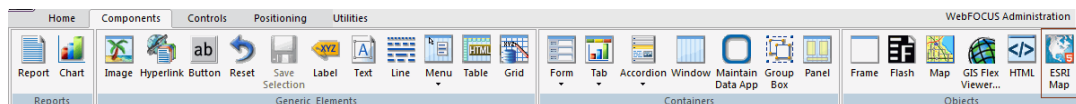
A portal can have users who are unaffiliated with an organization or users who are part of an organization. A portal has users, groups, and content. Users sign in to the portal and create and share content. The system supports different types of items including the following:

- ❑ **Maps.** Web maps can be displayed on all supported platforms (web, mobile, and desktop).
- ❑ **Layers.** Layer types that are supported include feature, map, and image services that can be added as layers in web maps.
- ❑ **Applications.** You can create web and mobile applications whose content is provided by web maps.
- ❑ **Tools.** Your applications can include geocoding, routing, and other task-based services.

- ❑ **Data files.** You can upload, store, download, and, in some cases, activate files to create services (map layers).

Creating an Esri Component on an HTML Page

You insert an Esri map component in an HTML page by clicking the Esri Map button on the right end of the Objects group on the Components tab, as shown in the following image.



After clicking the button, use your mouse to draw an area on the HTML Canvas for the map component.

Configuring the Esri Map Component

Once you insert the Esri map component into the HTML page, you can configure the following properties and objects.

- ❑ The basemap on top of which the feature layers will display.
- ❑ Layers (Esri feature layers).
- ❑ The map view.
- ❑ Geographic role or longitude and latitude for each layer.
- ❑ Symbology using colors, shapes, sizes, and images.

The Esri viewer has widgets available at runtime that provide a table of contents (layer list) and a set of tools for making selections and changing the viewing area on the map.

You have the following options for configuring the map component contents.

- ❑ A map published on your own portal or on ArcGIS.com.
- ❑ The initial spatial extent of the map component (the bounding box for the initial display of the map).

Note: On the Properties panel, the *Map type* property defaults to *Google map*. This property is not relevant to an Esri component and can be ignored in this context.

Reference: Choosing a Basemap

The Miscellaneous options on the Properties pane lets you select one of the following default basemaps:

- ☐ **Light Gray.** Provides a light gray neutral background. This is the default basemap.
- ☐ **Dark Gray.** Provides a dark background that allows the focus to be on other layers.
- ☐ **Imagery.** Provides a detailed World Imagery map layer.
- ☐ **Imagery with Labels.** Provides a detailed World Imagery map layer with labels.
- ☐ **Streets.** Provides a multiscale street map for the world.
- ☐ **Topographic.** Provides a topographic map.
- ☐ **Terrain with labels.** Provides a terrain base map with labels.
- ☐ **National Geographic.** Provides a general reference map from National Geographic.
- ☐ **Oceans.** Provides a background designed to be used as a reference map for ocean data.
- ☐ **Open Street Map.** Provides the OpenStreetMap community map layer.
- ☐ **USA Topo Maps.** Presents land cover and detailed topographic maps for the United States. The TOPO maps are seamless, scanned images of United States Geological Survey (USGS) paper topographic maps.
- ☐ **USGS National Map.** Presents a combination of contours, shaded relief, woodland and urban tint, along with vector layers, such as geographic names, governmental unit boundaries, hydrography, structures, and transportation, to provide a composite topographic base map provided by the USGS Topo base map service from The National Map. Data sources are the National Atlas for small scales, and The National Map for medium to large scales.

Reference: Defining the Esri Component Layers

To define the layers that will display on your map component, you use the ESRI Object Settings panel, shown in the following image:

Settings

ESRI Object Settings

Layers

Layer1

Request

Geographic

Column(s) that match the role

Layer Attributes

Unique Id

...

Layer Visualizations

Transparency	50
Enable Popups	Off
Default Visibility	On
Default Extent	Off

Symbol Settings

Use

Single

Color

Outline Color

Outline Thickness

1

Outline Style

Solid

On this panel, you configure:

- ☐ The layers that will display on your map component.
- ☐ The visualizations for each layer.
- ☐ The symbology used for each layer.

Configuring a Map Data Layer

For each data layer that you place on your map component, you create an external WebFOCUS request that generates location or point values and any other values you want to use on your layer. The request must provide these values to the browser in XML format. You add this request to the map component in the Requests & Data Sources panel.

In the top section of the ESRI Object Settings panel, you configure the geographic role, the external request to be used for the geographic values of interest, and attributes for the layer.

Descriptions of the layer settings in the ESRI Object Settings panel follow.

Layers

Description. Is a unique name for the layer.

Type of field. Textfield VARCHAR2(20).

Required? Yes.

Populated by. User.

Limits. Maximum length = 20 characters. Special characters (' " \ / * + ? ^ \$ [] () { } < > | & ,) are not allowed.

Example. Customer

Request

Description. Name of the request that provides locations or points.

Type of Field. Drop-down list.

Required? Yes.

Populated by. System defined.

Limits. Defined earlier in the Requests & Data Sources panel to an external WebFOCUS Procedure that outputs the values to the browser in XML format.

Example. customer_locations

Geographic Role

Description. Geography lookup column. For more information, see [Using Geographic Roles](#) on page 682.

Type of Field. Drop-down list.

Required? Yes.

Populated by. System Defined.

Limits. Choices are:

- ☐ Point of Interest (Latitude/Longitude)
- ☐ City
- ☐ Continent
- ☐ Country (Name)
- ☐ Country (ISO two-letter code)
- ☐ State
- ☐ US city
- ☐ US County
- ☐ US state (Name)
- ☐ US state (Abbreviation)
- ☐ US postal code (3 digits)
- ☐ US postal code (5 digits)
- ☐ You can also add a custom geographic role, as described in [Adding a Custom Geographic Role](#) on page 743. Private custom geographies will only be available after authenticating against ArcGIS Online credentials.

Example. Latitude/Longitude

Column(s) that match the role

Description. Column or columns in the request that will provide values for the geographic role.

Type of Field. Drop-down list box.

Required? Yes.

Populated by. System Defined.

Limits. Must be fields that are available in the request.

Example. LATITUDE/LONGITUDE

Unique ID

Description. This is the field that will be used as a parameter for other requests.

Type of Field. List box.

Required? Yes, for Point of Interest layers, no otherwise.

Populated by. System defined.

Limits. Must be a field available in the request.

Example. ID_CUSTOMER

Layer Attributes

Description. These are fields in the request that will appear in pop-ups when a point or location is clicked and the Enable Popups visualization is turned on.

Type of Field. List box.

Required? No.

Populated by. System defined.

Limits. Must be fields available in the request.

Example. COGS_US

Example: Configuring a Point of Interest Map Layer

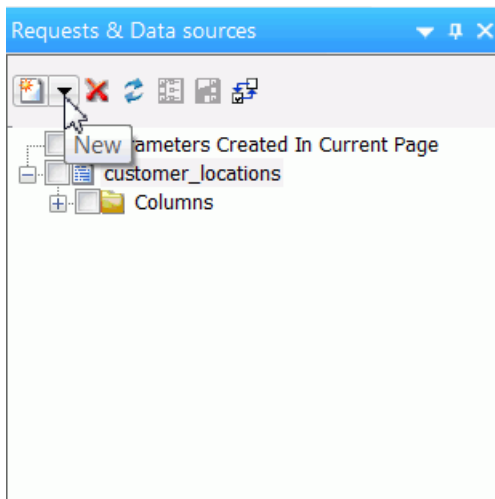
This example configures a map layer using longitude and latitude point values that come from an external WebFOCUS request named `customer_locations.fex`.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

Following is the syntax for the customer_locations procedure. Note that the fields that return the longitude and latitude values must be named LONGITUDE and LATITUDE, and that a request that returns these values for the geographic points must also have a unique ID field, in this case ID_CUSTOMER. The values must be returned to the browser in XML format. Paste this procedure into the Text Editor and save it as customer_locations.fex:

```
TABLE FILE WF_RETAIL_LITE
SUM ID_CUSTOMER COGS_US
    QUANTITY_SOLD
    COMPUTE LONGITUDE/D12.2 =CUSTOMER_LONGITUDE;
    COMPUTE LATITUDE/D12.2 = CUSTOMER_LATITUDE;
BY STATE_PROV_NAME
BY ID_CUSTOMER NOPRINT
WHERE COUNTRY_NAME EQ 'United States';
ON TABLE PCHOLD FORMAT XML
END
```

First, add the external WebFOCUS procedure customer_locations.fex to the HTML page using the Requests & Data Sources panel, as shown in the following image:

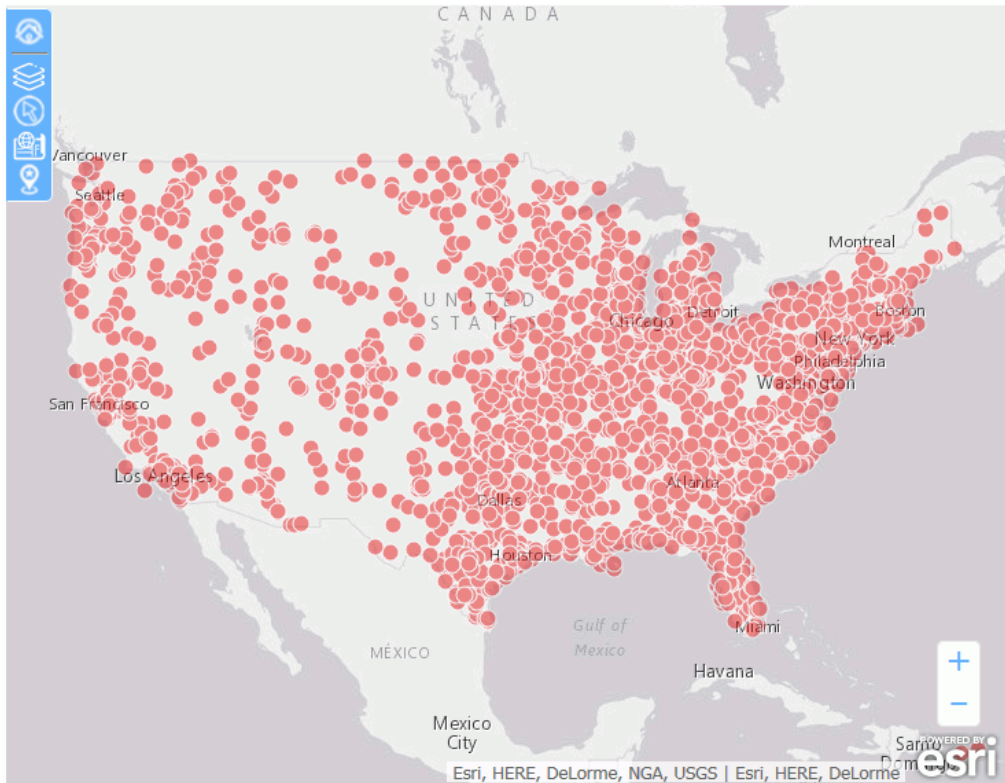


Next, use the Settings panel to configure the map layer. The layer uses the default visualizations and symbology, so only the top portion of the ESRI Object Settings panel needs to be configured.

Each layer has a default name. To change the layer name, select and type over the default name. The geographic role to use when you provide latitude and longitude values in your request is called Point of Interest. The following image shows the configured Customers layer with the layer name changed and the geographic role configured:

Layers	<input type="text" value="Customer"/>	
Request	<input type="text" value="customer_locations"/>	
Geographic	<input type="text" value="Point Of Interest"/>	
Column(s) that match the role	<input type="text" value="X/Y"/>	<input type="text" value="LATITUDE/LONGITUDE"/>

Run the HTML page. The output is shown in the following image:



Example: Configuring a US State Map Layer

This example configures a map layer using U.S. state names.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

Following is the syntax for a WebFOCUS procedure that returns the state name for U.S. states. Paste this procedure into the text editor and save it as customer_states.fex.

```
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE PCHOLD FORMAT XML
END
```

First, add the external WebFOCUS procedure customer_states.fex to the HTML page using the Requests & Data Sources panel.

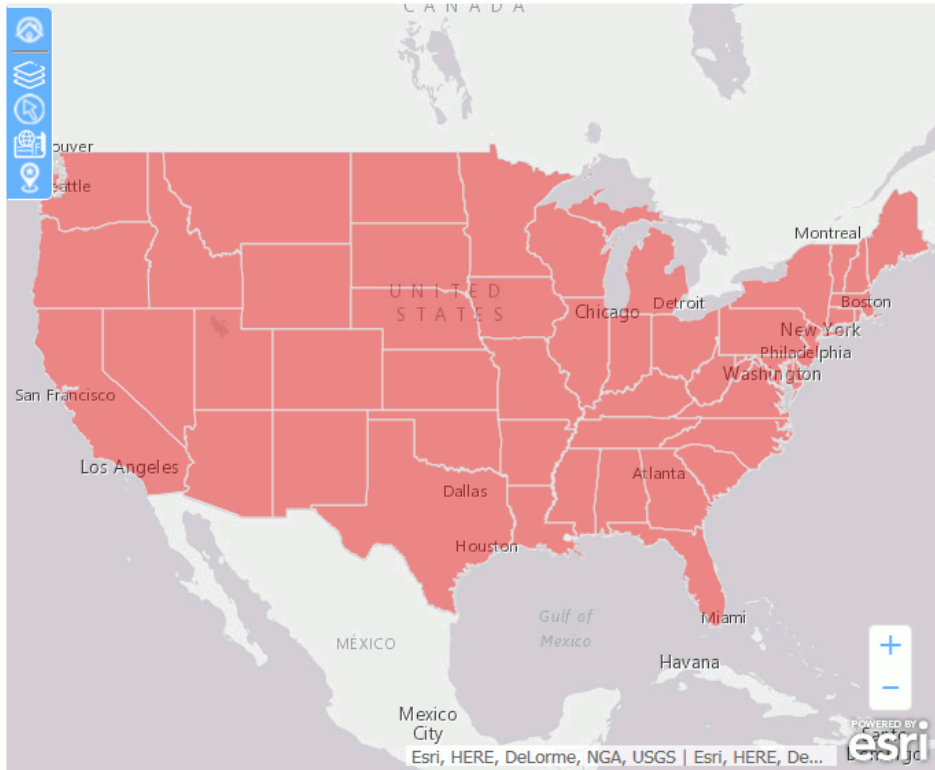
Next, use the Settings panel to configure the map layer. The layer uses the default visualizations and symbology, so only the top portion of the ESRI Object Settings panel needs to be configured.

Each layer has a default name. To change the layer name, select and type over the default name. The geographic role to use when you provide U.S. state names in your request is called US state (Name). The field in the request that matches the geographic role is STATE_PROV_NAME. The following image shows the configured CustState layer:

The screenshot shows a configuration panel with the following elements:


- Layers:** A text input field containing "CustState".
- Request:** A dropdown menu with "customer_states" selected.
- Geographic:** A dropdown menu with "US state (Name)" selected.
- Column(s) that match the role:** A table with two columns: "STATE_NAME" and "STATE_PROV_NAME".








Run the HTML page. The output is shown in the following image:



Using Map Widgets

When you generate a map, a set of map widgets is generated that let you interact with the map output. The following table describes each widget.

Widget Name	Image	Description
Default Extent		Toggles between the default extent (entire layer) and the extent that includes the majority of points for the layer.

Widget Name	Image	Description
Table of Contents		Opens a list of layers, their properties, and an icon for opening a set of layer tools. The tools differ depending on the type of layer. In the layer list, this widget toggles between showing the list and hiding the list.
Selection Tools		Provides selection tools and options based on the layer type.
Change Base Map		Opens thumbnails of the available map base layers and lets you select a new one.
Find my location		Zooms the map to your current location.
Zoom in		Increases the zoom level.
Zoom out		Decreases the zoom level.
Close		Closes the widget.

Reference: Layer Tools and Options

The following shows the options for a polygon layer in the table of contents:



The following shows the options for a point layer in the table of contents:







The visible icons when you first open this widget are:




- ❑ A polygon or point, which identifies this layer as a layer with polygon or point geometry.
- ❑ A check box for showing or hiding the layer on the map.
- ❑ The layer name.
- ❑ The Show Tools icon. Clicking this icon toggles the tools widgets on and off.

The following image shows the table of contents widget with the tools widgets toggled on:



Option Name	Image	Description
Show tools		Toggles the layer tools widgets on and off.
Toggle layer legend		Toggles the layer legend on and off. The layer legend shows the fields, markers, colors, and sizes represented on the map layer. For example: <div data-bbox="854 1007 1197 1313" data-label="Image"> </div>
Toggle options		Shows or hides the layer visualization options.
Zoom to layer extent		Zooms to the extent configured for the layer.

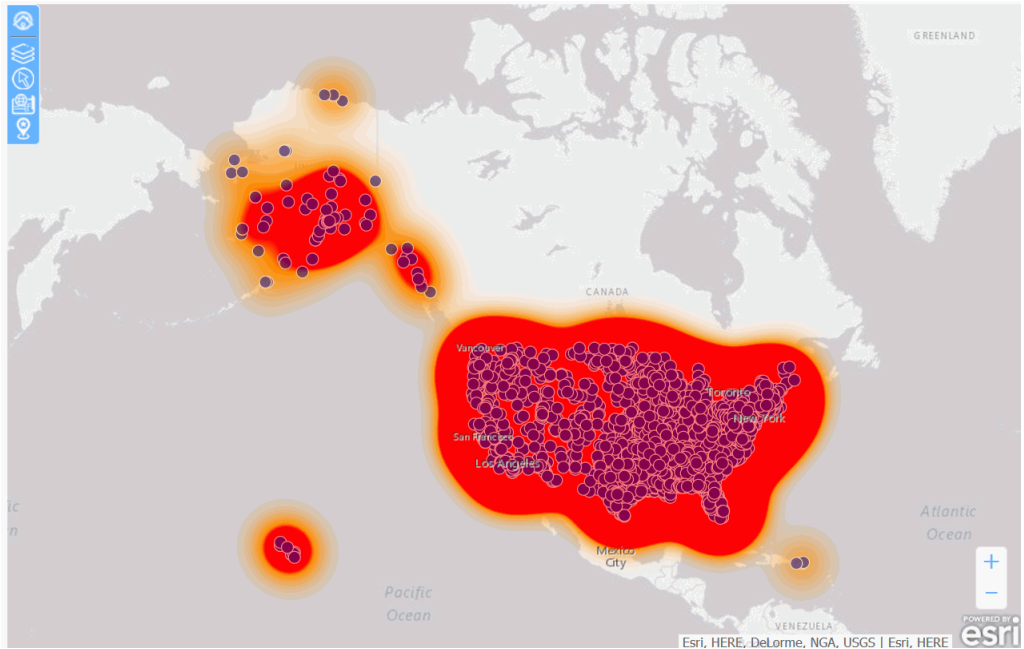
The following layer options are available.

Option Name	Image	Description
Opacity slider		Enables you to adjust the layer transparency.
Cluster (points only)		<p>Click the button to invoke clustering (markers are combined into cluster markers, depending on the range of points they represent and the zoom).</p> <p>A green button on the right shows that this option is selected.</p>
Heat layer (points only)		<p>Click the button to draw a heat map depicting the concentration of points. The areas of highest concentration will be red, the next highest will be yellow.</p> <p>A green button on the right shows that this option is selected.</p>

The following image shows cluster markers. The points are categorized into ranges and the cluster markers are colored according to the range of points they represent.



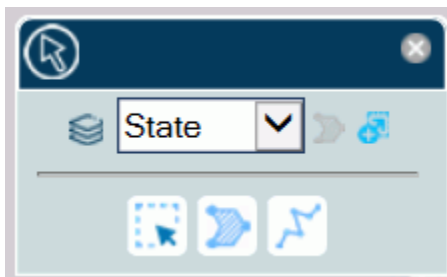
The following image shows a heat layer.



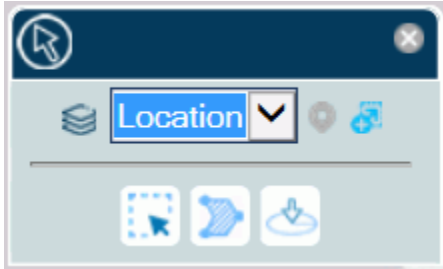
Reference: Selection Tools and Options

The selection widget has a drop-down list for selecting the layer on which to make a selection.





The following image shows the selection tools for a polygon layer.








The following image shows the selection tools for a point layer.



The following selection tools and options are available.

Option Name	Image	Description
Zoom to layer extent		Zooms to the extent configured for the layer.
Select features within an extent		Selects map points or locations included in a rectangle. To draw a rectangle, drag from the starting position to the ending position on the map and release the mouse pointer.
Select features within a polygon		Selects map points or locations included in a polygon. To draw a polygon, click each position on the map where you want a vertex. Double-click to complete the polygon at the last vertex you want to add.
Select features within a distance (point geography only)		When this option is selected, a distance text box opens. You can select miles or kilometers from a drop-down list, and enter a distance. When you double-click a point, the map zooms to show the points at that distance around the selected point.

Option Name	Image	Description
Select features intersecting a line (polygon geography only)		Selects polygons that intersect a line. To draw a line, click at the starting position, and double-click at the ending position.
Select features to delete		Deletes previously selected points or locations within a rectangle that you draw over selected points or locations.
Pan		Switches from making selections to panning when you click and drag on the map layer.
Clear selection		Clears all selections.
Zoom to Selection		Identifies the number of points or locations selected. If you click this button, the map zooms in to the selection.

Using Geographic Roles

Geographic roles are configured on the Reporting Server in the home/catalog/geo_services.xml file. A geographic role can be available in multiple formats, such as a name, an abbreviation, and an ISO code. For each geographic role and format selected in the ESRI Object Settings panel, the server returns a GEO_ROLE value that will be used to retrieve map data from Esri.

The following table lists the geographic roles and formats configured on the server.

