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Platform-Specific Methods for Setting EDAEXTSEC ............................ 709
Preface

This content describes how to use the Web Console to configure, operate, monitor, tune, and troubleshoot the Server. It is intended for server administrators, database administrators, and application developers.

How This Manual Is Organized

This manual includes the following chapters:

<table>
<thead>
<tr>
<th>Chapter/Appendix</th>
<th>Contents</th>
</tr>
</thead>
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<tr>
<td>1 Server Introduction</td>
<td>Describes how to use the console and provides an overview of server configuration.</td>
</tr>
<tr>
<td>2 Server Security</td>
<td>Describes security modes and their authentication process.</td>
</tr>
<tr>
<td>3 Managing Applications</td>
<td>Describes how to work with Application Files, how to control the APP environment, and how to use APP methods to simplify the process of moving a user application from one platform to another.</td>
</tr>
<tr>
<td>4 Managing Adapters</td>
<td>Provides general information on configuring adapters and outlines configuration options.</td>
</tr>
<tr>
<td>5 Metadata</td>
<td>Discusses how to create a synonym using the Web Console.</td>
</tr>
<tr>
<td>6 Stored Procedures</td>
<td>Explains how using procedures enables application logic to be written once and executed many times, and how the Procedures page enables the creation and testing of stored procedures.</td>
</tr>
<tr>
<td>7 Server Workspace Manager</td>
<td>Describes how to run, monitor, and tune your server.</td>
</tr>
<tr>
<td>8 Listeners and Special Services</td>
<td>Describes how to manage listeners and special services.</td>
</tr>
<tr>
<td>9 Troubleshooting</td>
<td>Explains how to perform problem analysis tasks.</td>
</tr>
<tr>
<td>A Unicode Support</td>
<td>Introduces the unicode standard and describes the WebFOCUS Reporting Server implementation.</td>
</tr>
</tbody>
</table>
## Platform-Specific Methods for Specifying EDAEXTSEC

Describes how to set the EDAEXTSEC variable in each server operating environment.

## Conventions

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

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>THIS TYPEFACE or this typeface</td>
<td>Denotes syntax that you must enter exactly as shown.</td>
</tr>
<tr>
<td>this typeface</td>
<td>Represents a placeholder (or variable) in syntax for a value that you or the system must supply.</td>
</tr>
<tr>
<td>underscore</td>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td>this typeface</td>
<td>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.</td>
</tr>
<tr>
<td>Key + Key</td>
<td>Indicates keys that you must press simultaneously.</td>
</tr>
<tr>
<td>{  }</td>
<td>Indicates two or three choices. Type one of them, not the braces.</td>
</tr>
<tr>
<td>[  ]</td>
<td>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.</td>
</tr>
<tr>
<td></td>
<td>Separates mutually exclusive choices in syntax. Type one of them, not the symbol.</td>
</tr>
<tr>
<td>...</td>
<td>Indicates that you can enter a parameter multiple times. Type only the parameter, not the ellipsis (...).</td>
</tr>
<tr>
<td>Convention</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-------------</td>
</tr>
<tr>
<td>.</td>
<td>Indicates that there are (or could be) intervening or additional commands.</td>
</tr>
</tbody>
</table>

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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 most effectively, be ready to provide the following information when you call:

- Your six-digit site code (xxxx.xx).

- Your configuration:
  - The software version and release. You can find your server version and release using the Version option in the Web Console.

    **Note:** The MVS and VM servers do not use the Web Console.

  - The communications protocol (for example, TCP/IP or LU6.2), including vendor and release.

  - The stored procedure (preferably with line numbers) or SQL statements being used in server access.

  - The database server release level.

  - The database name and release level.

  - 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

In an effort to produce effective documentation, the Technical Content Management staff welcomes your opinions regarding this document. You can contact us through our website http://documentation.informationbuilders.com/connections.asp.

Thank you, in advance, for your comments.

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Chapter 1

Server Introduction

The Web Console enables you to configure, operate, monitor, tune, and troubleshoot the server environment from a single, easy-to-use interface.

In this chapter:

- Using the Web Console
- Menu Options
- Other Icon Options
- Configuration Overview
- Server Profiles
- Profile Commands

Using the Web Console

The Web Console enables you to remotely view and manage the server environment. From a single, easy-to-use interface, you can:

- Select, add, and configure data adapters.
- Create and manage adapter metadata.
- Control data access and security.
- Configure remote servers.
- Configure, edit, and run applications and deferred query processing.
- Configure communications and special services.
- Operate, monitor, tune, and troubleshoot your server.
- Edit configuration files.
- Migrate from a previous server release.
- Control aspects of your own environment.
Procedure: How to Open the Web Console

To open the Web Console:

1. If the server is not running, start it using the instructions for your platform in the installation guide.

2. Type the following URL in the address bar of the web browser:

   \[ \text{http://ip}\_\text{address:}\text{http}\_\text{service} \]

   where:

   - \textit{ip_address} is the IP address of the machine on which the server is running.
   - \textit{http_service} is the value for HTTP Service entered during the server configuration procedure.