ROLE_NAME_TITLE	ROLE_FORMAT_TITLE	GEO_ROLE
City	Name	CITY
Continent	Name	CONTINENT

ROLE_NAME_TITLE	ROLE_FORMAT_TITLE	GEO_ROLE
Country (Name)	Name	COUNTRY
Country (ISO 2 letter code)	FIPS code	COUNTRY_FIPS
	ISO 2 letter code	COUNTRY_ISO_CC
County	FIPS code	COUNTY_FIPS
Postal Code	.	POSTAL_CODE
State	FIPS code	STATE_FIPS
	Name	STATE
US State (Name)	Name	USSTATE
US State (Abbreviation)	Abbreviation	USSTATE_ABBR
	US ISO subdivision code	STATE_ISO_SUB
US City	Name	USCITY
US County	Name	USCOUNTY
US Postal Code	3 digits	ZIP3
	5 digits	ZIP5

The server also configures the Esri endpoints (URLs) to the map data for each geographic role.

The server adds parameters in the edahome/catalog/geo_services.xml file that will be used for matching the columns in the WebFOCUS request to each georole, as described in the following table.

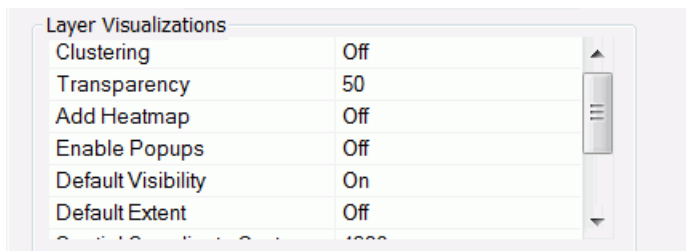
Returned Georole	Description	Parameter Name
CITY	World Cities	CITY_NAME
		ADMIN_NAME
		CNTRY_NAME
		FIPS_CNTRY

Returned Georole	Description	Parameter Name
CONTINENT	World Continents	CONTINENT
COUNTRY	World Countries	Country
COUNTRY_ISO_CC	World Countries (by CC)	ISO
STATE	World Admin Divisions	NAME COUNTRY ISO_CC
STATE_ISO_SUB	World Admin Divisions (by ISO_SUB)	ISO_SUB COUNTRY ISO_CC
USCITY	USA Major Cities	NAME ST
USCOUNTY	USA_Counties_Generalized	NAME STATE_NAME
USSTATE	USA_States_Generalized	STATE_NAME
USSTATE_ABBR	USA_States_Generalized (by abbreviation)	STATE_ABBR
ZIP3	USA ZIP3	ZIP3
ZIP5	USA ZIP5	ZIP

Configuring Layer Visualizations

The visualizations available in a map layer depend on the layer type.

The following image shows the Layer Visualizations section of the ESRI Object Settings panel.



A list of layer visualizations you can configure in the Layer Visualizations section of the ESRI Object Settings dialog box follows.

Clustering

Description. Enables clustering (grouping of symbols) on the selected layer.

Type of Field. Boolean.

Populated by. User.

Limits. On/Off. Default is Off.

Example. On

Transparency

Description. Transparency of the layer.

Type of Field. Numeric.

Populated by. User.

Limits. Values 0 - 100. 100 is 100% opaque, and 0 is 100% transparent. Default is 50.

Example. 50

Add Heatmap

Description. Applies to Point of Interest and Cities geographic roles. Colors the areas around the points using a gradient in which the intensity of the color is based on the concentration of points.

Type of Field. Boolean.

Populated by. User.

Limits. On/Off. Default is Off.

Example. Off

Enable Popups

Description. Shows an InfoWindow with the values of the layer attribute fields when a polygon or point is clicked.

Type of Field. Boolean.

Populated by. User.

Limits. On/Off. Default is Off.

Example. Off

Default Visibility

Description. Makes the layer initially visible or not visible.

Type of Field. Boolean.

Populated by. User.

Limits. On/Off. Default is On.

Example. On

Default Extent

Description. If Default Extent is Off, the map view is the extent of the first layer loaded. If it is On, the map view is the full layer. The map extent is determined as follows:

- ☐ If there are no layers, the extent is the entire map.
- ☐ If any layer is configured with the default extent, the extent is determined by that layer data.
- ☐ If there are one or more layers and no layer is configured with the default extent, the extent is determined by the data for the first layer.

Type of Field. Boolean.

Populated by. User.

Limits. On/Off. Default is Off.

Example. Off

Spatial Coordinate System

Description. Is the id of coordinate system used by the WebFOCUS procedure to provide geographic data. For information about coordinate systems available with Esri, see https://developers.arcgis.com/javascript/jshelp/ref_coordsystems.html.

Type of Field. ID.

Populated by. User.

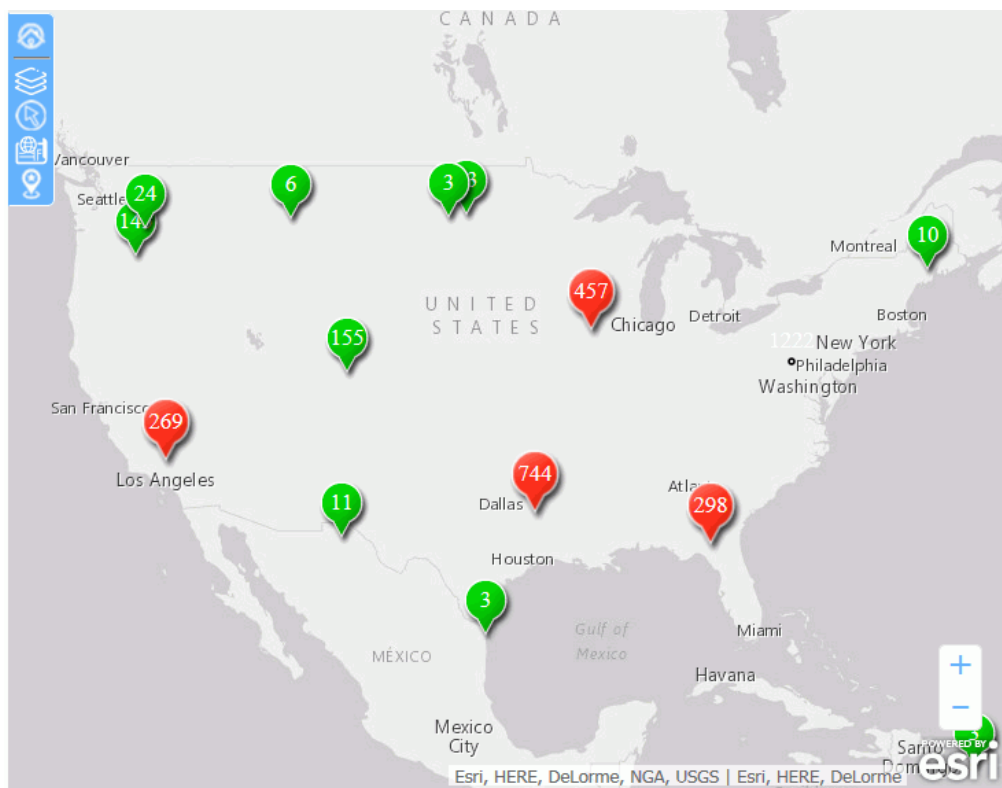
Limits. Default option is decimal degrees (id=4326).

Example. 4326

Example: Enabling Clustering

If you turn on Clustering in the Layer Visualizations section of the ESRI Object Settings panel, groups of markers will be combined into one cluster icon, with the number of individual markers included shown on the icon. The markers are categorized into ranges, and the cluster markers are colored according to the range of markers they represent.

Using the customer_locations procedure described in [Configuring a Map Data Layer](#) on page 669, run the HTML page. The output is shown in the following image:

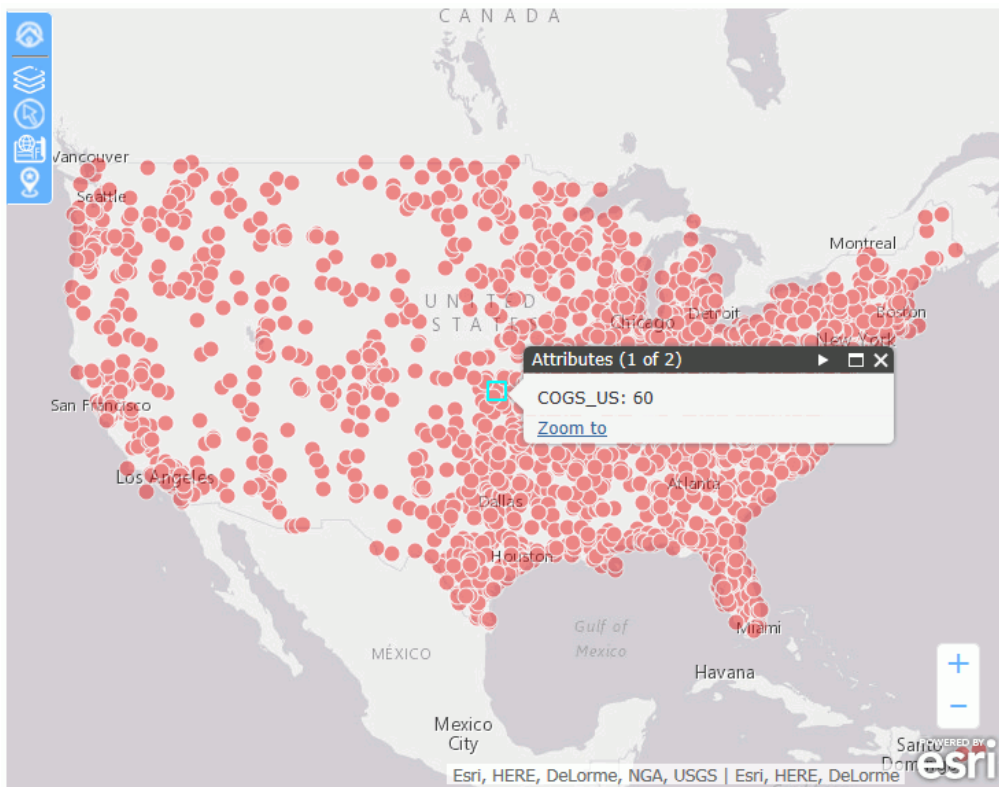


The clusters change as you zoom the map.

Example: Enabling Popups

When you enable popups in the Layer Visualizations section of the ESRI Object Settings panel, and you click a marker or polygon, an InfoWindow opens that shows additional information for the map layer drawn. This popup is dependent on the layer attributes enabled at design time.

The following image shows an InfoWindow for a marker on the map layer:



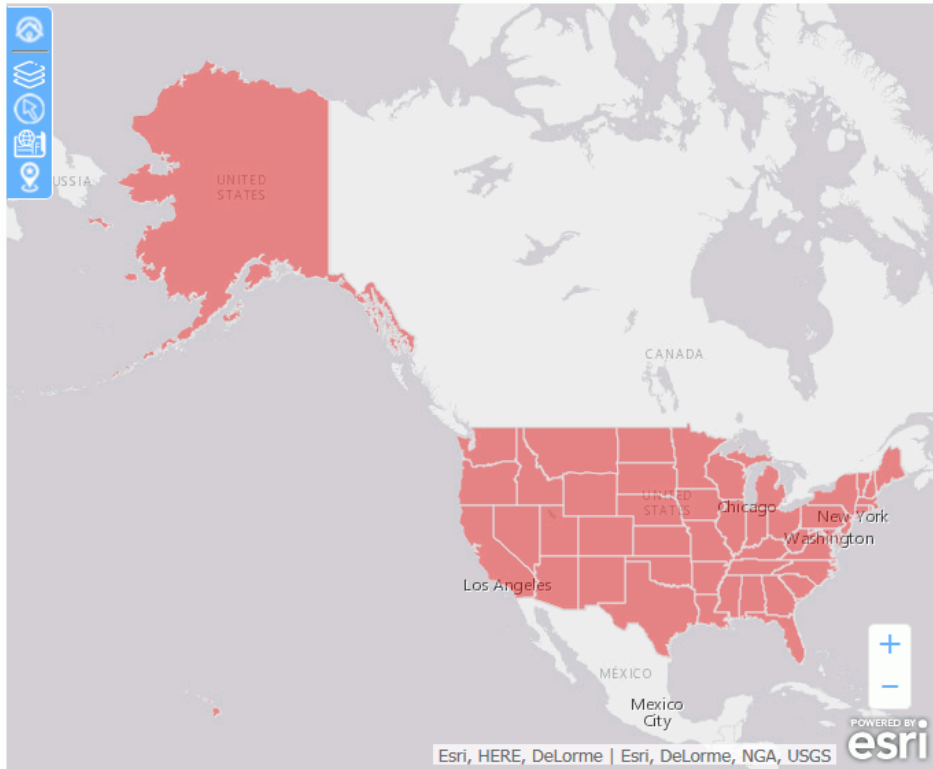
To close the InfoWindow, click the X in the header or click another marker.

Clicking *Zoom to* zooms in the map to the location of the clicked marker.

Example: Enabling the Default Extent

With the Default Extent visualization Off (the default), the initial view of the layer shows an area determined by the map engine to contain the bulk of the geographic values returned by the WebFOCUS request. If you turn Default Extent On, the initial view will show the entire map layer.

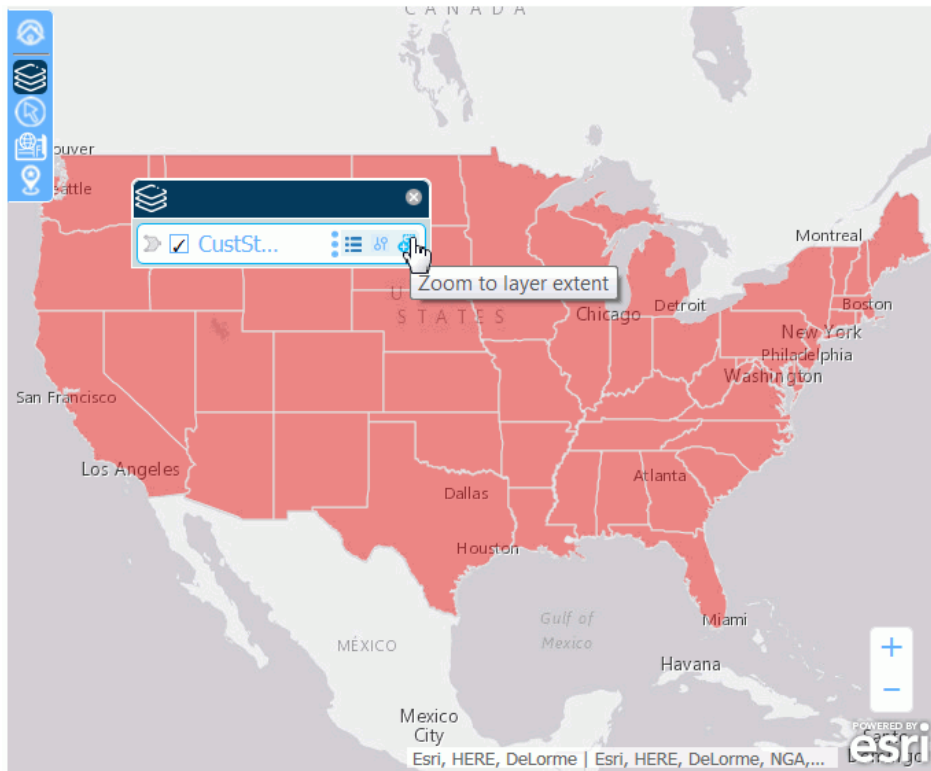
The following image shows the layer extent initially drawn when Default Extent is turned On in the Layer Visualizations section of the ESRI Object Settings panel.



You can zoom to the default extent using the Default Extent control, shown in the following image.



You can zoom to the layer extent using the Table of Contents control, shown in the following image.



Configuring Symbolology for a Data Layer

The symbolology available for a layer depends on the type of layer and on whether the geographic data provided to the layer consists of points (X/Y values in either decimal degrees or other units) or polygons (geographic areas).

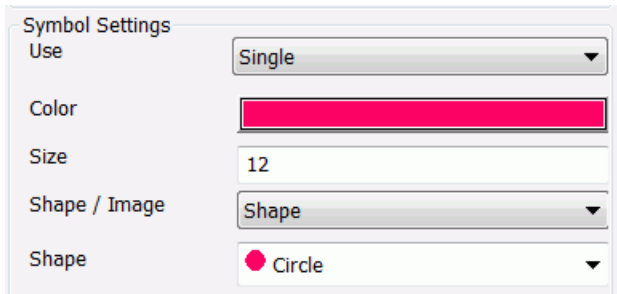
When the geographic data consists of points, each point is represented by a marker on the map. Each marker can be drawn using a standard shape or an image file. Markers can be assigned a size and can be colored based on several classification schemes, using any metrics.

When the geographic data defines polygons, the areas on the map representing each polygon can be colored based on several classification schemes, using any metrics, and can have an outline that consists of a color, a thickness, and a line style.

Configuring Symbology for a Point Data Layer

Geographical point data places markers on the map layer that can be configured with a wide range of shape, size, color, and image options.

The following image shows the Symbol Settings section of the ESRI Object Settings panel for a point-based data layer. Some selections may open additional options not shown in this image.



The following table summarizes the types of symbology available for a point layer. Each type of symbology is illustrated in one of the sections that follows.

Type of Symbol (Subtype)	Description	Configuration Fields
Single (Shape)	User selects from a list of marker shapes.	<p>Use. Selects the type of symbols, <i>Single</i> for this option.</p> <p>Color. User selects a marker color. The default is red.</p> <p>Size. User specifies the marker size in pixels. The default is 12.</p> <p>Shape/Image. Select <i>Shape</i> for this option.</p> <p>Shape. User selects one of the following marker shapes:</p> <div><input type="checkbox"/> Circle (default)</div> <div><input type="checkbox"/> Cross</div> <div><input type="checkbox"/> Diamond</div> <div><input type="checkbox"/> Square</div> <div><input type="checkbox"/> X</div> <p>For more information, see Configuring Point Symbology Using a Single Standard Shape on page 696</p>
Single (Image)	User provides an image source for the markers.	<p>Use. Selects the type of symbols, <i>Single</i> for this option.</p> <p>Color. N/A. The image has its own colors.</p> <p>Size. User specifies the marker size in pixels. The default is 12.</p> <p>Shape/Image. Select <i>Image</i> for this option.</p> <p>Image Source. User must provide the path to the image.</p> <p>For more information, see Configuring Point Symbology Using a Single Image File on page 698</p>

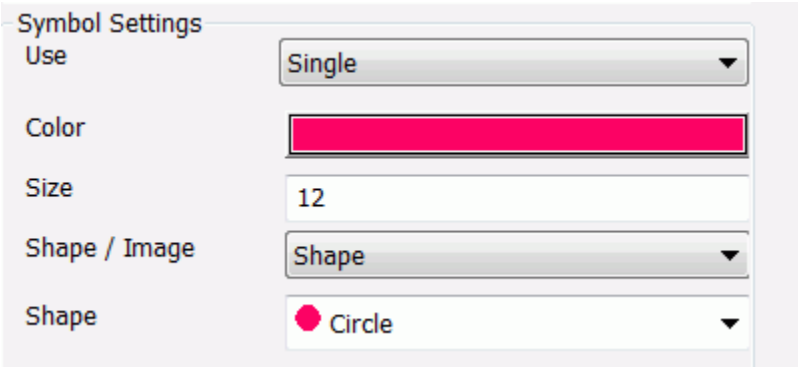
Type of Symbol (Subtype)	Description	Configuration Fields
Color	User specifies a field to be used to classify marker colors.	<p>Use. Selects the type of symbols, <i>Color</i> for this option.</p> <p>Using Field. User selects a field in the request to be used to classify the markers by color.</p> <p>By. User selects from the following classification methods.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Natural Jenks (the default). <input type="checkbox"/> Quantile. <input type="checkbox"/> Equal Breaks. <input type="checkbox"/> Standard Deviation. <input type="checkbox"/> Geometrical Breaks. <p>Number of Classes. User specifies the number of color breaks. The default is 5.</p> <p>Color Scheme. User selects the color palette for the markers. The default uses shades of green.</p> <p>For more information, see Configuring Point Symbology Using Color on page 700</p>
Size	User specifies a field to be used to size the markers.	<p>Use. Selects the type of symbols, <i>Size</i> for this option.</p> <p>Using Field. User selects a field in the request to be used to classify the markers by size.</p> <p>Color. User selects a color for the markers.</p> <p>For more information, see Configuring Point Symbology Using Size on page 702</p>

Type of Symbol (Subtype)	Description	Configuration Fields
Dynamic	The WebFOCUS request that provides the location dimension defines the marker properties.	<p>Use. Selects the type of symbols, <i>Dynamic</i> for this option.</p> <p>Label. User specifies a field in the request that contains the label text for the legend. The default is the AS name, title, or field name.</p> <p>Color. User specifies a field in the request that defines the colors for the markers. Not supported when marker images are used, as each image has its own colors.</p> <p>Size. User specifies a field in the request that defines the sizes in pixels for the markers. The default is 12.</p> <p>Image Source. User specifies a field in the request that contains the path to the marker images.</p> <p>For more information, see Configuring Dynamic Point Symbology on page 704</p>

Type of Symbol (Subtype)	Description	Configuration Fields
Unique	User selects marker properties for each value of a dimension in the request.	<p>Use. Selects the type of symbols, <i>Unique</i> for this option.</p> <p>Using Field. User selects a dimension in the request and assigns marker properties for each value.</p> <p>Size. User specifies a size in pixels for the markers. The default is 12.</p> <p>Shape / Image. User can select a standard shape or specify an image source for the markers.</p> <p>Dimension Values box. A box is populated with the dimension values. The user can select values and move them to the right, then assign marker properties to those selected values.</p> <p>Label. User specifies text to display in the legend for each selected dimension value.</p> <p>Color. If Shape is the selected marker type, the user selects a color for each selected dimension value.</p> <p>Shape. If Shape is the selected marker type, the user selects a standard shape for each selected dimension value.</p> <p>Image Source. If Image is the selected marker type, the user specifies an image source for each selected dimension value.</p> <p>For more information, see Configuring Unique Symbology for Points on page 707</p>

Configuring Point Symbology Using a Single Standard Shape

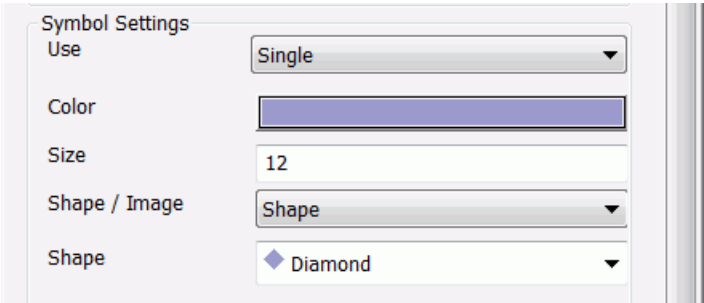
The default symbol used for points is a 12-pixel red circle, as shown in the following image.



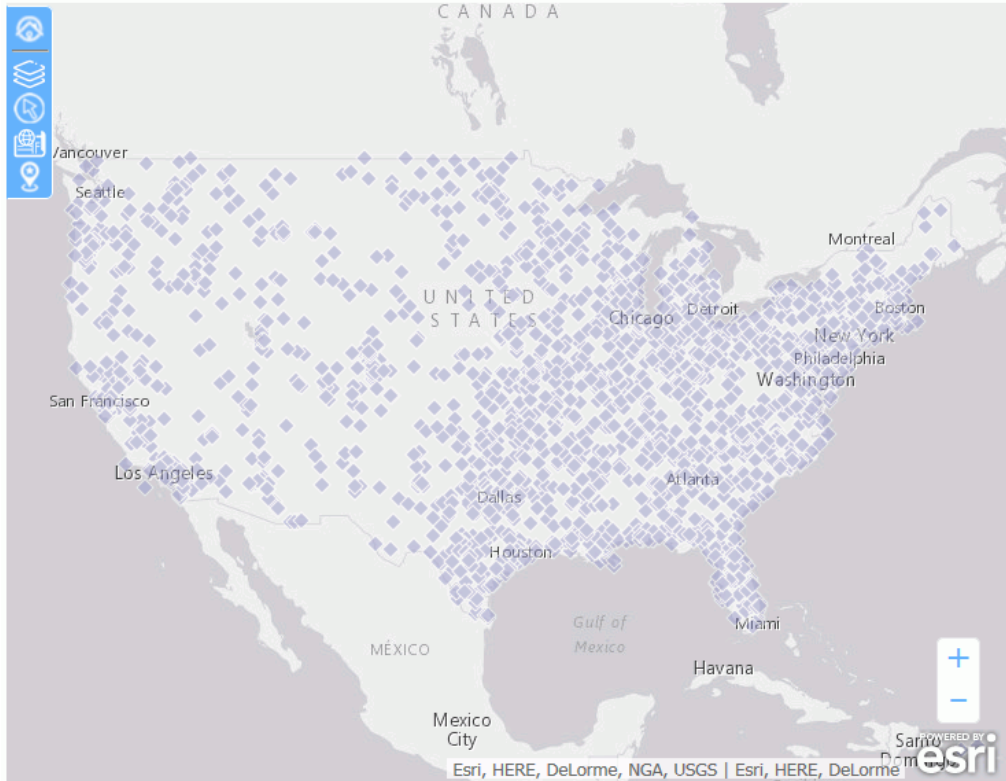
You can open a color picker dialog box by clicking the Color field, can enter a size in pixels, and select a different shape (square, diamond, cross, or X).

Example: Configuring Point Symbology Using a Standard Shape

This example uses a blue diamond symbol as the marker. The following image shows the symbol settings. The external WebFOCUS request used to provide the point data is the customer_locations procedure created in [Configuring a Map Data Layer](#) on page 669. The geographic role is Point of Interest, and the fields that match the role are LATITUDE/LONGITUDE.

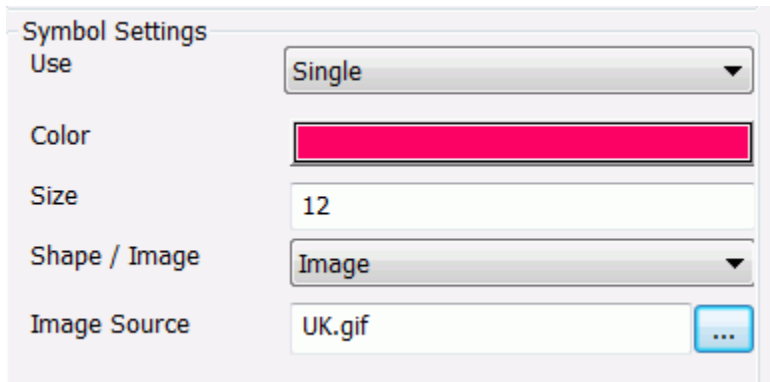


Run the HTML page. The output is shown in the following image.



Configuring Point Symbology Using a Single Image File

You can select a valid image file to use as the marker for point data and specify its size, as shown in the following image.



Symbol Settings

Use: Single

Color: [Red color swatch]

Size: 12

Shape / Image: Image

Image Source: UK.gif [...]

Selecting a color has no effect on the output, as the image file is placed on the points with no manipulation, except for size.

The symbol can be located on your machine or at a URL reference.

Example: Configuring Point Symbology Using an Image File

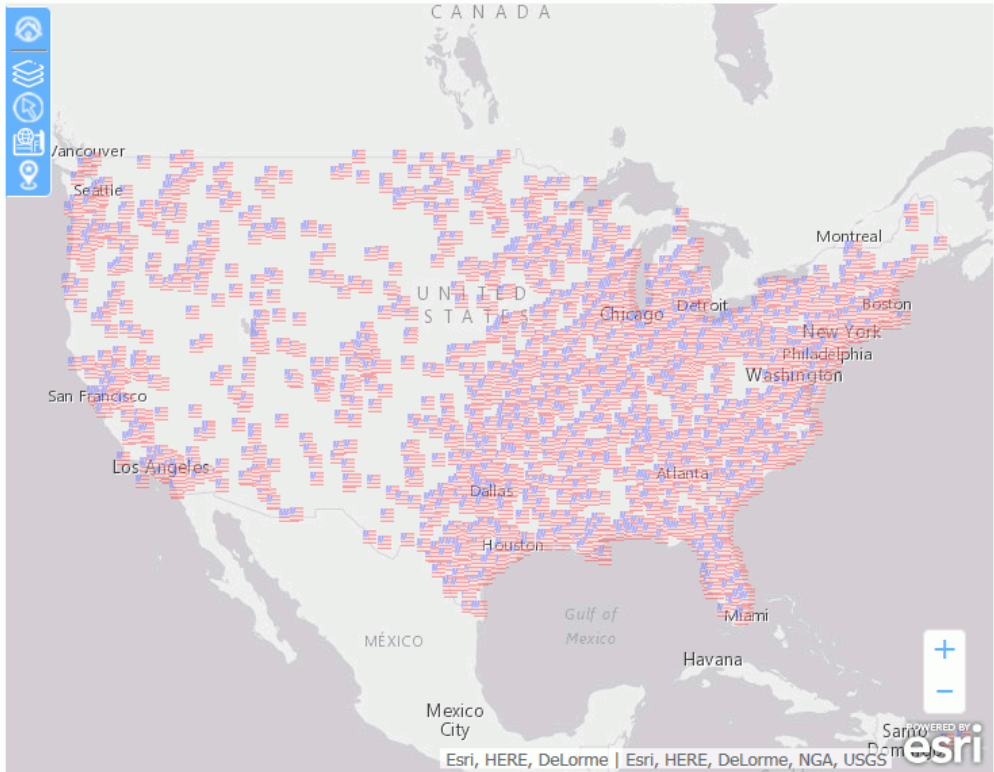
The following example uses a US flag as the symbol for the Customer layer.

In the Symbol Settings section of the ESRI Object Settings panel, select *Single* in the Use drop-down list and *Image* in the Shape / Image drop-down list.

Enter the following URL in the Image Source box.

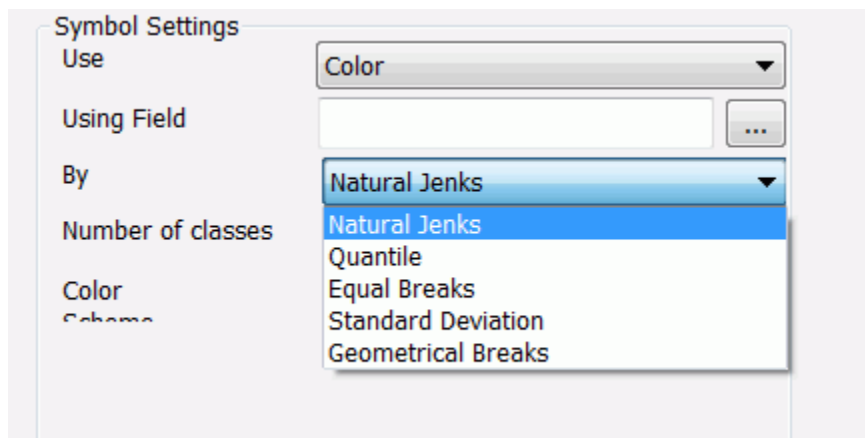
<http://documentation.ibi.com/jschart/us.gif>

Run the HTML page. The output is shown in the following image.



Configuring Point Symbology Using Color

When you select *Color* in the Symbol Settings Use drop-down list of the ESRI Object Settings panel, the markers are colored using a choice of color classification systems, as shown in the following image.



Using Field

Description. This is a numeric field in the request whose values will be used by the classification schema to define the class breaks.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one field. It should be a measure field or numeric.

Number of Classes

Description. This is the number of class breaks that will be rendered.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select values 2 through 9. The default is 5.

By

Description. This is the classification scheme to be used for assigning the breaks and ranges.

Type of field. Drop-down list.

Populated by. User.

User limitations. Choices are:

- ☐ **Natural Jenks**, a classification scheme that uses breaks inherent in the data, grouping similar values and maximizing differences between groups. This is the default choice.
- ☐ **Quantile**, a classification scheme in which each class contains an equal number of points.
- ☐ **Equal Breaks**, a classification scheme that breaks the data into equal ranges of values.
- ☐ **Standard Deviation**, a classification scheme that defines the breaks based on the number of standard deviations from the mean.
- ☐ **Geometrical Breaks**, a classification scheme that bases class breaks on intervals that have a geometrical series.

Color Scheme

Description. This lets you select an array of color values, defining the color ramp. The first color will be used to render the minimum data class, and the last color will be used to render the maximum data class.

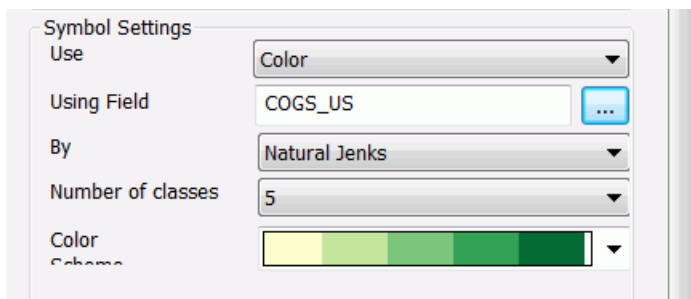
Type of field. Drop-down list.

Populated by. User.

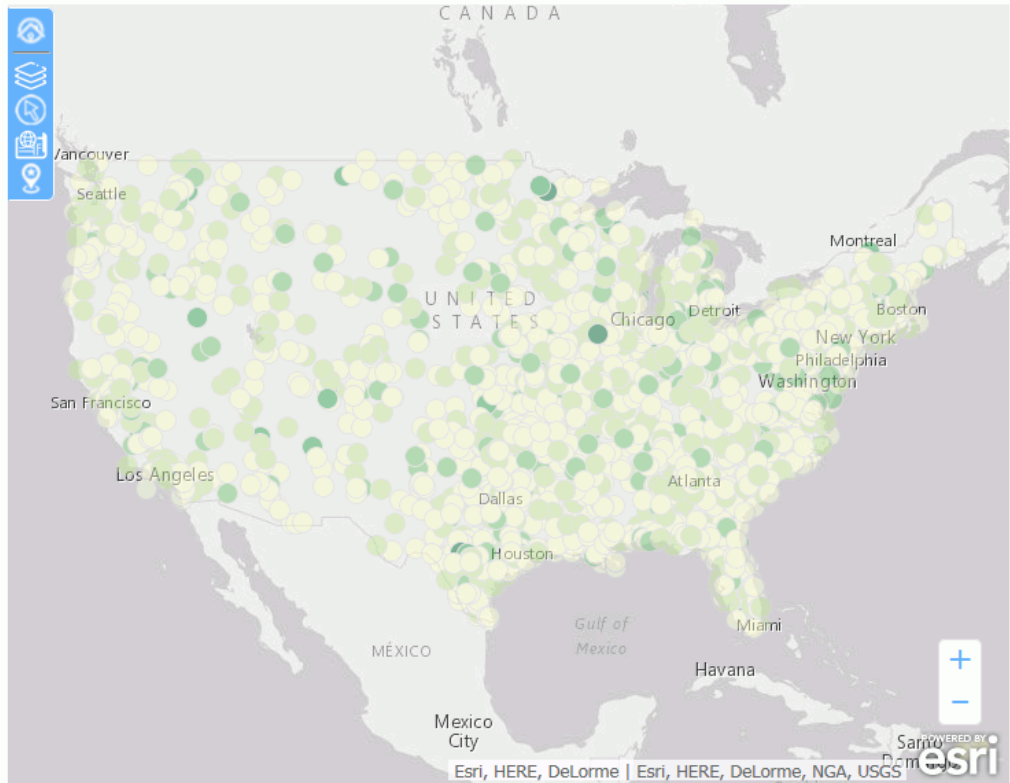
User limitations. User can only select one color array. The default array uses shades of off-white and green.

Example: Symbolizing Points Using Color

This example symbolizes the points using color. The external WebFOCUS request used to provide the point data is the customer_locations procedure created in [Configuring a Map Data Layer](#) on page 669. The geographic role is Point of Interest, and the fields that match the role are LATITUDE/LONGITUDE. This example uses the Natural Jenks color classification scheme based on the COGS_US field, as shown in the following image.



Run the HTML page. The output is shown in the following image.



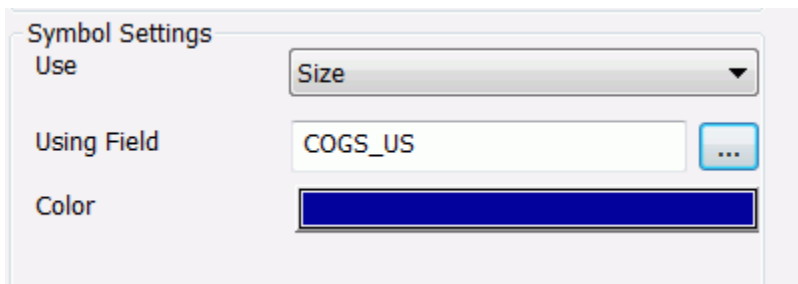
Configuring Point Symbology Using Size

When you choose **Size** in the Symbol Settings Use box in the ESRI Object Settings panel, each symbol is sized based on a numeric field in the request. You can also select a single color for the markers, as shown in the following image.

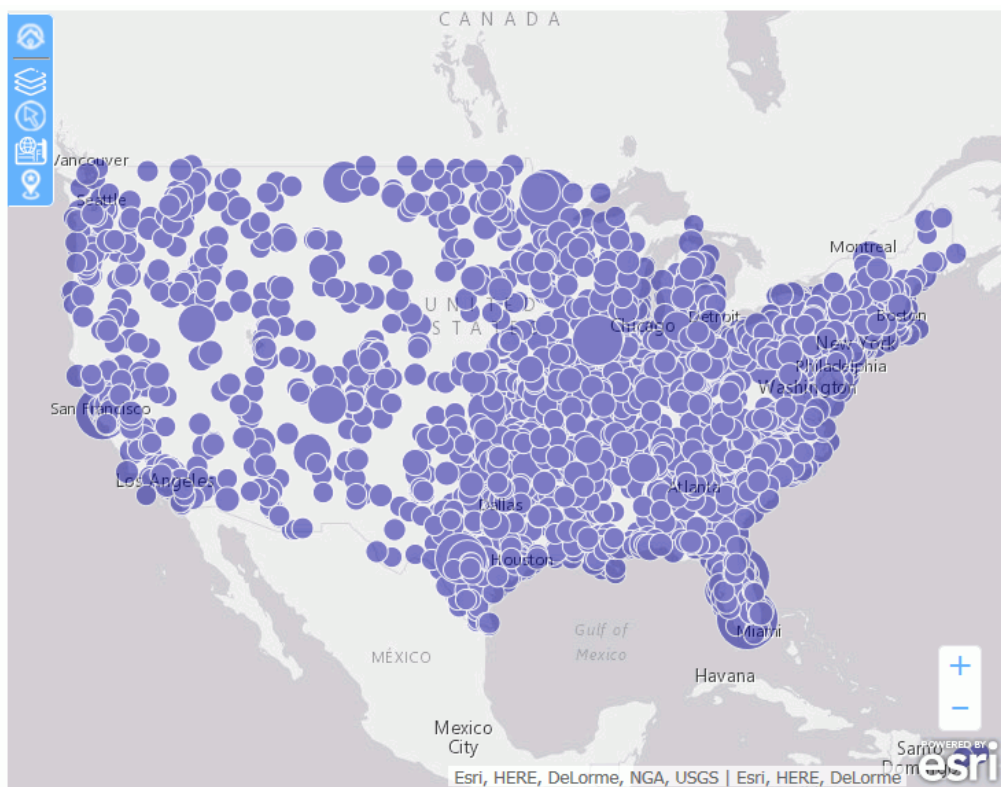
A screenshot of the 'Symbol Settings' panel in the ESRI Object Settings. The panel has a title 'Symbol Settings' and three main sections: 'Use', 'Using Field', and 'Color'. The 'Use' section has a dropdown menu currently set to 'Size'. The 'Using Field' section has a text input field that is empty, followed by a button with three dots. The 'Color' section has a color selection bar currently set to a solid red color.

Example: Symbolizing Points Using Size

This example uses the COGS_US field to size the markers and blue to color the markers, as shown in the following image.

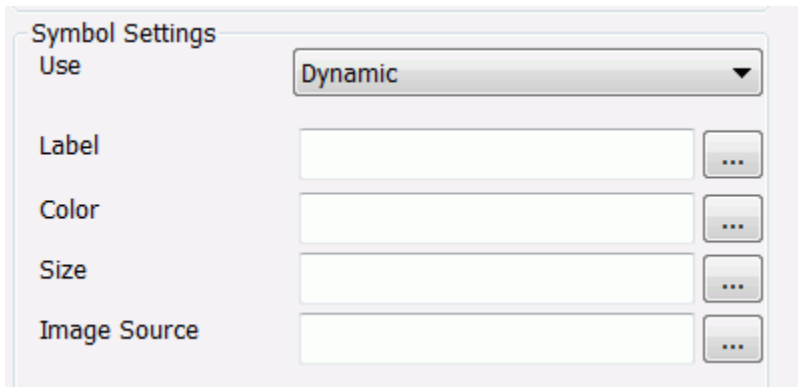


The WebFOCUS request that provides the values is `customer_locations.fex`, described in [Configuring a Map Data Layer](#) on page 669. Run the HTML page. The output is shown in the following image.



Configuring Dynamic Point Symbology

When the symbology for points is Dynamic, you can specify columns in the request that provide labels, colors, sizes, and image sources for the points, as shown in the following image.



The image shows a 'Symbol Settings' dialog box. At the top, there is a 'Use' dropdown menu currently set to 'Dynamic'. Below this, there are four rows of settings, each with a label on the left and an input field on the right. The labels are 'Label', 'Color', 'Size', and 'Image Source'. Each input field is empty and has a small button with three dots to its right, indicating a selection menu.

Descriptions of the fields available when you select *Dynamic* in the Symbol Settings Use drop-down list follow.

Label

Description. This column will be used to provide the text in the Legend.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one column in the layer request.

Color

Description. This column will provide a value for the color of a marker. Any valid color value is accepted for example, RGB, hex, or named. The default is red.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one column in the layer request. Not supported when the markers are configured as images.

Size

Description. This column will provide a value for the size of a marker. The default is 12.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one column in the layer request.

Image Source

Description. This column will provide a value for the image used as a marker. The value needs to be a qualified URL. If no image source is specified, the default marker is a circle.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one column in the layer request.

Once Image symbology is selected, color and size are disabled.

Example: Using Dynamic Symbols for Points

This example uses dynamic images, sizes, and labels for points.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

The following WebFOCUS procedure dynamically defines fields that supply the labels, sizes, and images for the map points. Paste this procedure into the text editor and save it as `customer_locations2.fex`.

```

DEFINE FILE WF_RETAIL_LITE
SIZE1/I4 = IF COUNTRY_NAME EQ 'United States' THEN 25
          ELSE IF COUNTRY_NAME EQ 'France' THEN 20
          ELSE IF COUNTRY_NAME EQ 'Japan' THEN 12
          ELSE IF COUNTRY_NAME EQ 'Italy' THEN 15
          ELSE 10;
LABEL1/A20 = IF COUNTRY_NAME EQ 'United States' THEN 'US'
             ELSE IF COUNTRY_NAME EQ 'France' THEN 'France'
             ELSE IF COUNTRY_NAME EQ 'Japan' THEN 'Japan'
             ELSE IF COUNTRY_NAME EQ 'Italy' THEN 'Italy'
             ELSE 'UK';
IMAGE1/A80 = IF COUNTRY_NAME EQ 'United States'
             THEN 'http://documentation.ibi.com/jschart/us.gif'
             ELSE IF COUNTRY_NAME EQ 'France'
             THEN 'http://documentation.ibi.com/jschart/france.gif'
             ELSE IF COUNTRY_NAME EQ 'Japan'
             THEN 'http://documentation.ibi.com/jschart/japan.gif'
             ELSE IF COUNTRY_NAME EQ 'Italy'
             THEN 'http://documentation.ibi.com/jschart/italy.gif'
             ELSE 'http://documentation.ibi.com/jschart/uk.gif';

END
TABLE FILE WF_RETAIL_LITE
SUM
    WF_RETAIL_LITE.WF_RETAIL_CUSTOMER.ID_CUSTOMER
    WF_RETAIL_LITE.WF_RETAIL_SALES.COGS_US
    QUANTITY_SOLD
    LABEL1 SIZE1 IMAGE1
    COMPUTE LONGITUDE/D12.2 = CUSTOMER_LONGITUDE;
    COMPUTE LATITUDE/D12.2 = CUSTOMER_LATITUDE;
BY COUNTRY_NAME
BY WF_RETAIL_LITE.WF_RETAIL_CUSTOMER.ID_CUSTOMER NOPRINT
WHERE COUNTRY_NAME EQ 'United States' OR 'France' OR 'Italy' OR 'Japan' OR
      'United Kingdom';
ON TABLE NOTOTAL
ON TABLE PCHOLD FORMAT XML
END

```

Add this request to the HTML page using the Requests & Data Sources panel. Then configure the ESRI Object Settings panel to use this request for the Customer layer. Configure the symbol settings as shown in the following image.