   - If you have trouble contacting the server, see \textit{Troubleshooting the Console} on page 683.

   - If you are running your server with security, see \textit{Security Providers} on page 40 for information on the requirements and options associated with the security mode you are using.

The Web Console home page opens, as shown in the following image. The menu bar provides access to the different features of the Web Console.

3. Select an option from the menu bar to access the corresponding console page and ribbon. For tasks that display information or require no additional navigation, the console displays corresponding information in the right pane. For tasks that require additional task-centered navigation, the console opens a new ribbon or window. Use the navigation pane of the new window on the left to access the corresponding information in the right pane.
On Web Console navigation panes:

- Right-click behavior opens pop-up menus, by default.
- Double-click behavior executes the first option on a pop-up menu.

The console offers online help with two kinds of links to appropriate sections of this documentation:

- Click *Help* on the menu bar and choose *Contents and Search* to display the full Web Console help system.
- Click the ? icon, when available, to display contextual help specific to the item.

**Web Console Ribbon**

Web Console functionality is available through a ribbon or through the menu at the top of the page. The ribbon is the default, and it can be toggled on and off using the Show Ribbon (down arrow) and Hide Ribbon (up arrow) icons on the right of the menu bar.

The ribbon available from the Applications page is shown in the following image.

![Web Console Ribbon](image)

The interface includes the following areas:

- The left portion of the Main Menu bar, as shown in the following image.

![Left Main Menu](image)

- The right portion of the Main Menu bar, as shown in the following image.

![Right Main Menu](image)

On the right area of the Web Console menu bar, a menu under the user ID of the connected user is displayed, if the server is running with security on. If it is not running with security on, a User menu appears. In addition, there are links to sign out and to open the help content.

- The ribbon.
The ribbon provides the same options that are available from the right-click menus of the top nodes in the navigation pane. If the ribbon is hidden, the following menu icon at the left of the menu bar also provides the same options.

Menu Options

Each Console page provides options on the ribbon, the menu icon (if the ribbon is hidden), and the right-click options from the top node of its tree.

To hide the ribbon, click the up arrow on the right portion of the menu bar. Once the ribbon is hidden, the arrow changes to a down arrow. To show the ribbon, click the down arrow on the right portion of the menu bar.

The left portion of the menu bar provides quick links to the main Web Console pages.

The following options are available on the right portion of the Main Menu bar.

Scalability

This option provides the ability to run stress tests on the server. For more information, see Recording and Reproducing User Actions on page 672.

User Menu Options

The following options are available from the User menu on the right portion of the Main Menu bar.

End Current Session

This option signs the user out and opens the Web Console Sign in page.

My Console

These options provide users with functionality that supports the tasks they are authorized to perform. The options that a user has under My Console depend on the user role and general privileges assigned to the user.

In the descriptions that follow, each option applies to the user who is connected to the current Web Console session.
**Show My General Privileges.** Shows the privileges set by the Server Administrator for the user who is logged in to the current Web Console session. Privileges can be customized for each role, group, or user. See *General Privileges* on page 107, for details on the information supplied on the General Privileges pane.

**Change My Password.** Enables you to specify a new password to replace your current password. When you click this console option, the dialog box shown in the following image is displayed. Supply the requested information, and click *Update*.

![User Information Dialog Box](image-url)
Note: The LDAP security mode also allows you to change your password in the LDAP directory.

Manage My Agents. Enables you to monitor and manage Data Service Agents, based on your role and privileges. For example, if you are a Basic user, by default you can monitor and manage your own agents (that is, the agents that match your user ID). If granted the applicable privileges, you can also monitor, or monitor and manage, the agents of the other users in your group (that is, users with the same group ID).

When you click Manage My Agents, a Performance Report for Data Service Agents is displayed, showing statistics for the agents that you are authorized to see. You can customize and filter the report to display only those statistics that you are interested in.

To determine your privileges, click Show General Privileges from the Web Console menu bar. See General Privileges on page 107 for details on the information supplied on the General Privileges pane.

Save My Last Report. Saves the last report (procedure) that you ran with the values that you chose for the amper variables. The report is saved as a new, separate procedure. You can run the saved report without having to manually supply the values for the amper variables as you did before.

When you click this console option, you can select for the application directory in which to save the report and enter a file name for the report.

Edit My Profile. Enables you to make changes to your current user profile settings.
Login Info
This option displays user login status and browser-related information. Login status information includes user name, group, and role, location of all profiles (user, group, and role) if they exist, and type of authentication (explicit or cookie). HTTP information reflects the properties of the current browser session, for example, the cookie.

Clear Session Log
This option deletes all lines from the session log.

Session Log
This option opens the Session Log window, which provides a record of server configuration and activity.

Enable Traces
This option enables traces to provide diagnostics assistance. For more information, see Tracing Server Activity on page 656.

Export for Printing
If a report, such as a Data Services Agents report, is open in the Web Console, clicking this option opens the report in a web browser.
Preferences

This option enables you to indicate preferences for Run Options, Web Console Appearance, Reporting Options, and Diagnostic Options, as shown in the following image.

### Preferences

<table>
<thead>
<tr>
<th>Run Options</th>
<th>Web Console Appearance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default Data Service</td>
<td>Show Web Console reports in the following location.</td>
</tr>
<tr>
<td></td>
<td>Appearance</td>
</tr>
<tr>
<td></td>
<td>Icons</td>
</tr>
<tr>
<td></td>
<td>Report Style</td>
</tr>
<tr>
<td></td>
<td>Default page on User Login</td>
</tr>
<tr>
<td></td>
<td>Menu or Ribbon</td>
</tr>
<tr>
<td></td>
<td>Reporting Options</td>
</tr>
<tr>
<td></td>
<td>Diagnostic Options</td>
</tr>
</tbody>
</table>

**Run Options are:**

- **Default Data Service** The choices for Default Data Service are DEFAULT, WF_DEFAULT, SCHED_DEFAULT, and DFM_DEFAULT.

- **Maximum number of seconds before the popup timer appears**

**The Web Console Appearance options are:**

- **Show Web Console reports in the following location.** The choices are Right Frame, Same detached window, and Different detached window.

- **Appearance.** The choices are Adhere to server appearance default, RIA-Blue, RIA-CarbonRounded, RIA-Default, and RIA-OceanRounded.

- **Icons.** The choices are Adhere to server appearance default, IBI default, Google Material Icons.

- **Report Style.** The choices are Warm, Standard, and Flat.

- **Default page on User Login.** The choices are Applications, Adapters, Resource Management, Workspace/Monitor, Access Control, Scalability, and Upload Wizard.
Menu or Ribbon. The choices are Menu, Ribbon, and Adhere to server appearance default.

The Reporting Options are:

- **Maximum number of rows for test reports.** The default is 50.
- **Maximum number of columns for test reports.** The default is 999,999.
- **Maximum number of identical error messages.** The default is 10.

The Diagnostic Options are:

- **Enable recording for diagnostic.** The choices are Yes and No.

Indicate your preferences, and click Update.

Language

This option controls the language in which the Web Console is displayed. For example, all menu options are translated into the selected language. This console option is available if the server is configured for National Language Support (NLS).

Other Icon Options

The other icons at the top-right of the console provide the following options:

- **Show Ribbon**
  Shows the ribbon.

- **Hide Ribbon**
  Hides the ribbon.

Configuration Overview

The characteristics of an individual server are determined by a set of configuration files. These configuration files define the protocols, services, and data sources supported by the server. In the UNIX, z/OS HFS Deployment (USS), Windows, OpenVMS, and IBM i (formerly known as i5/OS) environments, these files are maintained in directories designated by the environment variable EDACONF.

The initial installation procedure creates an installation instance, represented as the logical name EDAHOME, and one default configuration instance, known as EDACONF. After you successfully install the server, you can configure a default configuration instance to create an operational instance, or create an additional one at your site. An operational instance of the server is one that is configured to support specific protocols, services, and access to data sources.
You must run the Installation/Configuration Utility for each new instance of the server that you want to configure, and then use the Web Console to configure all necessary functionality.

To configure a server instance, use the Web Console to:

1. Select and configure data adapters.
2. Optionally, configure remote servers.
3. Configure communications nodes and protocols.
4. Optionally, set parameters for deferred query processing.

If necessary, you may edit configuration files. Some configuration errors can make the server start in a limited mode called safe mode, in which the Web Console is still operational, to enable you to correct the errors.

Server Profiles

A server or global profile, edasprof.prf, is created during installation. You can customize this profile which is applied to all users. Optionally, you can create separate profiles to customize the server environment for a role, a group of users or an individual user. You can also create service profiles, which specify settings for the server environment. For information, see Profile Settings. Profiles are executed in the following sequence: server, service, role, group, and user.

A profile can include almost any command that a client application can send to the server, however, profiles are used most frequently for application set up commands, such as SETs, search path set up, and DBMS connection information, which may vary by adapter.

- For information about the syntax for commands typically used in profiles, see Profile Settings.
- For a description of the profile commands that are available for a particular adapter, go to the Adapter Administration manual. In the adapter chapter, look for topics on customization and optimization.
- For information about the relationship between profiles and security modes, see Security Providers on page 40.

Two key aspects of profile customization are level and associated search order. The server processes all profiles found in the search order. If it finds duplicate settings or commands, the last setting or command processed will be active for the connection.

When you create a profile, take into account that the more processing performed by the profile, the more time it takes for an application to connect to the server. An exception is pooled deployment, where only one profile is processed when the server agent initially starts or is refreshed.
Profile Level

The server supports various levels of profiles to provide flexibility for designing and running production applications. The order in which the following profiles are listed correlates with the search order in which they are processed by the server when multiple profiles exist.

- **Global profile.** The first level of profile, the global profile, is a startup file that is automatically created during installation and configuration of the server. It contains default environment settings required for the correct operation of the server.