Symbol Settings

Use: Dynamic

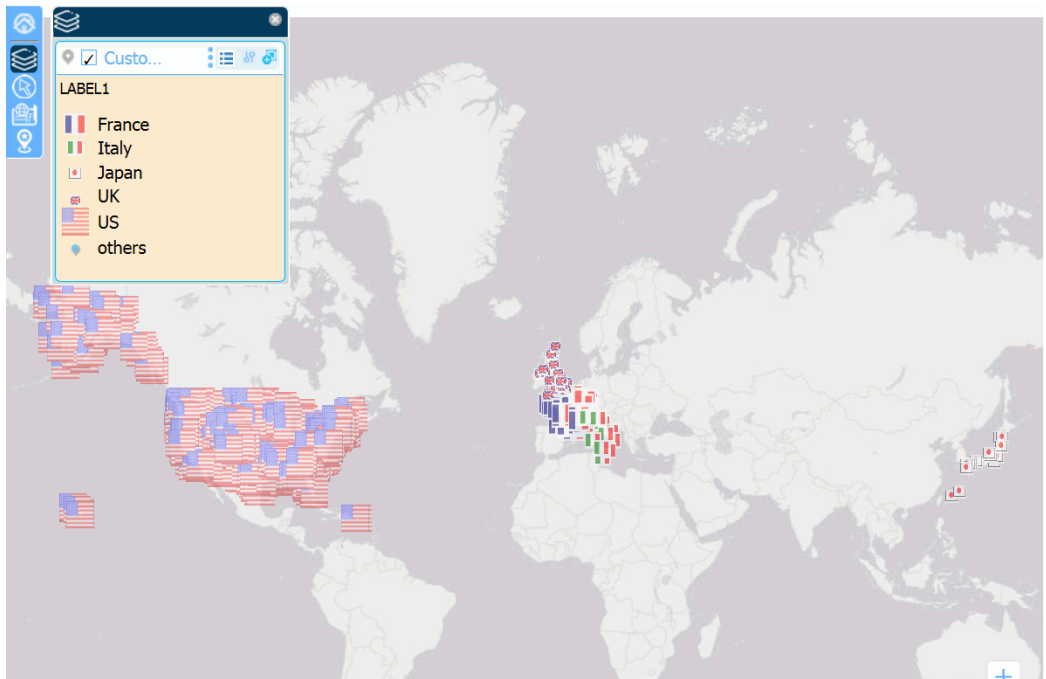
Label: LABEL1

Color:

Size: SIZE1

Image Source: IMAGE1

Turn on the default extent and run the HTML page. The output is shown in the following image. The Legend is toggled on to show the labels, sizes, and images used.



Configuring Unique Symbology for Points

When you configure Unique symbology, you can display a different shape or image for each value of a dimension field in the request.

The following image shows the Symbol Settings properties for Unique symbology in the ESRI Object Settings pane.

The screenshot shows a 'Symbol Settings' dialog box. It contains the following elements:

- Symbol Settings** (Title)
- Use**: A dropdown menu currently showing 'Unique'.
- Using Field**: A text input field that is empty, followed by a three-dot menu button.
- Size**: A text input field containing the value '12'.
- Shape / Image**: A dropdown menu currently showing 'Shape'.
- Two empty square preview boxes, one on the left and one on the right, separated by two small buttons with '>' and '<' symbols.
- Label**: A text input field.
- Color**: A color selection field (currently showing a white box).
- Shape**: A dropdown menu.

Descriptions of the fields for unique symbology for points follow.

Using Field

Description. Is a dimension field in the request whose values will determine the shape or image to use.

Type of field. Combo box.

Populated by. User.

User limitations. Must be a dimension field in the request.

Size

Description. Is the size of a marker in pixels. The default is 12.

Type of field. Text box.

Populated by. User.

User limitations. Must be a measure field in the request.

Shape / Image

Description. Indicates which type of marker to use, a standard shape or an image file.

Type of field. Drop-down list.

Populated by. User.

User limitations. All values must use the same type of marker.

Values

Description. This is the list of values for the Using Field. You can select any value and click the arrow keys to move them between the original list box and the user-selected values list box. Any values not in the user-selected list will display with default markers.

Type of field. List box.

Populated by. System.

User limitations. The user can select values from the system-generated list.

Label

Description. For each value selected, you can enter a label to display in the legend.

Type of field. Text box.

Populated by. User.

User limitations. User can enter a single label for each value of the Using Field.

Color

Description. For each value selected, you can select a marker color. The default is red. Note that color is disabled if the type of marker is image.

Type of field. Color picker.

Populated by. User.

User limitations. User can select a single color for each value of the Using Field.

Shape

Description. For each value selected, you can select a standard shape.

Type of field. Drop-down list.

Populated by. System defined.

User limitations. User can select a single shape for each value of the Using Field. Choices are:

- ☐ Circle. This is the default shape.
- ☐ Diamond.
- ☐ Cross.

☐ Square.

☐ X.

Image Source

Description. For each value selected, specify an image file. This file must have a valid image format.

Type of field. Text box with Browse to button.

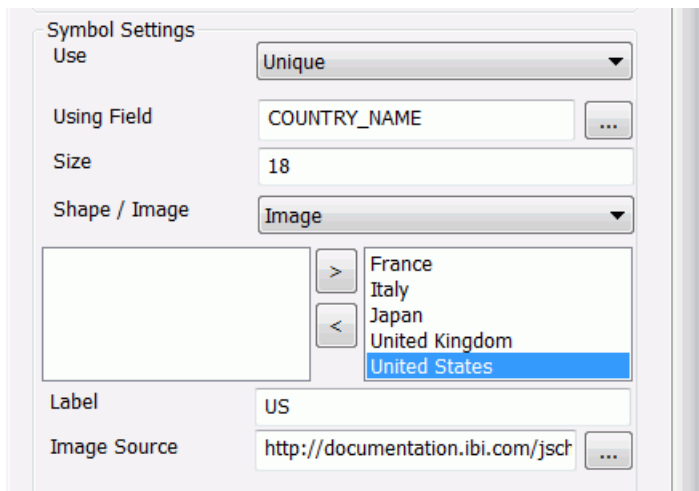
Populated by. User.

User limitations. User can specify a single image file for each value of the Using Field. It can be a path to a file accessible by the user PC or a URL reference. This file must have a valid image format.

Example: Configuring Unique Image Symbology for Points

This example configures a unique image for the markers for each country name.

Configure the map to use the customer_locations2 procedure and the Point of Interest geographic role in the ESRI Object Settings panel. Configure the unique symbology to use the COUNTRY_NAME field, as shown in the following image.



Move the values of the COUNTRY_NAME field to the right using the > arrow and configure them as follows.

For France, enter *France* in the Label box and enter the following in the Image Source box:

<http://documentation.ibi.com/jschart/france.gif>

For Italy, enter *Italy* in the Label box and enter the following in the Image Source box:

<http://documentation.ibi.com/jschart/italy.gif>

For Japan, enter *Japan* in the Label box and enter the following in the Image Source box:

<http://documentation.ibi.com/jschart/japan.gif>

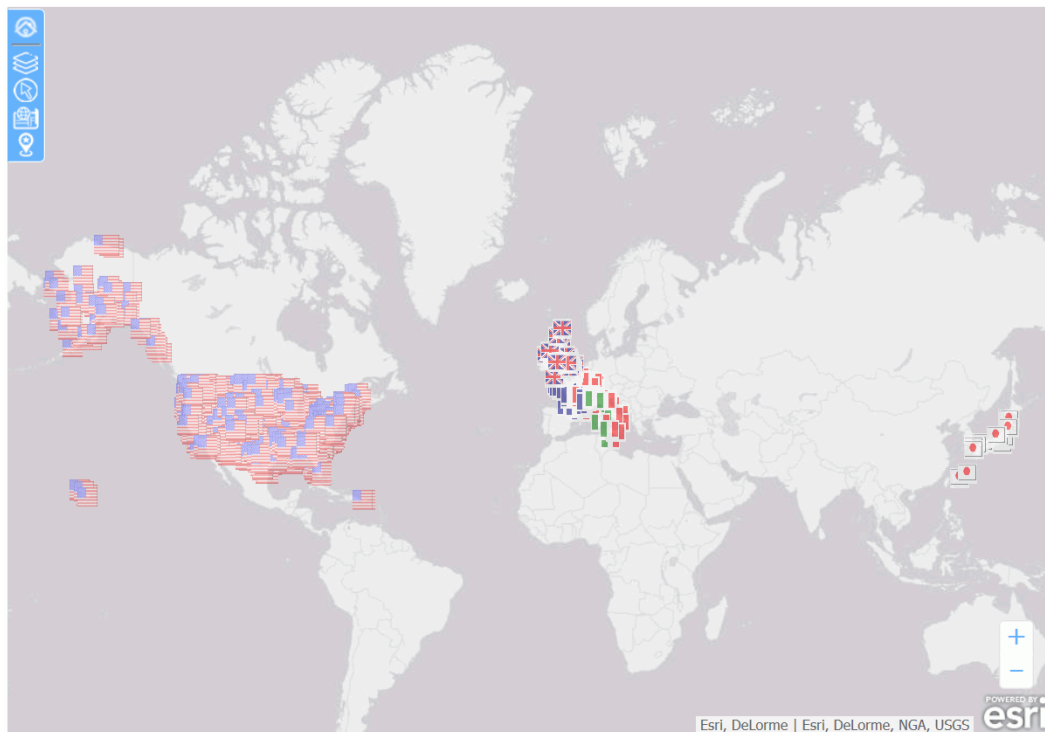
For the United Kingdom, enter *UK* in the Label box and enter the following in the Image Source box:

<http://documentation.ibi.com/jschart/uk.gif>

For the United States, enter *US* in the Label box and enter the following in the Image Source box:

<http://documentation.ibi.com/jschart/us.gif>

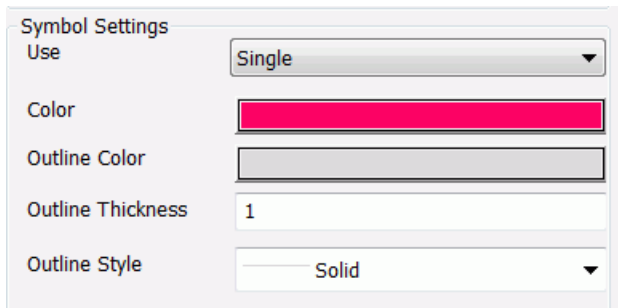
Turn on the default extent and run the HTML page. The output is shown in the following image.



Configuring Symbology for a Polygon Data Layer

When the geographic data defines polygons, the areas on the map representing each polygon can be colored based on several classification schemes and can have an outline that consists of a color, a thickness, and a line style.

The following image shows the Symbol Settings section of the ESRI Object Settings panel for a polygon-based layer. Some selections may open additional options not shown in this image.



The following table summarizes the types of symbology available for a polygon layer. Each type of symbology is illustrated in one of the sections that follows.

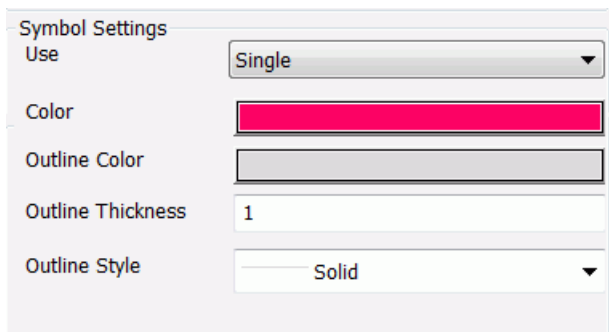
Type of Symbol	Description	Configuration Fields
Single	User selects a single color, outline color, outline thickness, and outline style for the polygons.	<p>Use. Selects the type of symbols, <i>Single</i> for this option.</p> <p>Color. User selects a polygon fill color. The default is red.</p> <p>Outline Color. User selects a color for the borders around the polygons. The default is gray.</p> <p>Outline Thickness. User specifies a thickness in pixels for the polygon borders. The default is 1.</p> <p>Outline Style. User selects one of the following polygon border styles:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Solid (default) <input type="checkbox"/> None <input type="checkbox"/> Dot <input type="checkbox"/> Dash <p>For more information, see Configuring Polygon Symbology Using a Single Color on page 715</p>

Type of Symbol	Description	Configuration Fields
Color	User specifies a field to be used to classify polygon colors.	<p>Use. Selects the type of symbols, <i>Color</i> for this option.</p> <p>Using Field. User selects a field in the request to be used to classify the polygons by color.</p> <p>By. User selects from the following classification methods.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Natural Jenks (the default). <input type="checkbox"/> Quantile. <input type="checkbox"/> Equal Breaks. <input type="checkbox"/> Standard Deviation. <input type="checkbox"/> Geometrical Breaks. <p>Number of Classes. User specifies the number of color breaks. The default is 5.</p> <p>Color Scheme. User selects the color palette for the polygons. The default uses shades of green.</p> <p>For more information, see Configuring Polygon Symbolology Using a Single Color on page 715</p>
Dynamic	The WebFOCUS request that provides the location dimension defines the polygon properties.	<p>Use. Selects the type of symbols, <i>Dynamic</i> for this option.</p> <p>Label. User specifies a field in the request that contains the label text to display in the legend. The default is the AS name, title, or field name.</p> <p>Color. User specifies a field in the request that defines the fill colors of the polygons.</p> <p>For more information, see Configuring Dynamic Polygon Symbolology on page 727</p>

Type of Symbol	Description	Configuration Fields
Unique	User selects polygon properties for each value of a dimension in the request.	<p>Use. Selects the type of symbols, <i>Unique</i> for this option.</p> <p>Using Field. User selects a dimension in the request and assigns polygon properties for each value.</p> <p>Dimension Values box. A box is populated with the dimension values. The user can select values and move them to the right, then assign polygon properties to those selected values.</p> <p>Label. User specifies text to display in the legend for each selected dimension value.</p> <p>Color. User selects a polygon fill color for each selected dimension value. The default value is red.</p> <p>Outline Color. User selects a polygon border color for each selected dimension value. The default value is gray.</p> <p>Outline Thickness. User specifies a polygon border thickness in pixels for each selected dimension value. The default value is 1.</p> <p>Outline Style. User selects a polygon border style (Solid, None, Dot, Dash) for each selected dimension value. The default value is Solid.</p> <p>For more information, see Configuring Unique Symbolology for Polygons on page 718</p>

Configuring Polygon Symbolology Using a Single Color

The default symbolology for a polygon data layer is to color the polygons red with a light gray, 1-pixel solid outline, as shown in the following image.

A screenshot of the 'Symbol Settings' dialog box. It has a title bar 'Symbol Settings' and a close button. The settings are as follows: 'Use' is a dropdown menu set to 'Single'; 'Color' is a color picker showing a bright pink color; 'Outline Color' is a color picker showing a light gray color; 'Outline Thickness' is a text input field containing the number '1'; and 'Outline Style' is a dropdown menu set to 'Solid'.

You can change the color for the polygon, the color for the outline, the thickness of the outline and the line style for the outline.

The following fields are available when you use Single as the symbology setting.

Color

Description. Opens a color picker dialog box that lets you select a color for the polygons. You can select from a palette, select a named string, select a system color, or create a custom color, and set this color instance to that value.

Type of field. Color value.

Populated by. User.

User limitations. User can browse to a single color. The default is red.

Outline Color

Description. Opens a color picker dialog box that lets you select a color for to outline the polygons. You can select from a palette, select a named string, select a system color, or create a custom color, and set this color instance to that value.

Type of field. Color value.

Populated by. User.

User limitations. User can browse to a single color. The default is light gray.

Outline Thickness

Description. Is a thickness for the outline in pixels.

Type of field. Integer.

Populated by. User.

User limitations. User can enter a single number. The default is 1.

Outline Style

Description. Is the style of the polygon outline.

Type of field. Drop-down list.

Populated by. User

User limitations. Choices are:

- ☐ Solid (this is the default value).
- ☐ None.
- ☐ Dot.
- ☐ Dash.

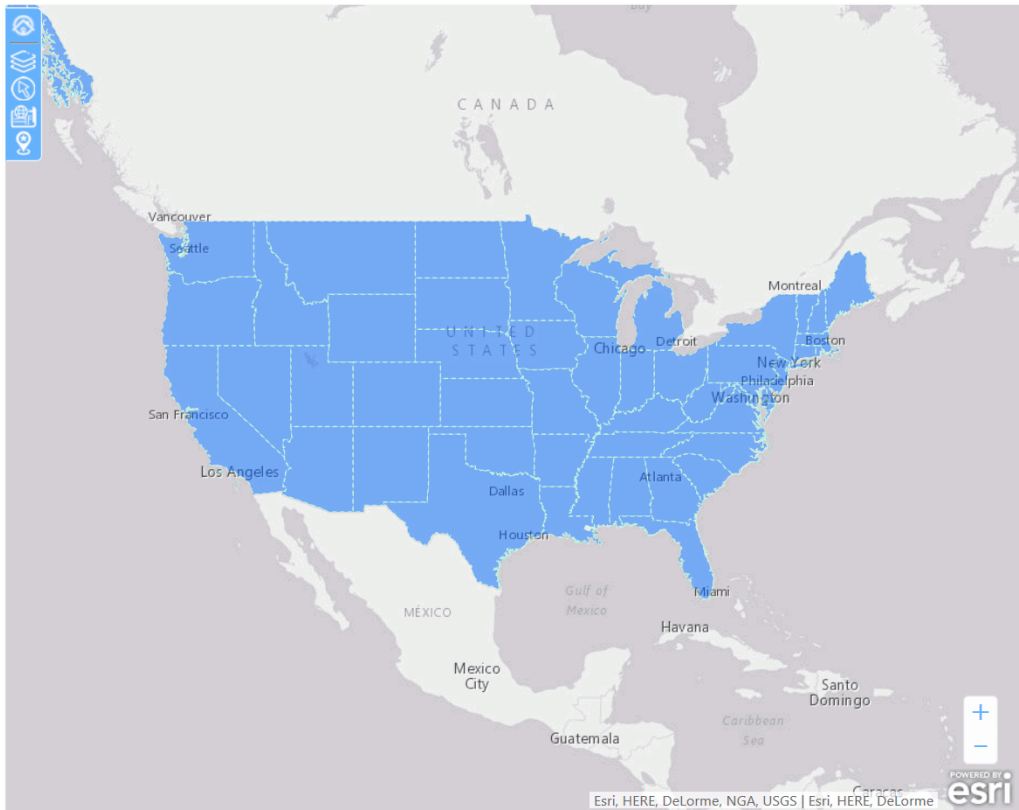
Example: Using Single Symbology for Polygons

This example makes the polygons blue and the outline a dashed light blue line. The WebFOCUS request used is `customer_states`, as described in [Configuring a Map Data Layer](#) on page 669. Add this request to the HTML page in the Requests & Data Sources panel.

Configure the map layer to use the `customer_states` procedure described in [Configuring a Map Data Layer](#) on page 669. The geographic role is US state (Name), and the field that matches the role is `STATE_PROV_NAME`. Configure the Symbol Settings in the ESRI Object Settings panel as shown in the following image, by clicking the *Color* field and selecting a dark blue color, clicking the *Outline Color* field and selecting a light blue color, and selecting *Dash* from the *Outline Style* drop-down list.



Run the HTML page. The output is shown in the following image.



Configuring Unique Symbolology for Polygons

When you configure Unique symbology, you can display a different color for each value of a dimension field in the request. This is a good technique for defining categories.

The following image shows the Symbol Settings properties for Unique symbology in the ESRI Object Settings pane.

Symbol Settings

Use: Unique

Using Field: [Empty text box] ...

[Empty box] [Empty box]

[>] [
<]

Label: [Empty text box]

Color: [Empty text box]

Outline Color: [Empty text box]

Outline Thickness: [Empty text box]

Outline Style: [Empty dropdown menu]

Descriptions of the fields for unique symbology for polygons follow.

Using Field

Description. Is a dimension field in the request whose values will determine the shape or image to use.

Type of field. Combo box.

Populated by. User.

User limitations. Must be a dimension field in the request.

Values

Description. This is the list of values for the Using Field. You can select any value and click the arrow keys to move them between the original list box and the user-selected values list box. Any values not in the user-selected list will display with default colors.

Type of field. List box.

Populated by. System.

User limitations. The user can select values from the system-generated list.

Label

Description. For each value selected, you can enter a label to display in the legend.

Type of field. Text box.

Populated by. User.

User limitations. User can enter a single label for each value of the sing Field.

Color

Description. For each value selected, you can select a polygon color. The default is red.

Type of field. Color picker.

Populated by. User.

User limitations. User can select a single color for each value of the Using Field.

Outline Color

Description. For each value selected, you can select a color for the polygon outline. The default is light gray.

Type of field. Color picker.

Populated by. User.

User limitations. User can select a single color for each value of the Using Field.

Outline Thickness

Description. Is a thickness for the outline in pixels.

Type of field. Integer.

Populated by. User.

User limitations. User can enter a single number. The default is 1.

Outline Style

Description. Is the style of the polygon outline.

Type of field. Drop-down list.

Populated by. User

User limitations. Choices are:

- ☐ Solid (this is the default value).
- ☐ None.

- ☐ Dot.
- ☐ Dash.