  The global profile remains in effect throughout a user session. You can modify the global profile default settings. You can also add any commands or code that all connected users require before application processing begins.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>edasprof.prf</td>
</tr>
</tbody>
</table>
| Location       | UNIX: $EDACONF/etc directory  
                    Windows: $EDACONF\etc directory  
                    IBM i: IFS $EDACONF/etc directory  
                    OpenVMS: EDACONF [.ETC] directory |
| Override       | Set the environment variable EDASPROF to point to an alternate location of edasprof.prf (you cannot rename edasprof.prf). |
| Sequence in search order | First |
| Scope          | Applies to all connected users. |

- **Service profile.** A service profile specifies settings for the server environment, but the settings in this level of profile apply only to users associated with a specific service. When a user connects to the server, the service profile settings are applied and remain in effect throughout the user session.

  A service profile may contain settings that are the same as those in a global profile. You can specify a service profile in the Web Console by selecting **Workspace** from the menu bar. In the navigation pane, right-click the **Workspace** folder, and select **Settings**, and then **Profile Settings**.
You can create a service profile from the Workspace folder. Expand the Configuration Files folder in the navigation pane. Right-click Server Profiles and select Edit. You can also use any standard system editor. If you use an editor, create the service profile in the correct location.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>name.fex</td>
</tr>
<tr>
<td>Location</td>
<td>Follows the normal search path for procedures (focexecs).</td>
</tr>
<tr>
<td>Override</td>
<td>None</td>
</tr>
<tr>
<td>Sequence in search order</td>
<td>Second</td>
</tr>
<tr>
<td>Scope</td>
<td>Applies to all users of the same service.</td>
</tr>
</tbody>
</table>

- **Role profile.** A role profile specifies settings for the server environment, but the settings in this level of profile apply only to users assigned to a specific role. When a user connects to the server, the role profile settings are applied and remain in effect throughout the user session.

- **Group profile.** A group profile specifies settings for the server environment, but the settings in this level of profile apply only to users associated with a specific security group. When a user connects to the server, the group profile settings are applied and remain in effect throughout the user session.

A group profile may contain settings that are the same as those in a global profile.

Server Administrators need to register group profiles and users to give them privileges that are different from those they inherit from their default role. Group profiles are used to set DBMS connections, variables, and other settings that should be executed for group users when they connect.

If you use an editor, create the group profile in the correct location.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>group_name.prf</td>
</tr>
<tr>
<td>Characteristic</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Location                      | UNIX: `base_directory_name/ibi/profiles`  
Windows: `base_directory_name\ibi\profiles`  
IBM i: IFS `base_directory_name/ibi/profiles` directory  
OpenVMS: `base_directory_name [.IBI.PROFILES]` directory |
| Override                      | Set the `edaserve.cfg` keyword `edaprfu` to point to an alternate location of `group_name.prf`.                                              |
| Sequence in search order      | Third                                                                                                                                       |
| Scope                         | Applies to all users of the same security group.                                                                                           |

**User profile.** A user profile specifies settings for the server environment, but the settings in this level of profile apply only to a specific user ID. When a user connects to the server, the user profile settings are applied and remain in effect throughout the user session.

A user profile may contain settings that are the same as those in a global profile.

**Procedure:** How to Create a User, Group, or Role Profile

You can create a user profile at any time as by:

1. From the menu bar, select *Workspace*.
2. Expand the *Configuration Files* folder in the navigation pane.
3. Right-click the *User/Group Profiles* folder, and select *New Profile*.
   
   The Edit New Profile page opens.
4. Enter the profile parameters and click the Save As button.

The *Create New User/Group Profile* page opens.
5. Enter a profile name and click Save.
   You can also use any standard system editor. If you use an editor, create the profile in the correct location.

<table>
<thead>
<tr>
<th>Characteristic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>user_id.prf, group_id.prf, or role_id.prf.</td>
</tr>
<tr>
<td>Location</td>
<td>UNIX: base_directory_name/ibi/profiles</td>
</tr>
<tr>
<td></td>
<td>Windows: base_directory_name\ibi\profiles</td>
</tr>
<tr>
<td></td>
<td>IBM i: IFS base_directory_name/ibi/profiles directory</td>
</tr>
<tr>
<td></td>
<td>OpenVMS: base_directory_name [.IBI.PROFILES] directory</td>
</tr>
<tr>
<td>Override</td>
<td>Set the edaserve.cfg keyword edaprfu to point to an alternate location of user_id.prf.</td>
</tr>
<tr>
<td>Sequence in search order</td>
<td>Depends on which type of profile and how many other profiles apply to the same user, group, or role.</td>
</tr>
<tr>
<td>Scope</td>
<td>Applies to a specific user, group, or role.</td>
</tr>
</tbody>
</table>

**Profile Commands**

The following topics describe commands that you can include in any of the supported server profiles. These commands affect the behavior of the server for the duration of the connected session. You can code additional commands, such as data access commands, in any of the supported server profiles. For more information, see specific adapter topics in the online help.

For more information on the server profile commands, launch the online help using the adjacent question mark (?) icons in the Web Console.

**Profile Command Formats**

Each server command takes one of three possible formats. The syntax and an example of these formats follow. Ensure that you use the correct format for any server command you use.

**Syntax:** How to Use a Direct SET Command

To use a direct SET command

```
SET command=value
```
where:

command

Is the server command.

value

Is the value selected from the available choices.

**Example:** Using a Direct SET Command

```
SET SQLENGINE=DB2
```

**Syntax:** How to Use an SQL Engine SET Command

To use the SQL Engine SET command

```
ENGINE sqlengine SET command value
```

where:

sqlengine

Is the target DBMS. You can omit this parameter value if you previously issued the SET SQLENGINE command.

command

Is the server command.

value

Is the value selected from the available choices.

**Example:** Using an SQL Engine SET Command

```
ENGINE SQLORA SET OWNERID EDAUSER
```

**Syntax:** How to Use an SQL Translator Command

To use an SQL Translator command

```
SQL
SET command=value
END
```

where:

command

Is the SQL Translator command.
value

Is the value selected from the available choices.

Example:  Using an SQL Translator Command

```
SQL
SET APT=OFF
END
```
Server Security

This chapter describes the security providers that can be configured on a server. It also describes how an administrator enables a particular security provider and assigns privileges to users and groups.

In this chapter:

- Server Security Overview
- Configuring Authentication
- Configuring Privileges and Other Authorizations
- Configuring Server Encryption
- Access to Connection Information in WebFOCUS Procedures
- Configuring the Server for Multi-Tenant Deployment

Server Security Overview

Server security is based on a three step process: authenticating the connecting user, establishing his/her group and role, and then assigning privileges and other authorizations based on the user, group, and role.

Note: NLS characters are supported for user ID, group name, password, and domain name on the Web Console Access Control configuration pages.

The Access Control page on the Web Console provides a server administrator with the tools needed to manage server security. Using ribbon buttons and right-click options, the server administrator can perform the following security operations:

- Manage security providers.
- Edit Access Control and Encryption settings.
- Filter the Access Control tree display.
- Register users, groups, and roles.
- Show privileges for specific users, groups, and roles.
Generate a report listing System and Security functions with their parameters and descriptions.

Authentication

Authentication can be performed based on the following types of credentials:

- **Explicit.** User ID and password are supplied when signing in to the server.
- **SSO (Single sign on).** The user is authenticated by a single sign on product prior to signing in to the server, and a token is passed to the server. Single sign on products include Kerberos, NTLM tickets or browser cookies such as passed by MYSAPSSO2.
- **Trusted.** The user ID is submitted without the password from the application server or mid-tier, which has the user already authenticated.

Security Providers

A security provider is used to authenticate the incoming connection. When a security provider is configured, it is added to edaserve.cfg as a security provider block. Multiple active security providers can be configured, in which case the security_provider attribute will consist of a comma-separated list of security providers. The first one on the list is the primary provider.

The security provider can be of several types:

- **OPSYS.** Users are authenticated against the native OS security repository, such as the windows domain controller, z/OS RACF/ACF2, UNIX password files or other operating system security products using the native OS API.
- **LDAP.** Users are authenticated against an LDAP server or active directory using the LDAP API.
- **DBMS.** Users are authenticated by connecting to a DBMS such as Oracle, SAP, or Db2.
- **PTH.** Users are authenticated against a list of users kept internally by the server in the admin.cfg configuration file.
- **CUSTOM.** Users are authenticated using a custom procedure.

After the server is installed, the default security provider configured by the installation process is the PTH (server internal) provider. This provider keeps a list of groups and group membership in the admin.cfg file. During installation of the server, a server administrator user ID is created in admin.cfg. The installer can accept the default user ID (srvadmin) or change it, but the installer must provide a password for this ID.
The server administrator can choose whether to register users and groups for the primary security provider with one-part or two-part names. With two-part names, the user ID or group name is prepended with the provider name and a backslash. For example:

OPSYS\user1

or

LDAP01\user2

By default, all users and groups are registered using two-part names. For the primary provider, you can configure one-part names. Secondary provider registrations always use two-part names. To configure one-part registrations for the primary security provider:

1. On the Access Control tab, click Settings and then Access Control Settings on the ribbon, or right-click the Access Control tree and select Settings and then Access Control Settings from the context menu.

2. Select n from the prepend_provider_name drop-down list in the General section of the page, as shown in the following image.
3. Click *Apply and Restart Server*.

The `prepend_provider_name=n` attribute is added to the edaserve.cfg file.

If the server administrator did not configure one-part names for the primary security provider, the user ID will be created as a two-part name in the form `security_provider\user_ID`, for example, `PTH\srvadmin`.