Example: Configuring Unique Color Symbology for Polygons

This example configures a unique color for the polygons for each US region.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

Following is the syntax for a WebFOCUS request that defines regions based on state names. Paste this request into the text editor and save it as customer_states4.

```
DEFINE FILE WF_RETAIL_LITE
STATE/A20 = WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME;
REGION/A10 = IF STATE EQ 'Connecticut' OR 'Maine' OR 'Massachusetts' OR
'New Hampshire' OR 'Rhode Island' OR 'Vermont' OR
'New Jersey' OR 'New York' OR 'Pennsylvania' THEN 'Northeast'
ELSE IF STATE EQ 'Illinois' OR 'Indiana' OR 'Michigan' OR 'Ohio'
OR 'Wisconsin' OR 'Iowa' OR 'Kansas' OR 'Minnesota' OR 'Missouri'
OR 'Nebraska' OR 'North Dakota' OR 'South Dakota' THEN 'Midwest'
ELSE IF STATE EQ 'Delaware' OR 'Florida' OR 'Georgia' OR 'Maryland'
OR 'North Carolina' OR 'South Carolina' OR 'Virginia' OR
'Washington D.C.' OR 'West Virginia' OR 'Alabama' OR 'Kentucky' OR
'Mississippi' OR 'Tennessee' OR 'Arkansas' OR 'Louisiana' OR
'Oklahoma' OR 'Texas' THEN 'South' ELSE 'West';

END
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY REGION
BY WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE PCHOLD FORMAT XML
END
```

Configure the map layer to use this request in the ESRI Object Settings panel. The geographic role is US state (Name), and the field that matches the role is STATE_PROV_NAME. Configure the unique symbol settings using the REGION field, as shown in the following image.

The screenshot displays the 'Symbol Settings' panel for an ESRI map layer. The 'Use' dropdown is set to 'Unique'. The 'Using Field' dropdown is set to 'REGION'. A list of regions is shown: Midwest, Northeast, South, and West. The 'Label' field is empty. The 'Color' field is set to orange. The 'Outline Color' field is set to gray. The 'Outline Thickness' is set to 1. The 'Outline Style' is set to Solid.

Property	Value
Use	Unique
Using Field	REGION
Regions	Midwest, Northeast, South, West
Label	
Color	Orange
Outline Color	Gray
Outline Thickness	1
Outline Style	Solid

Move each region value to the right using the > arrow, and configure the following entries and selections for each:

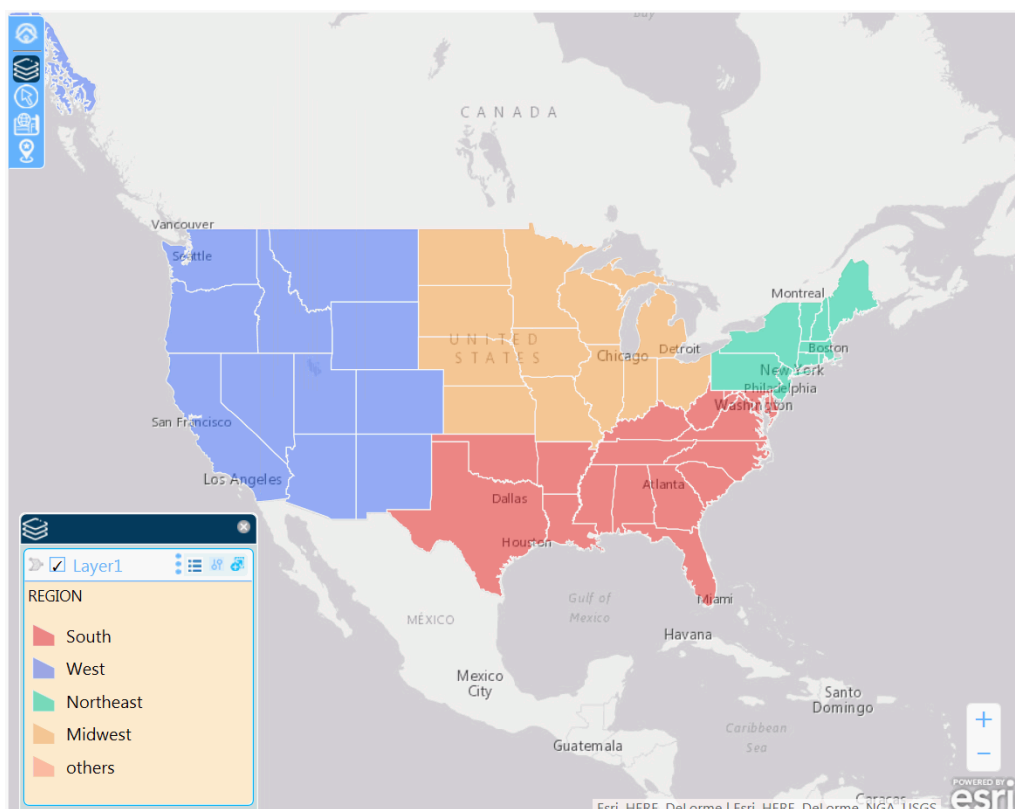
For Northeast, enter *Northeast* in the Label box and select a green polygon color from the color picker.

For West, enter *West* in the Label box and select a blue polygon color from the color picker.

For South, enter *South* in the Label box and leave the polygon color as red.

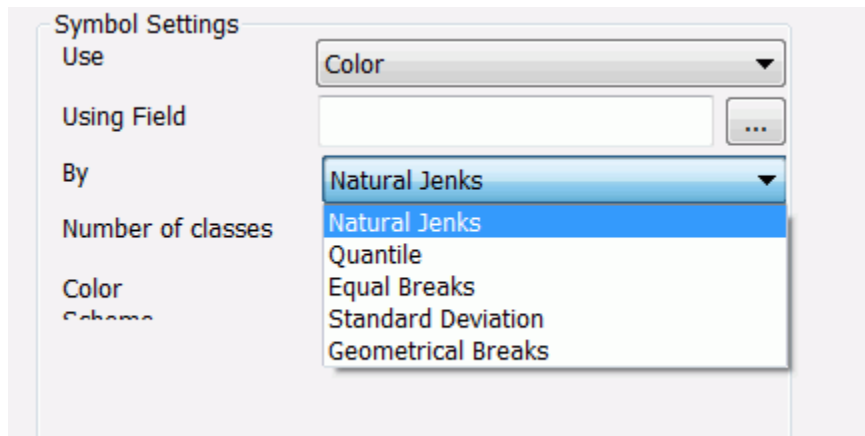
For Midwest, enter *Midwest* in the Label box and select an orange polygon color from the color picker.

Run the HTML page. The output is shown in the following image. The table of contents is open to show the labels and colors.



Configuring Polygon Symbology Using Color

When you select *Color* in the Symbol Settings Use drop-down list of the ESRI Object Settings panel, the polygons are colored using a choice of color classification systems, as shown in the following image.



Using Field

Description. This is a numeric field in the request whose values will be used by the classification schema to define the class breaks.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one field. It should be a measure field or numeric.

Number of Classes

Description. This is the number of class breaks that will be rendered.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select values 2 through 9. The default is 5.

By

Description. This is the classification scheme to be used for assigning the breaks and ranges.

Type of field. Drop-down list.

Populated by. User.

User limitations. Choices are:

- ☐ **Natural Jenks**, a classification scheme that uses breaks inherent in the data, grouping similar values and maximizing differences between groups. This is the default choice.
- ☐ **Quantile**, a classification scheme in which each class contains an equal number of points.
- ☐ **Equal Breaks**, a classification scheme that breaks the data into equal ranges of values.
- ☐ **Standard Deviation**, a classification scheme that defines the breaks based on the number of standard deviations from the mean.
- ☐ **Geometrical Breaks**, a classification scheme that bases class breaks on intervals that have a geometrical series.

Color Scheme

Description. This lets you select an array of color values, defining the color ramp. The first color will be used to render the minimum data class, and the last color will be used to render the maximum data class.

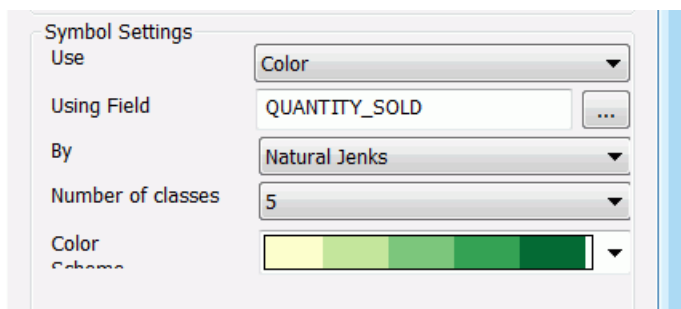
Type of field. Drop-down list.

Populated by. User.

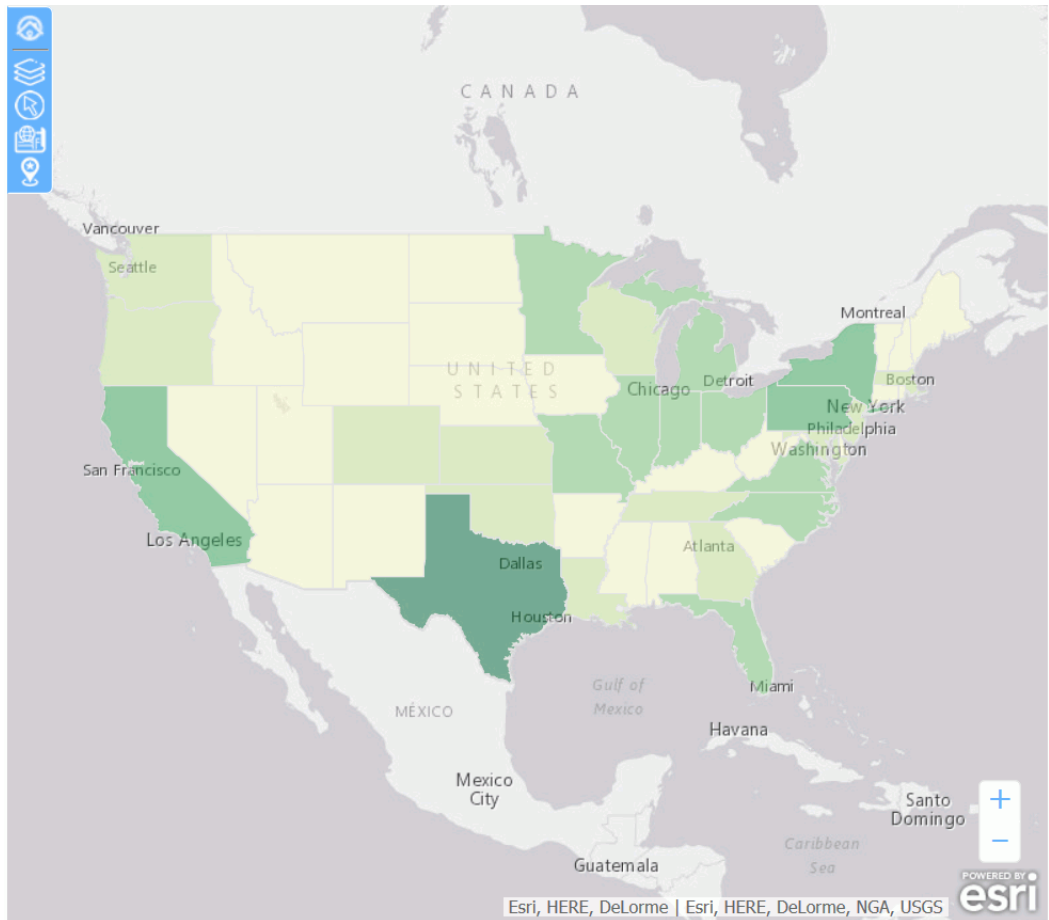
User limitations. User can only select one color array. The default array uses shades of off white and green.

Example: Symbolizing Polygons Using Color

This example uses the Natural Jenks color classification scheme based on the QUANTITY_SOLD field, as shown in the following image. The WebFOCUS request that provides the point data is the customer_states4 procedure. The geographic role is US state (Name), and the field that matches this role is STATE_PROV_NAME.

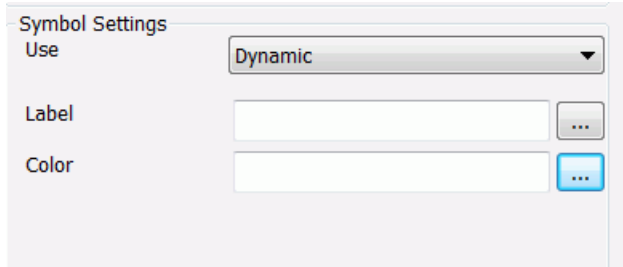


Run the HTML page. The output is shown in the following image.



Configuring Dynamic Polygon Symbology

When the symbology for polygons is Dynamic, you can specify columns in the request that provide labels and colors for the polygons, as shown in the following image.



Descriptions of the fields available when you select Dynamic in the Symbol Settings Use drop-down list follow.

Label

Description. This column will be used to depict values in the Legend.

Type of field. Combo box.

Populated by. User.

User limitations. User must select one column in the layer request.

Color

Description. This column will provide a value for the color of a polygon. The default is red.

Type of field. Combo box.

Populated by. User.

User limitations. User can only select one column in the layer request.

Example: Using Dynamic Symbols for Polygons

This example uses dynamic colors and labels for polygon.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

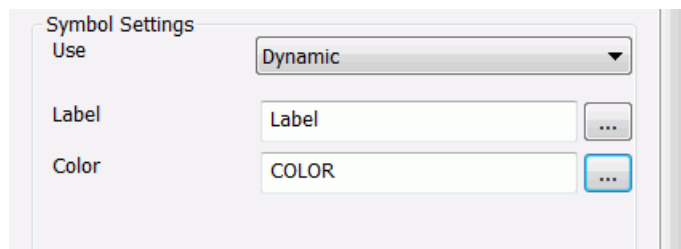
The following WebFOCUS procedure defines fields that supply the color and label for each country. Paste this procedure into the text editor and save it as customer_countries.fex.

```

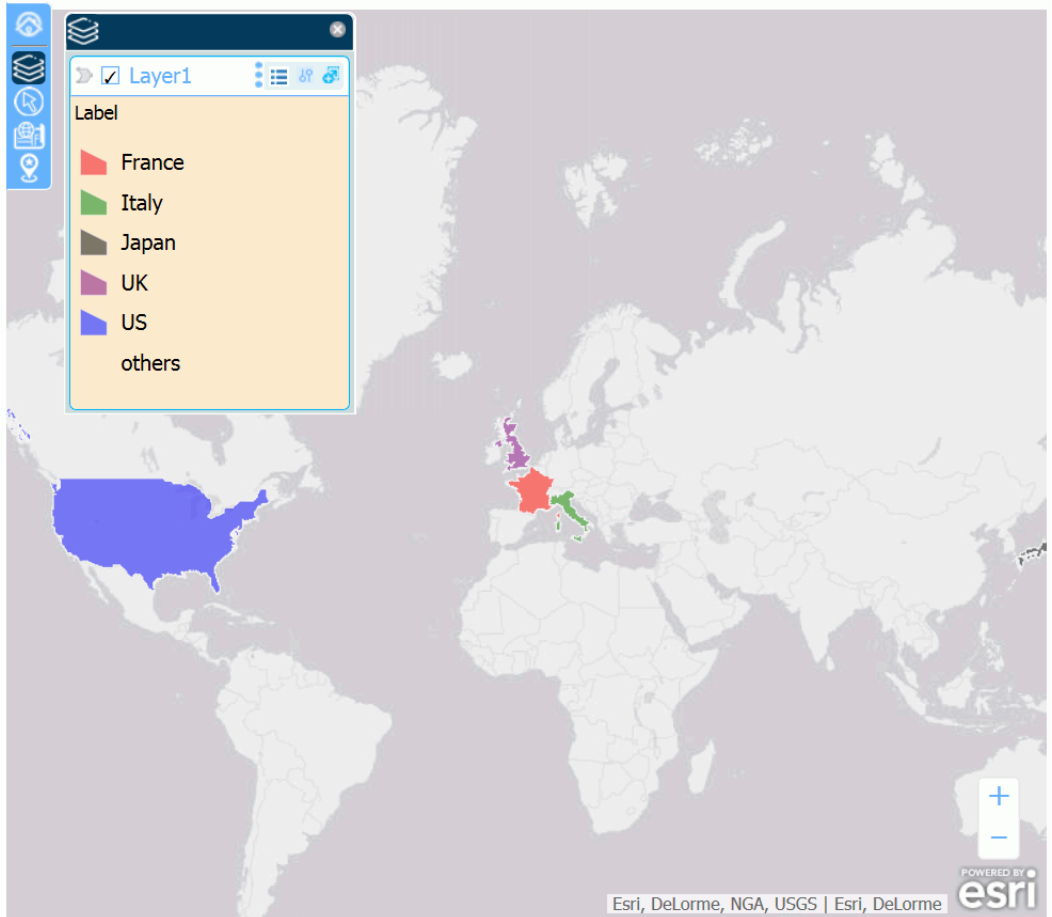
DEFINE FILE WF_RETAIL_LITE
COLOR/A10 = IF COUNTRY_NAME EQ 'United States' THEN 'blue'
            ELSE IF COUNTRY_NAME EQ 'France' THEN 'red'
            ELSE IF COUNTRY_NAME EQ 'Italy' THEN 'green'
            ELSE IF COUNTRY_NAME EQ 'Japan' THEN 'black'
            ELSE 'purple';
Label/A20 = IF COUNTRY_NAME EQ 'United States' THEN 'US'
            ELSE IF COUNTRY_NAME EQ 'France' THEN 'France'
            ELSE IF COUNTRY_NAME EQ 'Japan' THEN 'Japan'
            ELSE IF COUNTRY_NAME EQ 'Italy' THEN 'Italy'
            ELSE 'UK';
END
TABLE FILE WF_RETAIL_LITE
SUM
    COGS_US
    QUANTITY_SOLD
    Label
    COLOR
BY COUNTRY_NAME
WHERE COUNTRY_NAME EQ 'United States' OR 'France' OR 'Italy' OR 'Japan'
    OR 'United Kingdom';
ON TABLE NOTOTAL
ON TABLE PCHOLD FORMAT XML
END

```

Add this request to the Customer Layer using the Requests & Data Sources panel. Then configure the map layer to use this request. The geographic role is Country (Name), and the field that matches this role is COUNTRY_NAME. Configure the Symbol Settings section of the ESRI Object Settings panel as shown in the following image. The Label is taken from the Label field in the request, and the Color is taken from the COLOR field in the request.



Run the HTML page. The output is shown in the following image. The Legend is toggled on to show the labels, sizes, and colors used.



Summary of Symbology and Visualizations by Layer Type

The following table lists the visualizations available by layer type.

Feature Type	Geographic Roles	Available Symbology	Available Visualizations
Point	Latitude/Longitude City US City	Shape/Image, Color, Size	Clustering, Heatmap, Popups, Default Visibility, Transparency
Polygon	State US State County Country Continent Three-digit Zip Code Five-digit Zip Code	Color	Popups, Default Visibility, Transparency

Note: The symbology and visualizations available for custom geographic roles depend on whether they define points or polygons.

Configuring Maps to Interact With Other Components

Variables in requests and maps can be used as parameters that are passed from one component to other components on an HTML page. When selections are made on one component, other components on the HTML page can be automatically updated to show those same selected values.

A point layer on a map has a unique ID field that App Studio automatically turns into a parameter. When you use that same parameter in a filter in a report or chart component, any selection on the map layer will change the output of the report or chart.

For a polygon layer, you must create the variables to be passed between the map and other components.

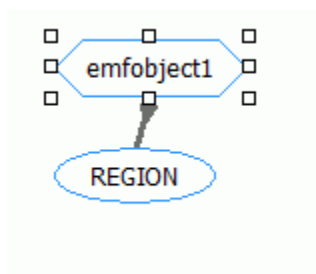
A WebFOCUS report or chart request can have drill-down links that select and zoom to points or polygons on a map layer.

Procedure: How to Update a Request Based on Map Selections

In order to cause map selections to update a report or chart, you need a parameter in the request that supplies the location dimension for the map, and a matching parameter in the request that will be updated when a selection is made on the map.

For a point layer using the map unique ID field, the report or chart must have a parameter matching the unique ID parameter automatically generated for the map. For a polygon layer, you can define a parameter in the request that supplies the location dimension for the map.

Once you have the parameter in the request to be updated and the parameter in the map defined, you must bind it to the map object on the Parameters tab by dragging the mouse from the map object to the request parameter, as shown in the following image.



The example used in this section to provide the point data is the customer_locations procedure created in [Configuring a Map Data Layer](#) on page 669. The unique ID field is ID_CUSTOMER.

The following version of the request populates a report and contains a parameter named &ID_CUSTOMER. Paste the syntax into the Text Editor and save it as customer_locations2b.fex.

```
-DEFAULT ID_CUSTOMER=FOC_NONE
TABLE FILE ASWFRetail/WF_RETAIL_LITE
SUM
    ID_CUSTOMER
    COGS_US
    REVENUE_US
    QUANTITY_SOLD
BY COUNTRY_NAME
BY STATE_PROV_NAME
BY ID_CUSTOMER NOPRINT
WHERE ID_CUSTOMER EQ &ID_CUSTOMER
ON TABLE NOTOTAL
ON TABLE SET PAGE NOLEAD
ON TABLE SET STYLE *
INCLUDE=ENWARM,$
ENDSTYLE
END
```

Note that the WHERE condition selects ID_CUSTOMER values that are equal to the &ID_CUSTOMER parameter values. When selections are made on the map, the map component will automatically pass the ID_CUSTOMER values selected to the report component, and the report will update to display those selections only. The -DEFAULT command causes the WHERE test to be ignored when no selection has been made.

The following steps set up the report and the task for updating it.

1. Add an Esri component to the HTML page.
2. Add the customer_locations.fex and customer_locations2b.fex external WebFOCUS requests to the HTML page using the Requests & Data Sources panel.
3. Configure the Esri component to use the Point of Interest geographic role and the customer_locations procedure, as described in [Configuring a Map Data Layer](#) on page 669.
4. Add a Frame component next to the map component on the HTML page.
5. With the map component selected, create a new task in the Tasks & Animations panel.