When the server starts with security PTH, the `PTH\srvadmin` user ID (or the one configured during installation) is the server administrator user that is used to connect to the Server Web Console, and that user can make additional security changes to the server, such as adding and changing active security providers and changing access control privileges for users, groups, and roles. We recommend that you keep the PTH provider as an active security provider, so user `PTH\srvadmin` can be used as a backup Server Administrator.
All new security subjects for all security providers (except for the primary provider, if one-part names were configured) will be registered with a two-part name, provider\userid or provider\groupid. For example, the following group named grp1 is registered under the LDAP1 security provider:

LDAP1\grp1

The following user, whose ID is user1, is registered under OPSYS security in the IBI domain:

OPSYS\IBI\user1

If one-part name registrations exist from a prior release, they are respected and are assumed to be primary provider registrations.

**Note:** If the silent installation is used, the server administrator user ID with its associated password needs to be provided. If none is provided, the default user ID PTH\srvadmin with the password `srvadmin` will be configured.

OPSYS security has specific operating requirements in order to be activated. For details, see *Configuring OPSYS Authentication* on page 51.

If you want to use an OPSYS, LDAP, DBMS, or CUSTOM security provider, you must configure it on the Web Console Access Control page. When you configure one of these security providers, the server edits the edaserve.cfg file to add a block for the new security provider. You can then use the Web Console to change to this provider. In response, the server sets the security_provider attribute in edaserve.cfg to this provider name, after which this provider is considered the primary provider and defines the security used by the server.

You can configure multiple security providers, and the server will add multiple provider blocks in edaserve.cfg. When multiple providers are chosen to be active, the security_provider attribute in edaserve.cfg is set to the list of active providers. In this case, the first provider on the list is considered to be the primary provider and defines the security used by the server.

**Note:** In order for a signed-in user to start or manage a server using the edastart command script, the signed-in user ID has to be registered as a server administrator in admin.cfg, even if OPSYS is not an active security provider. This is required in order to protect the server from unauthorized actions by users who can sign in to the system where the server resides. If one of the active providers is OPSYS, the server must be authorized to run security OPSYS and it will start with security OPSYS.
EDAEXTSEC can be set to OFF in order to override the security provider set in the security_provider keyword of edaserve.cfg and start the server with security OFF. For information on setting EDAEXTSEC in different operating environments, see Platform-Specific Methods for Specifying EDAEXTSEC on page 709.

An example of configuring multiple providers is having two distinct LDAP providers configured against two separate LDAP servers that can contain different users and different groups.

One provider is considered the primary provider. For all providers, the user name is a two-part name prefixed with the provider name, for example LDAP1\usera. Note that users (or groups) from two providers that have identical names (such as LDAP1\usera and LDAP2\usera) are considered different security subjects and can be given different privileges and profiles.

At sign-in time, a user needs to select the security provider name in addition to user ID and password. If a user signs in to the server using the primary provider, the server will automatically prepend the user ID with the provider name, if the user does not supply a two-part name.

OPSYS providers can be configured with other security providers. On Windows, multiple Windows domains act as different security providers and users. For example, domain1\usera and domain2\usera are not identical.

Privileges and Other Authorizations

The server supports a large number of objects, and access to them should normally be restricted.

DBMS

With DBMS authorization, the main object to be protected is the DBMS-resident data that the server reads and writes. Access control is implemented using ENGINE CONNECTION_ATTRIBUTES statements that define the security attributes that are used by the server agent for connecting to the DBMS. The connection security type depends on the DBMS and can be one of three subtypes:

- **Explicit.** The userid/password is stored in a profile (encrypted).

- **Password pass-through.** The userid/password combination or cookie, such as MYSAPSSO2, that were provided during the connection to the server is passed to the DBMS connection.

- **Trusted.** This type of connection applies to security provider OPSYS where the operating system process of the agent impersonates the user, and the DBMS connection is derived from that process.
The CONNECTION_ATTRIBUTES statement itself can be defined in the user, group, role or server profile, and they override each other in this order.

It is common initially to create connections in the edasprof server profile. They will then be inherited by all users. Subsequent configuration steps may define connections on other levels, such as the group or user level.

The CONNECTION_ATTRIBUTES statement in effect passes the credentials to the DBMS, and the DBMS server ensures the correct access control: read and read/write rules on the DBMS tables, views, columns, and rows.

Server DBA
The server engine can add an additional level of access control by defining DBA rules in synonyms to restrict access to columns and certain data values. This applies only to data access using the WebFOCUS language, and not to Direct SQL Passthru requests. For more information about Server DBA, see the Describing Data With WebFOCUS Language manual.

Data and Application Folder Access
The server reads operating system files using standard I/O calls.

With the OPSYS security provider, the proper OS read/write privileges should be given using native OS tools such as RACF rules or Windows/UNIX permissions. Run-time access control is achieved by the operating system validating the data agent access to any given file based on the agent process impersonation of the connecting user.

To protect files in other modes (LDAP, PTH, DBMS), the server access control feature should be used to assign read/write privileges to OS files and folders. The privileges are managed from the Web Console Access Control page and stored in the server admin.cfg file. They can be assigned at the role, group, and user levels and be allotted on the folder and file levels. Normal inheritance rules apply. A subfolder inherits from its parent folder, a file inherits from its parent folder, a user inherits from the group, and so on.