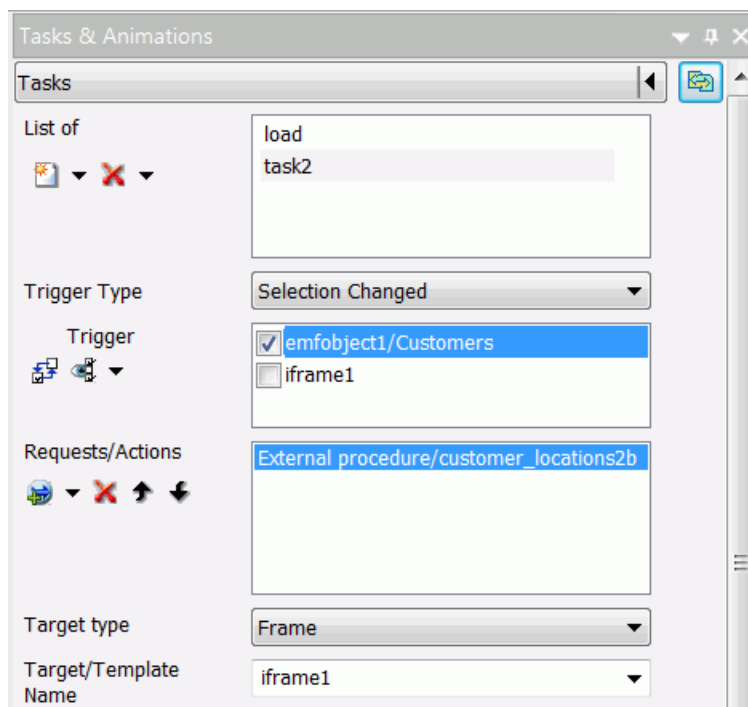
Set the following properties for the task.

- ☐ Set the Trigger Type to *Selection Changed*.
- ☐ For the Trigger, check the map layer whose selections should trigger the task.
- ☐ For Requests/Actions, select *Run Request* and then *customer_locations2b*.

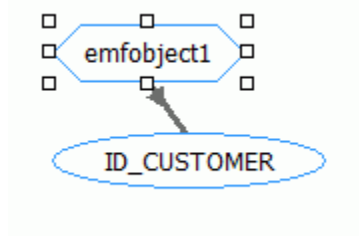
Note: The Load task should also run this request so that it is populated as soon as the HTML page is run.

- ❑ For Target Type, select *Frame*.
- ❑ For Target/Template Name, select the name of the frame where customer_locations2b will be run.

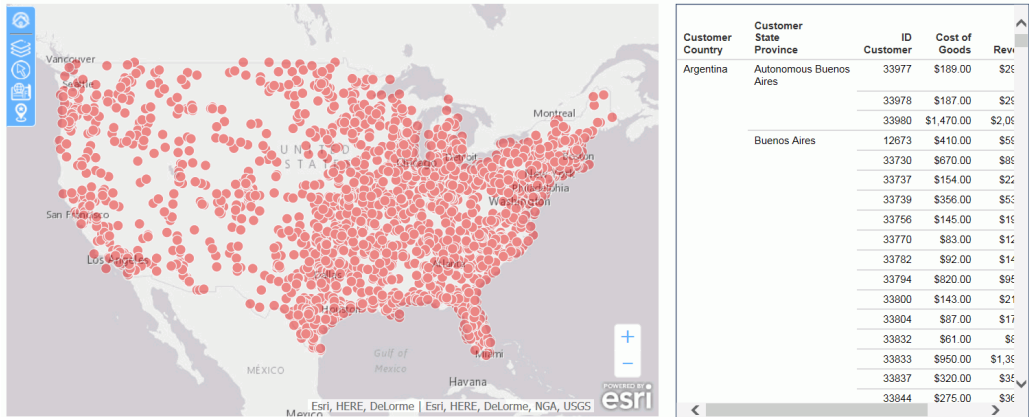
The Tasks & Animations Panel should look similar to the following:



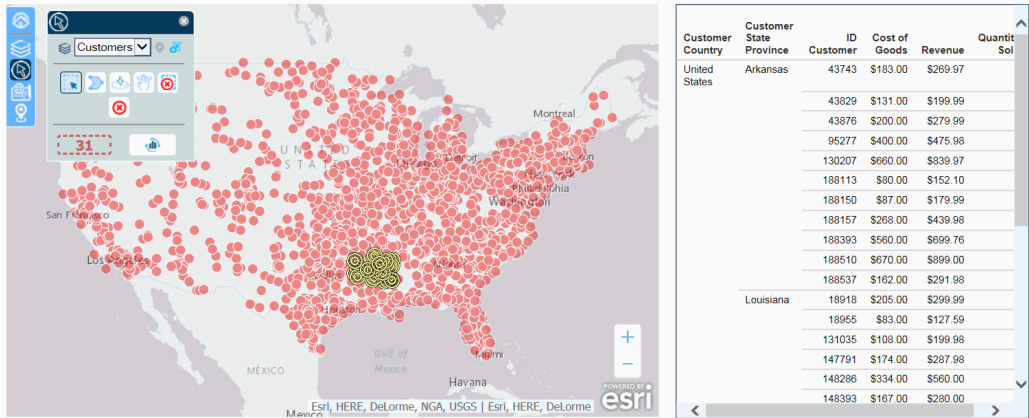
6. Bind the parameter to the map object on the Parameters tab by dragging the mouse from the map object to the request parameter, as shown in the following image.



Run the HTML page. The output will be similar to the following:



Make a selection on the map using the selection widget. The report updates to show the selected points on the map, as shown in the following image.



Procedure: How to Update a Request Based on Map Selections for a Polygon Layer

In order to cause map selections to update a report or chart, the report or chart must have a parameter matching a parameter on the map.

The request used in this example to provide the polygon data is the customer_states3 procedure. It is similar to the customer_states procedure created in [Configuring a Map Data Layer](#) on page 669, but it has a variable added to select regions.

The customer_states3 procedure follows:

```
-DEFAULT REGION = FOC_NONE
DEFINE FILE WF_RETAIL_LITE
STATE/A20 = WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME;
REGION/A10 = IF STATE EQ 'Connecticut' OR 'Maine' OR 'Massachusetts' OR
'New Hampshire' OR 'Rhode Island' OR 'Vermont' OR
'New Jersey' OR 'New York' OR 'Pennsylvania' THEN 'Northeast'
ELSE IF STATE EQ 'Illinois' OR 'Indiana' OR 'Michigan' OR 'Ohio'
OR 'Wisconsin' OR 'Iowa' OR 'Kansas' OR 'Minnesota' OR 'Missouri'
OR 'Nebraska' OR 'North Dakota' OR 'South Dakota' THEN 'Midwest'
ELSE IF STATE EQ 'Delaware' OR 'Florida' OR 'Georgia' OR 'Maryland'
OR 'North Carolina' OR 'South Carolina' OR 'Virginia' OR
'Washington D.C.' OR 'West Virginia' OR 'Alabama' OR 'Kentucky' OR
'Mississippi' OR 'Tennessee' OR 'Arkansas' OR 'Louisiana' OR
'Oklahoma' OR 'Texas' THEN 'South' ELSE 'West';
END
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY REGION
BY STATE_PROV_NAME
WHERE REGION EQ &REGION
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE PCHOLD FORMAT XML
END
```

The DEFINE FILE command defines which states are in which regions. The WHERE phrase for REGION sets the values of the REGION field to the values of the ®ION parameter. When a selection has been made on the map, the parameter values will be passed to a report request. The -DEFAULT command causes the WHERE test to be ignored when no selection has been made.

Paste this syntax into the Text Editor, and save it as customer_states3.fex.

The following version of the request, named customer_states3b, populates a report and also contains a parameter named ®ION. Paste the syntax into the Text Editor and save it as customer_states3b.fex.

```
-DEFAULT &REGION = FOC_NONE
DEFINE FILE WF_RETAIL_LITE
STATE/A20 = WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME;
REGION/A10 = IF STATE EQ 'Connecticut' OR 'Maine' OR 'Massachusetts' OR
'New Hampshire' OR 'Rhode Island' OR 'Vermont' OR
'New Jersey' OR 'New York' OR 'Pennsylvania' THEN 'Northeast'
ELSE IF STATE EQ 'Illinois' OR 'Indiana' OR 'Michigan' OR 'Ohio'
OR 'Wisconsin' OR 'Iowa' OR 'Kansas' OR 'Minnesota' OR 'Missouri'
OR 'Nebraska' OR 'North Dakota' OR 'South Dakota' THEN 'Midwest'
ELSE IF STATE EQ 'Delaware' OR 'Florida' OR 'Georgia' OR 'Maryland'
OR 'North Carolina' OR 'South Carolina' OR 'Virginia' OR
'Washington D.C.' OR 'West Virginia' OR 'Alabama' OR 'Kentucky' OR
'Mississippi' OR 'Tennessee' OR 'Arkansas' OR 'Louisiana' OR
'Oklahoma' OR 'Texas' THEN 'South' ELSE 'West';
END
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY REGION AS Region
BY WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME
WHERE REGION EQ &REGION
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE SET PAGE NOLEAD
ON TABLE SET STYLE *
INCLUDE=ENWARM,$
ENDSTYLE
END
```

Note that the WHERE condition selects REGION values that are equal to the ®ION parameter values. When selections are made on the map, the map component will pass the REGION values selected to the report component, and the report will update to display those selections only.

The following steps set up the report and the task for updating it.

1. Add an Esri component to the HTML page.
2. Add the customer_states3.fex and customer_states3b.fex external WebFOCUS requests to the HTML page using the Requests & Data Sources panel.
3. Configure the Esri component to use the US state (Name) geographic role and the customer_states3 procedure. The field that matches the geographic role is STATE_PROV_NAME.

For clarity, the map component has been configured with unique symbology using the REGION field, as described in [Configuring Unique Symbology for Polygons](#) on page 718.

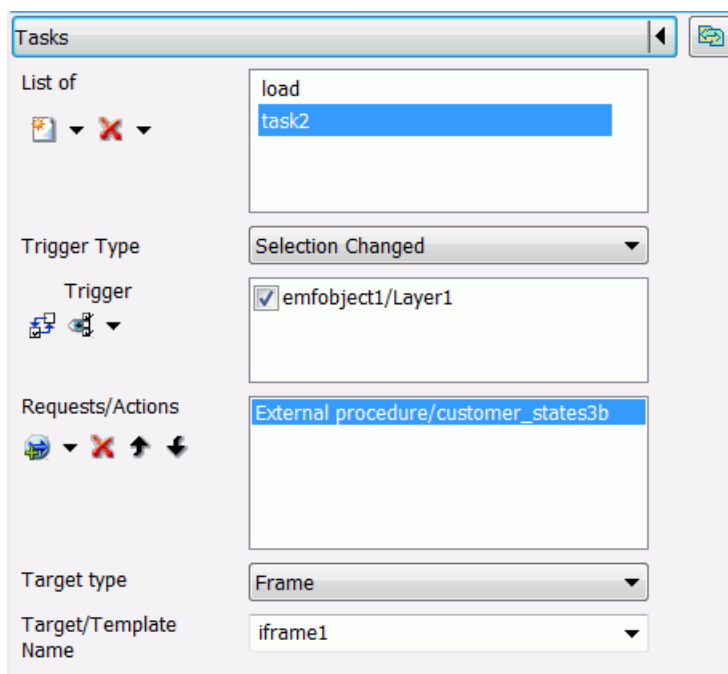
4. Add a Frame component next to the map component on the HTML page.
5. With the map component selected, create a new task in the Tasks & Animations panel.
Set the following properties for the task.

- ☐ Set the Trigger Type to *Selection Changed*.
- ☐ For the Trigger, check the map layer whose selections should trigger the task.
- ☐ For Requests/Actions, select *Run Request* and then *customer_states3b*.

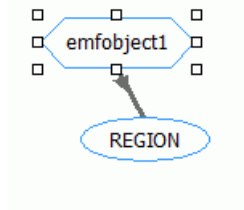
Note: The Load task should also run this request so that it is populated as soon as the HTML page is run.

- ☐ For Target Type, select *Frame*.
- ☐ For Target/Template Name, select the name of the frame where customer_states3b will be run.

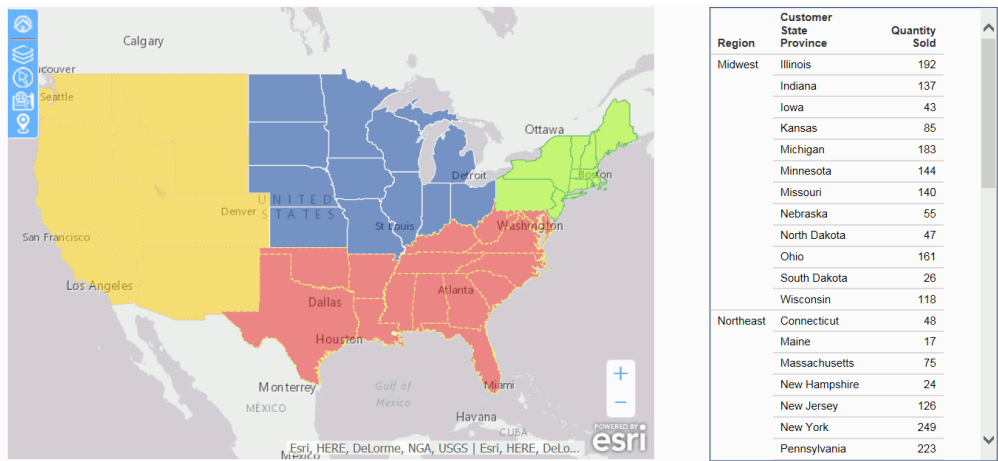
The Tasks & Animations Panel should look similar to the following:



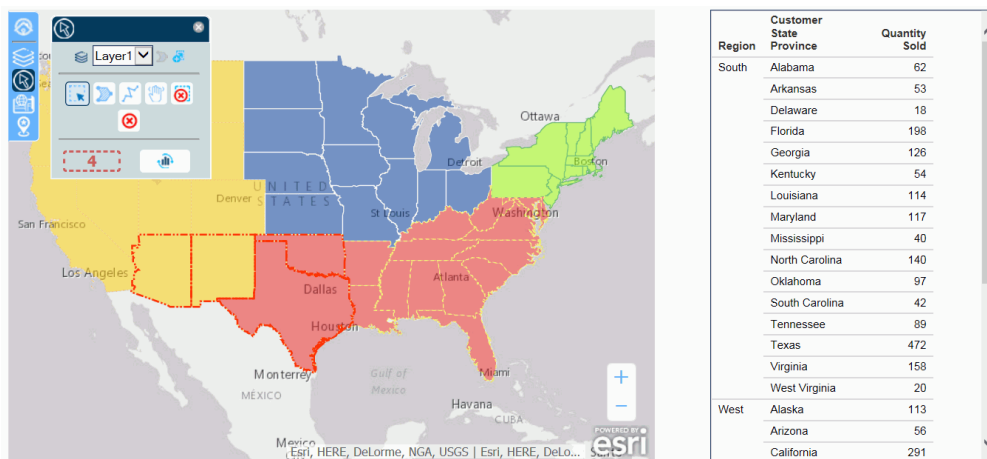
- 6. On the parameters tab, make the map parameter populate the report parameter (drag the REGION parameter onto the emfobject1 parameter and back down), as shown in the following image.



Run the HTML page. The output will be similar to the following:



Make a selection on the map using the selection widget. The report updates to show the selected points on the map, as shown in the following image, in which the South and West regions have been selected on the map.



Syntax: How to Drill Down From a WebFOCUS Request to Selections on a Map

The JavaScript function `IbComposer_selectEsriMap` can be used in a WebFOCUS StyleSheet to make a selection on a WebFOCUS request and zoom to that selection on a map. The syntax is.

```
TYPE=DATA,
  COLUMN=requestcol,
  JAVASCRIPT=parent.IbComposer_selectEsriMap( \
    'mapobject' \
    'maplayer' \
    'requestfield' \
    mapfield [\
    fieldvalue]
  ),
```

where:

`requestcol`

Is a designation for the drilldown column in the request.

`'mapobject'`

Is the object name for the map component that is the target of the drilldown.

`'maplayer'`

Is the name of the map layer that is the target of the drilldown.

'mapfield'

Is the name of the map field that is the target of the drilldown.

fieldvalue

Is the field value of the target field, passed from the request when a drill-down link is selected.

Example: Creating a Drilldown From a Report to a Map

This example has a report component named customer_states4 that has a drilldown from the REGION field to the map component. The syntax follows. Paste it into the Text Editor and save it as customer_states4.fex.

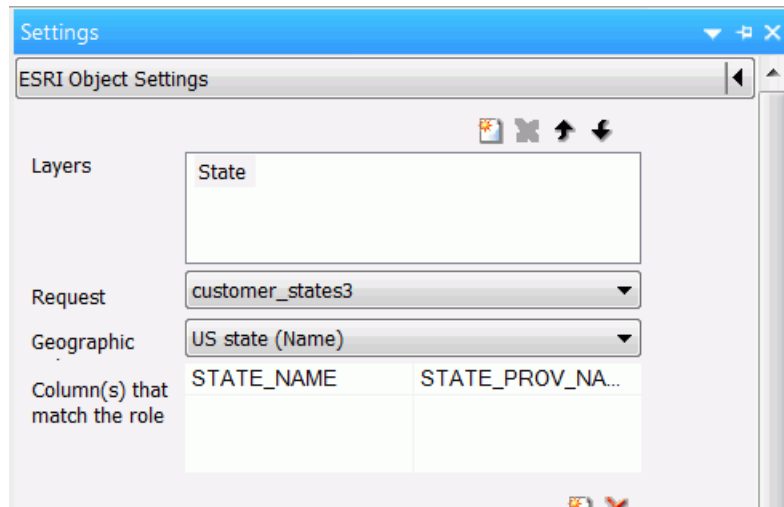
```
DEFINE FILE WF_RETAIL_LITE
STATE/A20 = WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.STATE_PROV_NAME;
REGION/A10 = IF STATE EQ 'Connecticut' OR 'Maine' OR 'Massachusetts' OR
'New Hampshire' OR 'Rhode Island' OR 'Vermont' OR
'New Jersey' OR 'New York' OR 'Pennsylvania' THEN 'Northeast'
ELSE IF STATE EQ 'Illinois' OR 'Indiana' OR 'Michigan' OR 'Ohio'
OR 'Wisconsin' OR 'Iowa' OR 'Kansas' OR 'Minnesota' OR 'Missouri'
OR 'Nebraska' OR 'North Dakota' OR 'South Dakota' THEN 'Midwest'
ELSE IF STATE EQ 'Delaware' OR 'Florida' OR 'Georgia' OR 'Maryland'
OR 'North Carolina' OR 'South Carolina' OR 'Virginia' OR
'Washington D.C.' OR 'West Virginia' OR 'Alabama' OR 'Kentucky' OR
'Mississippi' OR 'Tennessee' OR 'Arkansas' OR 'Louisiana' OR
'Oklahoma' OR 'Texas' THEN 'South' ELSE 'West';
END
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY REGION
BY STATE
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE SET PAGE NOLEAD
ON TABLE SET STYLE *
INCLUDE=ENWARM,$
TYPE=DATA,
    COLUMN=REGION,
    JAVASCRIPT=parent.IbComposer_selectEsriMap( \
'empfobject1' \
'State' \
'REGION' \
REGION \
),
$
END
```


The drilldown in the StyleSheet is on the REGION column. It uses the `IbComposer_selectEsriMap` function to target the map object on the State layer using the REGION field and the REGION values passed from the selected drill-down link.

The map component will use the `customer_states3` procedure, as described in the previous example.

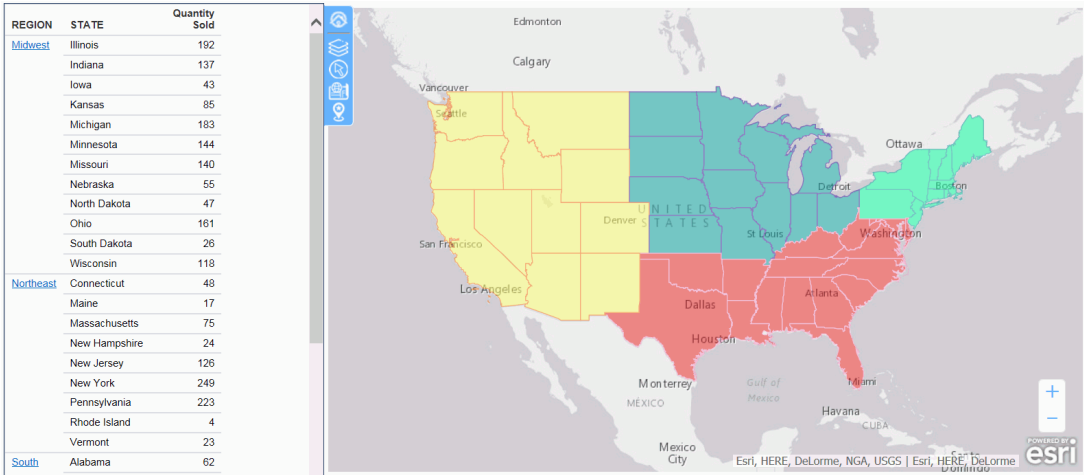
Use the following steps to set up the report request and map component.

- ❑ Add the `customer_states3` and `customer_states4` requests to the HTML page in the Requests & Data Sources panel.
- ❑ Add a Frame component on the HTML page.
- ❑ Set the Load task to run the `customer_states4` request in the Tasks & Animation panel, with the target being the frame you created.
- ❑ Add a map component next to the report frame on the HTML page. Configure it to use the `customer_states3` request, the US state (Name) geographic role, the `STATE_PROV_NAME` field. Name the layer State, as shown in the following image.