Note that this protection applies to WebFOCUS metadata objects in application folders such as synonyms, FOCEXECs, HTML files, style files, and to data files such FOCUS data sources and sequential files.

Application folders and files can have four types of privileges, read, write, execute, and list. For data files such as FTM files, only two privileges are used: read and write.

You can disable operating system shell commands using the SET OPSYSCMD or the NOSYS general privilege, You may want to consider disabling these commands as they are not subject to access control.
**General Server and Web Console Actions**

The Web Console provides various actions, such as adapter configuration, server configuration and monitoring, Resource Analyzer configuration, metadata creation, and other actions, such as the ability to issue Direct SQL Passthru requests. To manage access to these actions, the server administrator uses the server access control feature to assign general privileges to users, groups, and roles.

**Groups**

Groups are collections of users typically defined by the security provider for the purpose of giving common authorization to multiple instead of individual users. Groups are defined either on an external repository such as RACF, LDAP, or internal PTH. The DBMS security provider does not support groups. Except for PTH, user provisioning and all associated administration tasks (such as password reset, invalidating users, volume user creation) are accomplished using the respective security provider software and are outside of the reporting server software.

**Roles**

Roles are a collections of privileges defined on the server for the purpose of registering groups and users to the collection (as opposed to assigning privileges to individual users). Five predefined user roles (Server Administrator, Application Administrator, Operator, Basic, and None) are created at server installation time. For example, the Server Administrator role has all privileges, and the Application Administrator role has privileges related to the creation of applications, such as creating synonyms and related tasks.

New roles can be added and existing roles can be modified to include and exclude individual privileges.

New installations are done with no access to files and directories outside of the server installation, and with no privilege to run operating system commands and direct SQL requests to a DBMS, for all roles except Server Administrators. All users have full access to all applications under APPROOT.

**Registering Users and Groups Under Roles**

When the server is installed, the user ID specified as the server administrator is automatically registered as Server Administrator. All other users and groups are defaulted to the server default role—Basic.

Note that no group, user, or role profile exists initially after the installation. It is typical at the initial stage to have the DBMS connections defined in the server profile, edasprof. Privileges are derived from the Basic role and are in effect for all users except the Server Administrator.
Recommended steps for securing the server:

- Review default privileges for role Basic and change them if necessary. You can change the default role to another role.

- Review and change the file privileges for the default role at the file root level.

- **Customize groups:**
  
  - Register groups to roles. For example, register LDAP group GRP1 to the Application Administrator role.

  - Create group profiles with DBMS connections and APP PATH. For example, for group GPR1, create grp1.prf (through the Web Console Adapter page or the application path configuration).

  - Customize application level file privileges for groups. For example, group GRP1 can have read but not write access to baseapp.

- **Optional steps:**

  - Create new roles or customize the role privilege list. This should be done only if existing roles are not satisfactory. It allows registering groups to these roles.

  - Register users. This should be done only if groups are not created adequately, and for special users such as managers.

  - Register file privileges on the file level. This should be avoided in favor of folder level privileges, as they are inherited by files and are easier to manage.

Registration of Users and Groups for inactive Security Providers

From the Access Control page, the server administrator can register users and groups in server roles for a security provider that is not currently activated. These registrations will be available when the server is started with security ON and with that provider activated.

In addition, a server running with security OFF has an Access Control page that a server administrator can use to register users and groups and to activate and deactivate providers.

One use for this feature is to register a Server Administrator for a Provider that will be active after the next server restart.
Encryption

Using the Web Console, you can encrypt passwords in configuration files, enable Secure Socket Layer (SSL) encryption for the TCP/HTTP listener, and encrypt data passed between the server and a remote server. For more information about encrypting communication between the server and the WebFOCUS Client, see the WebFOCUS Security and Administration Manual.

Configuring Authentication

Authentication is the process of validating user credentials. Individuals who use WebFOCUS may have user IDs and passwords managed by other systems. WebFOCUS Managed Reporting and the Reporting Server can each be configured to authenticate users to an external security system, or to trust that authentication has already taken place. Users benefit because they do not have to sign in multiple times or manage separate user ID/password combinations. If a user signs in to WebFOCUS with credentials from an outside security package, the package provides some type of authentication confirmation to the WebFOCUS Client or the Reporting Server. This information may be in the form of a browser cookie or a logon ticket and may be needed by the Reporting Server in order for it to access and retrieve the data required by the WebFOCUS application.

Depending on your operating environment, user credentials can be validated by:

- The operating system on which the server is running (OPSYS security).
- A list of users stored in the server file named admin.cfg (PTH security).
- An LDAP or Active Directory repository (LDAP security).
- A DBMS (DBMS security).
- A custom user-supplied procedure (CUSTOM security).

Multiple security providers can be configured. You can configure additional providers using the Web Console Access Control page.

Configuring a New Security Provider

Security providers must be configured from the Web Console Access Control page.