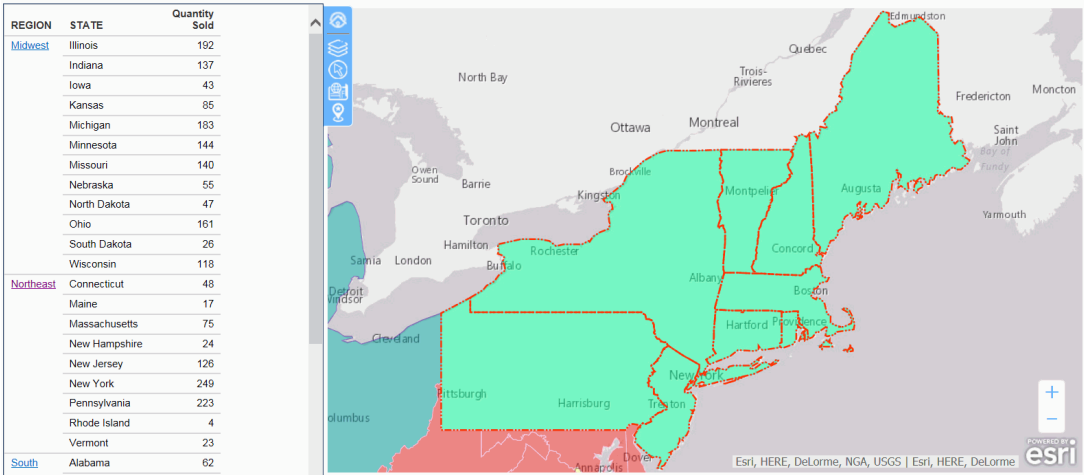


The map component in this example has been configured for unique symbology based on the REGION field, as described in [Configuring Unique Symbology for Polygons](#) on page 718.

Run the HTML page. The output should be similar to the following.



Click the *Northeast* link on the report. The map component zooms to that region with all of the states selected, as shown in the following image.



You can change the selection by clicking another drill-down link on the report. You can also change the extent or clear the selection using the map widgets.

Adding a Custom Geographic Role

Customers with Enterprise Data often have map layers that represent their territories, events or logistical information. These are published as Map Services to either a subscription based in the Esri Cloud (ArcGIS.com) or on an internal portal. This portal is available with ArcGIS Server 10.3 installations. More information can be found at <http://server.arcgis.com/en/portal/>.

App Studio comes with a configuration file (geo_services.xml) that contains elements that describe all of the geographic roles, geographic hierarchies, URLs to the map services, and base maps available to the Esri map viewer. This file is located in the catalog directory under the server home directory:

[_edahome/catalog/](#)

The geographic role selections that you can make in the App Studio Settings pane are built dynamically using this configuration file. Each role definition in the configuration file, when selected in App Studio, generates metadata and a request that is sent to Esri in order to download the appropriate map and place the markers or polygons on the map.

A geographic role can be part of a hierarchy. For example, the World geographic role is at the top of a hierarchy that contains continents, countries, states, and cities. These hierarchies are also described in the geo_services.xml file.

To add a custom geographic role, you must add the necessary parameters for the geography to this file.

Following standard xml syntax rules, each element is enclosed in element start and end tags (<elementname>, </elementname>), and attribute values are enclosed in double quotation marks (").

Reference: Geographic Role Definitions

A geographic role is stored as a *geo_role* element geo_roles element of the geo_services.xml file. A geographic role must be defined with:

- ❑ An ID that will identify the role in the configuration file.
- ❑ A format and length for the data to be returned.
- ❑ A role name.
- ❑ A display title for the role name (to appear as a selection in the App Studio Settings pane).
- ❑ An optional role format (if the role can have multiple formats, such as a name and an abbreviation).
- ❑ A display title for the format.

- ❑ A role type (GEOGRAPHY for polygons or GEOMETRY for points).
- ❑ An optional vocabulary rule element containing vocabulary elements for associating the role with a field in the metadata.

The following attributes define a geographic role.

id

Is an alphanumeric uppercase value, up to 50 characters, used to identify the geographic role.

type

Is the data type for the ID. Can be one of the following.

- ❑ **"alpha"** for alphanumeric data, formats An or In.
- ❑ **"integer"** for integer numeric data, format In.
- ❑ **"numeric"** for fractional numeric data, formats Pn.m, Dn.m, or Fn.m.
- ❑ **"text"** for text data, format TXn.

value_size

Is the optional number of characters in USAGE format length (any, if not set).

role_name

Is the name of the geographic role.

role_name_title

Is the title of the geographic role, to be displayed in the Settings pane for selection.

role_format

Is an optional format for the geographic role, useful when the role can be referenced using multiple formats, such as a name, an ISO code, and an abbreviation.

role_format_title

Is an optional title for the format of the geographic role. It will be shown in parentheses along with the role title in the Settings pane, for example, State (Abbreviation).

geo_type

Is one of the following predefined role types.

- ❑ **"geography"**, for geographic objects such as country or city.

- ❑ **"geometry"**, for geometry objects such as latitude, longitude, or geometry point and area.

vocabulary_rules

Is an element that consists of a group of vocabulary elements that explicitly describe column names for the geographic role. These rules will be used to select the best geographic data for the role.

Elements in a rule are connected by the Boolean logic operation OR (only one needs to be satisfied). Each vocabulary element contains words enclosed with special characters. Words in the rule element are connected by the Boolean logic operation AND (all need to be satisfied).

A word may be prefixed and/or suffixed with the percent character (%), which is a place holder for any sequence of characters. If an element contains more than one word, each word has to be prefixed by the character plus (+) or minus (-). Plus indicates that the word must be found in the column name. Minus indicates that word *must not* be found in the column name.

Example: Sample Geographic Role Definitions

The following defines the State Abbreviation geographic role. The role ID is USSTATE_ABBR. The role name is USSTATE with a role format of ABBR. The titles that show in the Settings pane are US state (Abbreviation). The format is A2, and the vocabulary rules specify that the characters *state* must be present, but the characters *iso*, *capital*, and *population* must not be present. The geo type is geography, indicating that the returned data will be a geographic area.

```
<geo_role
id="USSTATE_ABBR"
value_size="2"
type="alpha"
role_name="USSTATE"
role_name_title="US state"
role_format="ABBR"
role_format_title="Abbreviation"
geo_type="geography">
<vocabulary_rules>
<vocabulary>+%state%-%iso%-%capital%-%population%</vocabulary>
</vocabulary_rules>
</geo_role>
```

The following is a role definition for latitude values. The role ID is LATITUDE. The role name is also LATITUDE. Its format is numeric. The title that displays in the Settings pane is Latitude. The geo type is geometry, indicating that the returned data will be points or areas described using points. The vocabulary rules specify that the characters *latitude* must be present.

```
<geo_role
  id="LATITUDE"
  type="numeric"
  role_name="LATITUDE"
  role_name_title="Latitude"
  geo_type="geometry">
  <vocabulary_rules>
    <vocabulary>%latitude%</vocabulary>
  </vocabulary_rules>
</geo_role>
```

The following is the definition for the city role. The ID is CITY. The role name is also CITY. Its format is NAME. The title that displays in the Settings pane is City (Name). The definition has a set of vocabulary elements. Only one of the elements in the list must be true. Therefore, the characters *city*, or *town*, or *country* plus *capital*, or *state* plus *capital* must be present.

```
<geo_role
  id="CITY"
  type="alpha"
  role_name="CITY"
  role_name_title="City"
  role_format="NAME"
  role_format_title="Name"
  geo_type="geography">
  <vocabulary_rules>
    <vocabulary>+%city%-%population%</vocabulary>
    <vocabulary>+%town%-%population%</vocabulary>
    <vocabulary>+%country%+%capital%-%population%</vocabulary>
    <vocabulary>+%state%+%capital%-%population%</vocabulary>
  </vocabulary_rules>
</geo_role>
```

Reference: Geographic Hierarchy Definitions

Some geographic roles exist as part of a hierarchy, and the data for the hierarchical roles are stored at the same map services endpoint (URL). Hierarchical role relationships are stored as *hier* elements in the *geo_services.xml* file.

Hierarchy definitions provide WebFOCUS with the information needed to perform AutoDrilling from a geographic role at a higher level of the geographic hierarchy to a geographic role at a lower level of the geographic hierarchy.

Each hierarchy has the name of hierarchy (attribute ID) and a group of LEV elements with the attributes level, geo_role, and, optionally, value. Not all defined roles can be used in hierarchies. The same role can be included in more than one hierarchy and may be on different hierarchical levels in each. However, the same role cannot be used more than once in the same hierarchy. Multiple geographic roles can be assigned to the same hierarchical level in a hierarchy.

Geographic hierarchies are defined with the following attributes:

id

Is a name of up to 50 alphanumeric characters used to identify the hierarchy.

level

Is a natural number (integer starting with 1 for the top level) that specifies the level of the role within the hierarchy.

geo_role

Is the ID attribute of a geographic role (geo_role element).

value

Is an alphanumeric value, up to 50 characters, predefined for this geo role in this hierarchy.

Example: Sample Geographic Hierarchy Definition

The following element defines the world hierarchy. The top level is CONTINENT, both the Name role and the ISO code role. Level 2 has four COUNTRY geographic roles, corresponding to four different country formats. Level 3 contains two state formats, level 4 contains the city name, and level 5 contains the postal code.

```
<hier id="world">
<LEV level="1" geo_role="CONTINENT"/>
  <LEV level="1" geo_role="CONTINENT_ISO_CC"/>
  <LEV level="2" geo_role="COUNTRY"/>
  <LEV level="2" geo_role="COUNTRY_FIPS"/>
  <LEV level="2" geo_role="COUNTRY_ISO_CC"/>
  <LEV level="2" geo_role="COUNTRY_ISO_CC3"/>
  <LEV level="3" geo_role="STATE"/>
  <LEV level="3" geo_role="STATE_ISO_SUB"/>
  <LEV level="4" geo_role="CITY"/>
  <LEV level="5" geo_role="POSTAL_CODE"/>
</hier>
```

Reference: Adding the Federal Reserve Districts Geographic Role

These steps describe how to add the Federal Reserve Districts geographic role to the geo_services.xml file.

1. Open the geo_services.xml file. The default location is:

```
C:\ibi\AppData\Local\Esri\GeoServices\geo_services.xml
```

where *nn* is your release of App Studio. For example, 82 for version 8.2

2. Add the role to the end of the GEO_ROLES object:

```
<geo_role id="FED-DIST" value_size="50" type="alpha" role_name="FED-DIST"
  role_name_title="FED District" role_format="FR_District"
  role_format_title="FED District Name" geo_type="geography">
  <vocabulary_rules>
    <vocabulary>+%FR_District%</vocabulary>
  </vocabulary_rules>
</geo_role>
</GEO_ROLES>
```

The ID is FED-DIST. The role name is also FED-DIST. Its format is FR_District. The title that displays in the Settings pane is FED District. The definition has a vocabulary rule. The characters *FR_District* must be present.

3. Add this role to the US Hierarchy:

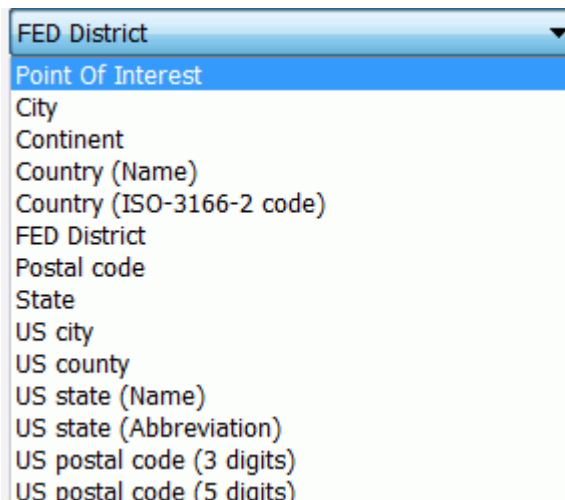
```
<hier id="US">
  <lev level="1" value="United States" geo_role="COUNTRY"/>
  <lev level="1" value="US" geo_role="COUNTRY_ISO_CC"/>
  <lev level="1" value="USA" geo_role="COUNTRY_ISO_CC3"/>
  <lev level="2" geo_role="USSTATE"/>
  <lev level="2" geo_role="USSTATE_ABBR"/>
  <lev level="2" geo_role="USSTATE_FIPS"/>
  <lev level="3" geo_role="USCOUNTY"/>
  <lev level="4" geo_role="USCITY"/>
  <lev level="4" geo_role="USCITY_FIPS"/>
  <lev level="5" geo_role="ZIP3"/>
  <lev level="5" geo_role="ZIP5"/>
  <lev level="6" geo_role="FED-DIST"/>
</hier>
```


4. Add the URI to the map server layer for this role at the end of the URIS object:

```
<uri description="FedReserve Districts">
  <returned_geometry>GEOMETRY_AREA </returned_geometry>
  <returned_georole>FED-DIST</returned_georole>
  <url type="esri" authorization="none"
  synonym="">http://services7.arcgis.com/L95Ww90JQtAs/arcgis/rest/services/FEDISTRICTS/FeatureServer/0</url>

  <parameters>
    <parm order="1" parm_name="FR_District" parm_georole="FED-DIST"/>
  </parameters>
</uri>
</URIS>
```

You will now be able to select this role in the settings panel the next time you start App Studio, as shown in the following image.



Example: Using the FED District Role in a Map Layer

This example configures a map layer using the FED District role.

You can create a request using the Report Canvas or by entering request syntax in the Text Editor. For information about creating a WebFOCUS report request using the Report Canvas, see [Creating Reports in WebFOCUS App Studio](#) on page 241.

Following is the syntax for a WebFOCUS procedure that returns the Federal Reserve district names. Paste this procedure into the text editor and save it as customer_districts.fex.

```
DEFINE FILE WF_RETAIL_LITE
FR_District/A20 = WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.CITY_NAME;
END
TABLE FILE WF_RETAIL_LITE
SUM QUANTITY_SOLD
BY FR_District
WHERE WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.COUNTRY_NAME EQ 'United
States'
WHERE WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.CITY_NAME EQ 'Kansas
City' OR 'Atlanta' OR
'St. Louis' OR 'Boston' OR 'Dallas' OR 'San Francisco' OR
'Philadelphia' OR 'Minneapolis'
OR 'Richmond' OR 'Chicago' OR 'New York' OR 'Cleveland'
ON TABLE PCHOLD FORMAT XML
END
```

Add the external WebFOCUS procedure `customer_districts.fex` to the HTML page using the Requests & Data Sources panel.

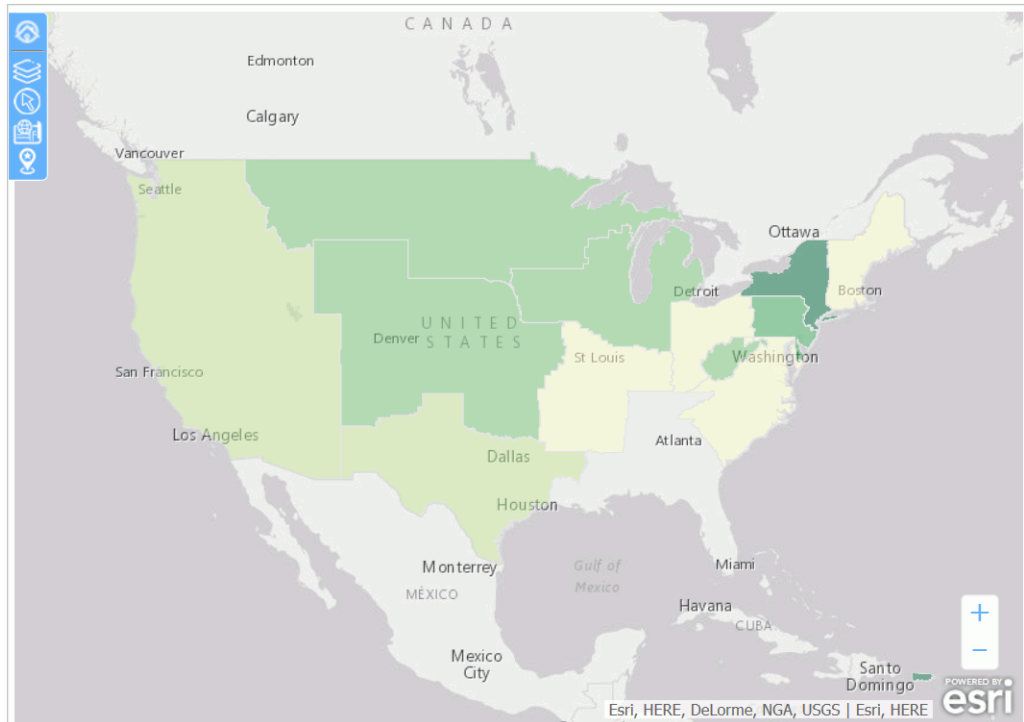
Next, use the Settings panel to configure the map layer. The layer uses the default visualizations. It uses the `customer_districts` request and the FED District geographic role. It configures the Natural Jenks Color symbology, as shown in the following image.

The screenshot shows the 'Settings' panel in WebFOCUS App Studio, specifically the 'ESRI Object Settings' section. The panel is configured for a map layer named 'Layer1'. The 'Request' is set to 'customer_districts', and the 'Geographic' role is 'FED District'. The 'Column(s) that match the role' are 'FR_District'. The 'Layer Attributes' section is empty. The 'Unique Id' field is also empty. The 'Layer Visualizations' section shows 'Transparency' set to 50, 'Enable Popups' set to Off, 'Default Visibility' set to On, and 'Default Extent' set to Off. The 'Symbol Settings' section shows 'Use' set to 'Color', 'Using Field' set to 'QUANTITY_SOLD', 'By' set to 'Natural Jenks', 'Number of classes' set to 5, and a color scheme with five green shades.

Layer Visualizations	
Transparency	50
Enable Popups	Off
Default Visibility	On
Default Extent	Off

Symbol Settings	
Use	Color
Using Field	QUANTITY_SOLD
By	Natural Jenks
Number of classes	5
Color Scheme	[Color bar with 5 green shades]

Run the HTML page. The output is shown in the following image:



In App Studio, you can create, view, and edit the source syntax for procedures, procedure components, and other types of files required by your projects.

This topic describes the Text Editor that is available when you are developing the source syntax for procedures, procedure components, and other types of files.

In this chapter:

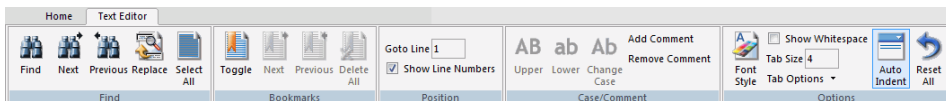
- ❑ [Accessing the Text Editor](#)

Accessing the Text Editor

App Studio provides a fully integrated Text Editor that you can use to create, view, and edit the source syntax for procedures, procedure components, and other types of files required by your applications.

You can access the Text Editor tab by selecting *Procedure via Text Editor* or *Text Document* in the New dialog box, or by right-clicking a procedure in the Environments Tree panel and selecting *Open in Text Editor*. You can also access the Text Editor tab by selecting the Embedded JavaScript/CSS view tab in the HTML canvas. Some commands are unavailable while in the Text Editor tab accessed through the Embedded JavaScript/CSS view tab.

The Text Editor tab is shown in the following image.



Note: The Text Editor tab shares groups with the Command Console tab. However, in addition to these groups, the Command Console contains the Execution Path and Edit groups. For more information, see [Sending Commands to the Server Using the Command Console](#) on page 88.

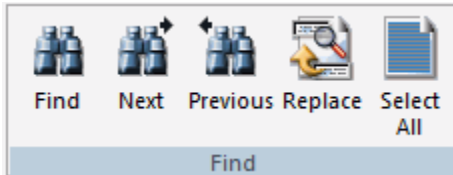
In addition, you can:

- ❑ Take advantage of color-coded syntax designed to make writing, editing, and debugging procedures easier.
- ❑ Bookmark lines of a file for quick editing and easy reference.

- ❑ Find and replace text.
- ❑ Run procedures or procedure components directly from the Editor.

Finding or Replacing Text Using the Find Group

The Find group contains options that enable you to find or replace text. The Find group is shown in the following image.



The commands in this group are:

Find

Finds the specified text. You can also press Ctrl+F to activate the Find dialog box.

Next

Finds the next instance of the specified text.

Previous

Finds the previous instance of the specified text.

Replace

Replaces specific text with different text.

Select All

Selects all of the text in the procedure.

Reference: Find Dialog Box

You can use the options on the Find dialog box to indicate how to search for information.

The options on the Find dialog box are:

Find what

Provides a text box where you can specify the text that you want to find. Optionally, you can click the arrow to select a search term or phrase that was previously specified.

Match whole word only

Select this option to match the whole word only.

Match case

Select this option to match the uppercase or lowercase value, as specified in the Find what field.

Direction

Select up or down to indicate the direction in which the Text Editor should search.

Find Next

Allows you to find the next instance of your search term.

Mark All

Marks all instances of your search term in the Text Editor.

Cancel

Cancels the current search and closes the Find dialog box.

Reference: Replace Dialog Box

You use the options on the Replace dialog box to indicate how to use the find feature to find and replace information.

The options on the Replace dialog box are:

Find what

Provides a text box where you can specify the text that you want to find. Optionally, you can click the arrow to select a search term or phrase that was previously specified.

Replace with

Provides a text box where you can specify the text that is going to replace the text for which you are searching. Optionally, you can click the arrow to select a replacement term or phrase that was previously specified.

Match whole word only

Select this option to match the whole word only.

Match case

Select this option to match the uppercase or lowercase value, as specified in the Find what and Replace with fields.

Replace In

Enables you to specify where you would like the replacement to occur. Options include Selection or Whole file.

Find Next

Allows you to find the next instance of your search term.

Replace

Replaces the search information that you specified in the Find next field with the text or other information that you indicated in the Replace with field.

Replace All

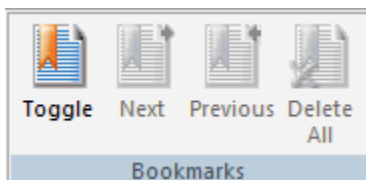
Allows you to automatically replace all instances of the search term you indicated in the Find next field with the information you specified in the Replace with field.

Cancel

Cancels the current search and replaces and closes the Replace dialog box.

Working With Bookmarks Using the Bookmarks Group

The Bookmarks group enables you to turn bookmarks on or off, find the next bookmark, find the previous bookmark, and delete all bookmarks. The Bookmarks group is unavailable when you access the Text Editor tab through the Embedded JavaScript/CSS view tab, in the HTML canvas. The Bookmarks group is shown in the following image.



The commands are:

Toggle

Turns bookmarks on or off.

Next

Goes to the next bookmark.

Previous

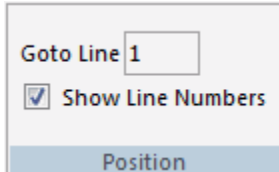
Goes to the previous bookmark.

Delete All

Deletes all bookmarks.

Placing the Cursor Using the Position Group

The Position group allows you to place your cursor at the desired line and allows you to turn off line numbers. The Position group is shown in the following image.



The commands are:

Goto Line

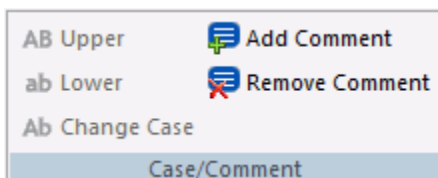
Displays the current line your cursor is on. You can type a different line number into the text box to place your cursor on that line.

Show Line Numbers

When selected, displays line numbers. This option is selected, by default.

Changing the Case of Text Using the Case/Comment Group

The Case/Comment group contains options for changing selected text to uppercase or lowercase. The Case/Comment group is unavailable when you access the Text Editor tab through the Embedded JavaScript/CSS view tab, in the HTML canvas. The Case/Comment group is shown in the following image.



The commands are:

Upper

Changes the selected text to uppercase (all capital letters).

Lower

Changes the selected text to lowercase (all lowercase letters).

Change Case

Changes the case of the selected text to lowercase or uppercase depending on how the selected text appeared first. You can also change the case of selected text by using the shortcut menu on the canvas, while text is selected.

Add Comment

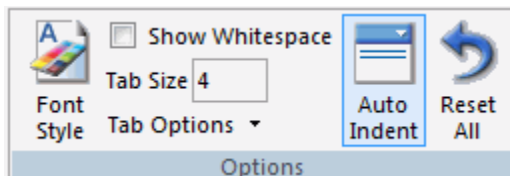
Inserts a new comment line if your pointer appears on a new line or changes an active line of text to a comment. You can also use the shortcut menu on the canvas to add a comment.

Remove Comment

Deletes the previous comment change. This option is similar to the Undo command on the Quick Access Toolbar. You can also use the shortcut menu on the canvas to remove a comment.

Formatting Text Using the Options Group

The Options group contains commands that you can use to format the text in a procedure. The Options group is unavailable when you access the Text Editor tab through the Embedded JavaScript/CSS view tab, in the HTML canvas. The Options group is shown in the following image.



The commands are:

Font Style

Opens the Font and Color Settings dialog box from which you can modify the appearance of the syntax in a procedure.

Show Whitespace

Replaces spaces between characters with a visual indicator.

Tab Size

Controls the number of spaces a tab character uses.

Tab Options

Provides the options to control tab characters. You can substitute spaces for tab characters or keep tab characters in the syntax.

Auto Indent

Automatically indents the syntax within a procedure.

Reset All

Restores all options back to the default settings.

Troubleshooting App Studio

The following topics explain how to troubleshoot App Studio.

In this appendix:

- ❑ [Troubleshooting Tips](#)
 - ❑ [Troubleshooting Tools](#)
-

Troubleshooting Tips

Review the following tips when troubleshooting App Studio.

Tomcat Configuration Options

Since Tomcat runs as a service, Tomcat Java settings and other parameters are written into the registry. They can be configured through the Apache Tomcat Properties window. You can launch this from the Start menu by selecting *All Programs, Information Builders, Tomcat, and Tomcat Configuration Utility*.

If you need to adjust the Java release, click the *Java* tab to change where Tomcat looks for Java components. Be aware that Tomcat 8.0 requires Java 7 or later.

Note: Tomcat 8.0 requires Java 7 or later. If Tomcat 8.0 is configured to use Java 6, JSP page compilations will fail. To fix this, update the paths to point to the *jvm.dll* file of a supported Java version.

Java Memory Issues

If the App Studio installation configured Tomcat for you, the Tomcat Java VM memory settings are automatically increased. This is done because default application server Java VM memory options may not be sufficient for some WebFOCUS features. If you need to troubleshoot further or if you manually install Tomcat or another application server, you may need to manually increase the Java VM memory options.

The most common Java VM options you need to set involve the size of the Java heap and stack, which determine memory availability for Java programs and the Java VM. Errors can occur if not enough memory is available, and the heap size impacts performance, since it determines how often garbage collection occurs.

The following are the most common Java VM options related to memory settings. Replace the ### with the size you wish to set:

`-Xmx###M`

Sets the maximum Java heap size. It is common to make this 1/4 of the system RAM.

`-Xms###M`

Sets the initial Java heap size. It is common to make this 1/8 of the system RAM.

`-Xss###M`

Sets the Java thread stack size. You do not need to set this unless you are fine tuning your environment.

The size is normally set in megabytes, for example:

`-Xms256M`

`-Xmx512M`

Optimum sizes vary depending on your total memory, the needs of your application, how many other processes require memory, the type of Java VM, and other considerations. A good starting place is to set the minimum to 1/8 of the total RAM and set the maximum to 1/4 of total RAM.

Where to set these and other Java VM options depend on your application server.

- ❑ For Tomcat on Windows, you can set these options using the Apache Tomcat Properties window.
 1. From the Start menu, select *All Programs, Information Builders, Tomcat, and Tomcat Configuration Utility*.
 2. Click the *Java* tab.
 3. In the Initial memory pool (-Xms) field, specify the initial Java heap size in megabytes. For example:
`256`
 4. In the Maximum memory pool (-Xmx) field, specify the maximum Java heap size in megabytes. For example:
`512`
 5. Click *OK*.
 6. Restart Tomcat.
- ❑ For other application servers, refer to your application server documentation.

Starting App Studio

If you close App Studio and then cannot restart it, you may need to manually stop the underlying `focshell.exe` process. To do this:

1. Press Ctrl + Alt + Delete and choose *Task Manager*.
2. Click the *Processes* tab.
3. Find and select a `focshell.exe` Image Name if it appears.

Note: You can click the Image Name column to sort by name.

4. Click *End Process*.

You should be able to restart App Studio if no `focshell.exe` processes appear.

Manual Registration to Enable Multiple Browser Support in App Studio

Developers can use Chrome™, Firefox®, Internet Explorer®, Edge®, or the internal viewer when running reports. To use Chrome or Firefox, the product requires registration of the `IBIWebBrowserDrivers_dotnet_35.dll` .NET module that is included with the product.

To register this file, .NET version 4.0 is required. This version of .NET is preinstalled on most machines. If your machine does not have this .NET version, it will be installed during the App Studio installation process and the module needed to support multiple browsers will get registered.

In a few cases, on Windows 8.1 machines where the registration of the module fails, the developer will not be able to switch browsers. To address this issue, the developer must register the required module manually. To do this, open a Command Window, with the option Run as administrator, and run the following commands:

```
%SystemRoot%\Microsoft.NET\Framework64\v4.0.30319\RegAsm
C:\ibi\AppStudio82\bin\ibiwebbrowserdrivers_dotnet_35.dll /u
```

A message should display that the file unregistered successfully.

Then run:

```
%SystemRoot%\Microsoft.NET\Framework64\v4.0.30319\RegAsm
C:\ibi\AppStudio82\bin\ibiwebbrowserdrivers_dotnet_35.dll
```

A message should display that the file registered successfully.

where:

`%SystemRoot%`

Is the location of the Windows folder on your machine. This includes the drive and path. It is usually the C drive. For example, `C:\Windows`.

Note:

- ❑ Adjust the above commands based on location of the App Studio installation location.
- ❑ The commands in the documentation are shown in two separate lines, but they should be issued as one command.

Troubleshooting Tools

Tools to troubleshoot App Studio are available in the WebFOCUS Administration Console, App Studio program folder, and Reporting Server Console.

Accessing the Verification Tools in the WebFOCUS Administration Console

To run the verification tools installed with the WebFOCUS Administration Console, access the console.

Procedure: How to Access the WebFOCUS Administration Console

1. Ensure that Apache Tomcat and/or IIS are started.
2. From the Windows Start menu, select *All Programs, Information Builders, WebFOCUS 82 App Studio, WebFOCUS App Studio Utilities*, and then click *WebFOCUS Administration Console*.

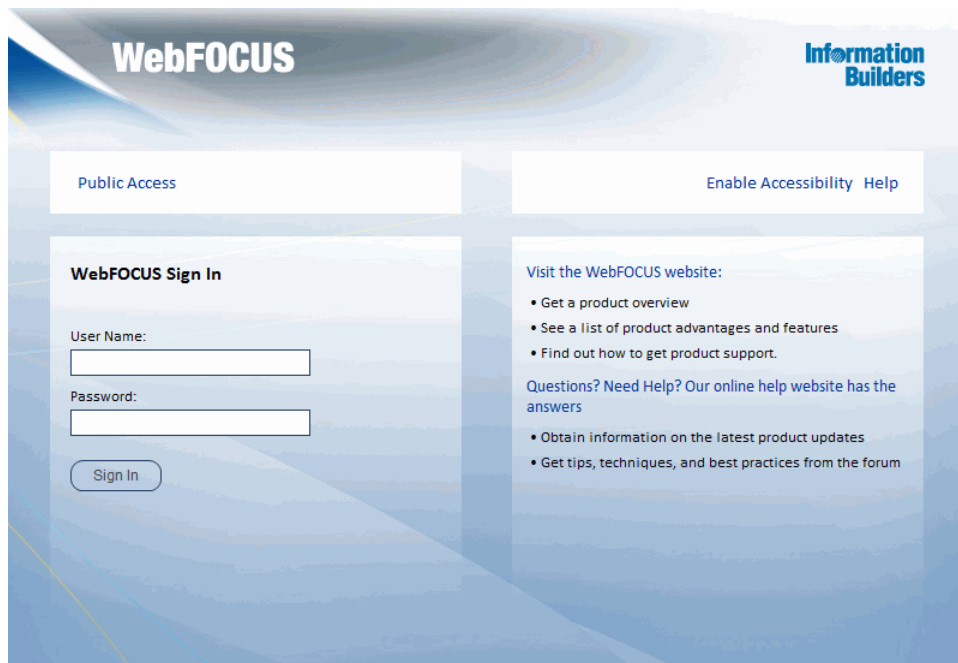
If you are using Apache Tomcat standalone, you can also go to:

http://localhost:8080/ibi_apps/console/webfocusconsole.jsp

For IIS with Tomcat, you can go to:

http://localhost/ibi_apps/console/webfocusconsole.jsp

The WebFOCUS Sign In page opens, as shown in the following image.



If the WebFOCUS Sign In page does not appear, ensure that your web server is started. If the web server is started and this page does not appear, you may need to manually configure the web server.

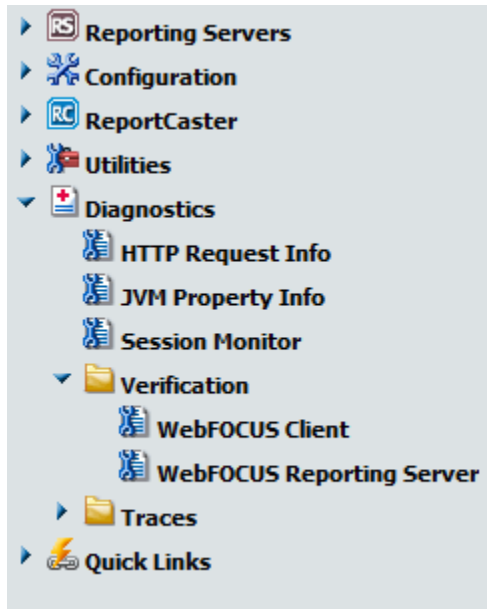
3. Sign in using an administrator user ID. The initial default user name and password is *admin*.

The WebFOCUS Administration Console opens, as shown in the following image.



Using this console, you can edit various configuration settings. Information about the various settings in this console can be found by clicking *Help*. The WebFOCUS Administration Console contains a verification tool to further test the configuration.

4. On the left of the WebFOCUS Administration Console, expand *Diagnostics*.



Several tests are available from the Diagnostics node.

Procedure: How to Test the WebFOCUS Client

Expand *Verification* and then click *WebFOCUS Client*.

A page similar to the following image appears on the right with a list of tests. The list varies depending on your license and configuration. For a Tomcat standalone configuration, the web/app server tests may not appear.

Client Path: /ibi_apps/console/WFConsole.cfg

Test Area	Description	Result
WebFOCUS	Create Application	Pass
Configuration	Delete Application	Pass
WebFOCUS	Read from wfc/etc Directory	Pass
Client	Write to wfc/etc Directory	Pass
Configuration	Read from wfc/web/cgi Directory	Pass
	Write to wfc/web/cgi Directory	Pass
	Read a config file from C:\ibi\AppStudio81\config	Pass
	Write a config file to C:\ibi\AppStudio81\config	Pass
WebFOCUS	Create a temporary file in C:\ibi\AppStudio81\temp	Pass
Temporary	Read a temporary file from C:\ibi\AppStudio81\temp	Pass
Directory	Delete a temporary file from C:\ibi\AppStudio81\temp	Pass
WebFOCUS	Create a trace file in C:\ibi\AppStudio81\logs	Pass
Logs	Read a trace file from C:\ibi\AppStudio81\logs	Pass
Directory	Delete a trace file from C:\ibi\AppStudio81\logs	Pass

If a test fails, a Possibilities link appears providing information on what the problem might be and possible solutions. The verification tools are only supported with Internet Explorer, and you may receive errors if you use other browsers.

Procedure: How to Test the WebFOCUS Reporting Server

Expand *Verification* and then click *WebFOCUS Reporting Server* to test the connection between the WebFOCUS Client and the WebFOCUS Reporting Server.

The Client Path field is displayed with the path to the WFConsole.cfg file. You are also allowed to select a node in the Remote Services area.

This will test the connection between the client and the WebFOCUS Reporting Server.

Client Path

Remote Services

	Node Name	Class	
<input checked="" type="radio"/>	EDASERVE	CLIENT	Default

Automatic Test
Test AdHoc Procedure
Test Existing Procedure
Open Server Console

The Client Path specifies how the connection is made. The default servlet URL appears.

You can test the following areas:

- ❑ **Automatic Test.** Checks connections and checks to see if you can list applications under the approot directory, if you can create and delete an application, and if you can run stored procedures and ad hoc reports. When you are finished, click *Back* to return to the previous screen.
- ❑ **Test AdHoc Procedure.** Opens a window containing a default ad hoc procedure. You will be prompted for credentials if the server is secure. Click *Run* to execute the procedure, or you can edit the procedure first. You can also change the application path (using APP PATH, not EDAPATH). The procedure can consist of WebFOCUS or SQL commands. When you are finished, click *Back* to return to the previous screen.
- ❑ **Test Existing Procedure.** Allows you to type an existing procedure name and any necessary parameters. The procedure must be stored on the WebFOCUS Reporting Server. You can also change the application path. Click *Run* to execute the procedure. When you are finished, click *Back* to return to the previous screen.
- ❑ **Open Server Console.** Opens the Reporting Server Console.

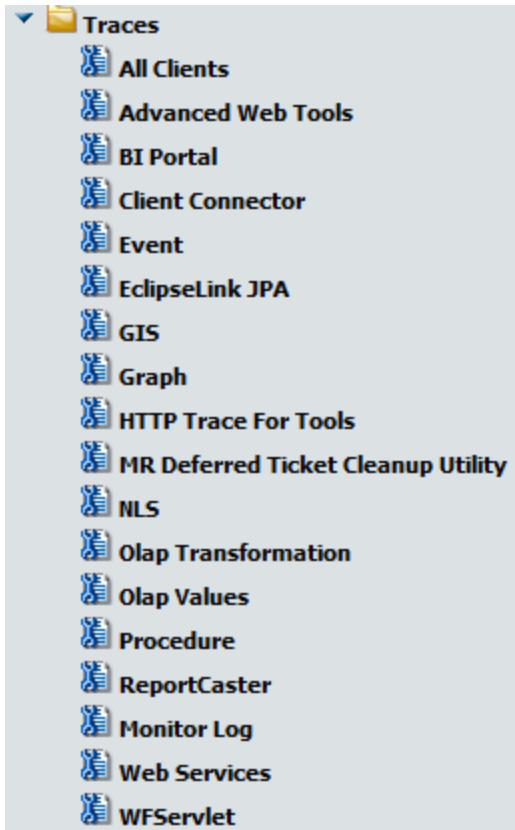
WebFOCUS Client Traces

The Diagnostics menu in the WebFOCUS Administration Console lets you view and delete WebFOCUS Client trace files. Trace files track requests processed by the WebFOCUS Client. Since tracing can slow performance, you should only turn on traces when troubleshooting.

Procedure: How to View WebFOCUS Client Traces

In the left pane of the WebFOCUS Administration Console, expand *Diagnostics*, and then expand *Traces*. You can view the trace files by selecting the type of trace from the list. For example, to view traces generated by the WebFOCUS Servlet, in the left pane of the WebFOCUS Administration Console, under *Diagnostics* and *Traces*, select *WFServlet*.

Note: The Trace files that are listed depend on the installation option of the environment to which you are connected.



The following image shows the WebFOCUS client traces screen.

WFServlet

Tracing is currently turned on. To turn tracing off, click [Trace off](#)

Trace Directory: C:/ibi/AppStudio82/logs

Select	Trace File	Query String	Size
<input type="checkbox"/>	00107 WFServlet WFAPI 150728 085424.trace		30 KB
<input type="checkbox"/>	00108 WFServlet WFAPI 150728 085424.trace		31 KB
<input type="checkbox"/>	00109 WFServlet WFAPI 150728 085425.trace		21 KB

A page lists any generated traces. The first column lists the generated trace file. The second column shows a timestamp for when the request ran. You can view a trace file by clicking it.

For more information about the available trace options, click *Help* in the top-right corner of the WebFOCUS Administration Console.

App Studio Trace Utility

The App Studio trace utility (Communication Layer Trace) generates trace files for tasks performed by the App Studio development environment communication layer. It captures information for tasks performed by App Studio when a request is submitted or retrieved by the product.

You can use this utility to help troubleshoot issues, such as communication failures, connection problems, and transfer of files.

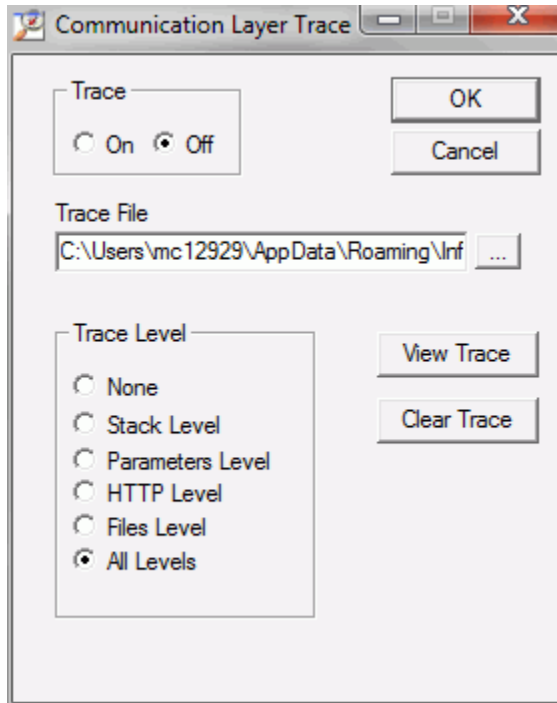
To generate traces for issues you might encounter at startup, you should start the trace utility prior to launching App Studio.

To generate traces for a failure to connect to a Data Server or to determine why applications are not listed, you should start and enable the trace at the point prior to performing the task that fails.

Procedure: How to Use the Communication Layer Trace

1. Launch the Communication Layer Trace from the Windows Start menu by selecting *All Programs, Information Builders, WebFOCUS 82 App Studio, WebFOCUS App Studio Utilities, and Communication Layer Trace*.

The Communication Layer Trace tool opens, as shown in the following image.



2. Click the *On* radio button to enable tracing.
3. The Trace File field indicates the location and name of the trace file. The default trace file is created in the following location for Windows 7:

```
drive:\Users\user_id\AppData\Roaming\Information Builders\
wfscom.xml
```

where:

```
user_id
```

Is your Windows user ID.

Note: The Application Data directory may not be visible by default. To see this directory, open Windows Explorer, click *Tools*, choose *Folder Options*, and select the *View* tab. Then select *Show hidden files and folders* and click *OK*.

4. In the Trace Levels area, keep the default *All levels* to capture all required information or specify a specific level.

WebFOCUS Reporting Server Traces

You can turn WebFOCUS Reporting Server traces on when you start the server or dynamically after the server has started.

- ❑ To start the server with traces, you should start it before App Studio by selecting *All Programs* from the Start menu, then *Information Builders, WebFOCUS 82 App Studio, WebFOCUS Server for App Studio, Diagnostic Functions, and Start Security OFF with Traces*.
- ❑ To turn traces on dynamically, access the Server Console and select *Workspace, Diagnostics, and Traces*.

Note: Viewing traces is only available to a server administrator.

You can use the Reporting Server Console to view server traces, as well as turn them dynamically on or off for a running server.

If tracing is set to off and it was never turned on, the page shows that no traces are available and enables you to turn traces on. If tracing is on, the page displays the available traces in drop-down boxes. Which traces are available depends on what requests were made against the server.

To turn traces on dynamically, click *Enable Traces*. Be aware that a dynamic trace is not the same as turning traces on at server startup. A dynamic trace is usually not sufficient for following a problem through with Customer Support, but it may suffice for other purposes, such as seeing how something is parsed.

Note: The default for tracing is to trace all components when tracing is turned on. However, the trace settings file (ibitrace.fex) may have been altered. Therefore, components that you expect to be traced may not be traced.

Procedure: How to View a Trace File

1. Open the Web Console by selecting *All Programs* from the Start menu, then pointing to *Information Builders, WebFOCUS 82 App Studio, WebFOCUS Server for App Studio*, then clicking *Web Console*.
2. Click the *Workspace* tab.
3. In the left panel, expand the *Logs and Traces* folder.
4. Double-click *Traces*, or right-click *Traces* and click *View*.
A list of traces displays in the right panel.
5. Right-click a specific trace file and then choose from the following options:

- ❑ **View.** Displays the trace in the right-hand browser pane.
- ❑ **Open or Save.** Enables you to open the trace in a local editor or to save it to a local disk.
- ❑ **Delete.** Deletes the selected trace.

The file opens, or is deleted, according to the option you choose.

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WebFOCUS

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Information Builders, Inc.
Two Penn Plaza
New York, NY 10121-2898

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