To switch to security provider LDAP, DBMS, or CUSTOM, you first need to add a new provider under the appropriate security provider on the Access Control tree. When you add a new provider, the server updates configuration file edaserve.cfg with provider blocks named LDAP_PROVIDER, DBMS_PROVIDER, or CUSTOM_PROVIDER. These blocks are inserted with all attributes that apply to the provider type between BEGIN and END dividers.
Security provider PTH is configured during installation of the server and is the default security provider when a newly installed server is started. A server administrator can configure and activate other security providers.

The OPSYS security provider is always on the list of providers. In order to make it an active provider, the server must be authorized (privileged) to start with security OPSYS. There is no need for the additional step of creating a new provider as is needed for LDAP, DBMS, and CUSTOM providers. By default, the effective server administrator ID shown on the Activate Providers page is the server administrator ID. You can change this using the Access Control Settings page. Once the server is installed, you can start adding new PTH users and PTH groups, and you can assign PTH users to PTH groups.

Security provider CUSTOM supports using non-standard security storage. You can create DBMS tables to store users, groups, and passwords. You must then write procedures to read these tables and perform the basic security tasks. This security mechanism has to be created prior to configuring the CUSTOM security provider and must be available when the CUSTOM provider is added to the server provider configuration. It must perform the following standard security tasks:

- Retrieve the user ID and its password to authenticate the user on connecting to the server.
- Retrieve the list of users and groups on user and group registration.
- Retrieve the list of users in each group.
- Retrieve user membership in all available groups.

Once the provider is added, you can change security providers from the Access Control page. Right-click the Security Providers folder and select Activate Providers to switch to a newly added provider. At this point, edaserve.cfg is updated with the security_provider attribute that specifies the provider name.

Multiple security providers can be configured. When you configure OPSYS as one of multiple security providers:

- The server has to be authorized to run security OPSYS, and it needs to have a valid OS user ID and password for starting an agent.
- In a multi-provider security environment that includes an OPSYS security provider, other provider names should not match any domain name reachable by the OPSYS provider.
The Access Control Settings page lets you enter valid OS credentials.

When you configure multiple providers, you choose one to be primary on the Access Control Activate Providers page. Drop-down lists are available for assigning the other providers as secondary providers or inactive. The primary provider defines the security under which the server is running:

During connection to the server, all provider users are connected with a two-part user ID consisting of the provider name and the user ID, for example, MyLDAP\User1 or MyDBMS \User2, where MyLDAP or MyDBMS is the name of a configured secondary provider.

This naming convention is also used when users and groups are registered to server roles. Users and groups are registered with a two-part name. If the PTH provider is a secondary provider, PTH users and groups are registered (and used on connection) as PTH\userid and PTH\groupid.

**Example:**  **Security Provider Blocks in edaserve.cfg**

The following is an example of a security_provider attribute and security provider block for starting the server with security LDAP (provider name MyLDAP):

```plaintext
security_provider = MyLDAP
LDAP_PROVIDER = MyLDAP
BEGIN
  ldap_host = ldaphost
  ldap_port = post
  ldap_secure_connection = n
  ldap_user_base = dc=ibi,dc=com
  ldap_user_scope = subtree
  ldap_user_class = person
  ldap_user_attribute = uid
  ...
END
```
The following is an example of a security_provider attribute and security provider block for starting the server with security DBMS (provider name MyDBMS):

```
security_provider = MyDBMS
DBMS_PROVIDER = MyDBMS
BEGIN
  security_dbms = MSSQL
  security_connection = CON01
END
```

### Configuring OPSYS Authentication

When security provider OPSYS is configured, the user credentials from the client connection are authenticated by the native security system of the operating system. The server then allocates a data access agent that impersonates the user so that access to files or other objects is controlled by the native system.

Profiles for operating-system users are supported on all platforms. On Windows, Active Directory groups are supported based on the win_primgroup_adsi setting.

Details about OPSYS security requirements are provided in the Server Installation manual, where specific sections are provided for each platform. Refer to this manual for installation instructions and platform-specific setup steps. The following is a summary of the OPSYS requirements:

- **On UNIX**, the startup tscom300 executable must have root setuid authority.

- **On Windows**, the server must be started as a service under SYSTEM account (Administrators Group authority) or as a user ID with Windows Administrator authority.

  On Windows, the Server Administrator password is required for this security provider. If the password is not provided in the configuration, the server starts in safe mode and displays a message to that effect. Multiple administrators are allowed. For more information on creating server administrators and other roles, see *Registering Users and Groups in a Role* on page 117.

- **On z/OS**, the MVS load library must be APF-authorized, and for HFS deployment, certain HFS executables must be given +a authorization.

- **On IBM i** (formerly known as i5/OS), the ownership of certain library files must be changed to have QSECOFR ownership and, therefore, authority.

- **On OpenVMS**, the account starting the server must have a specific set of privileges to have proper authorities.
Note that some system specific settings in the edaserve.cfg file are provided to allow further adjustments of the authentication mechanism. Those relevant for some UNIX systems are:

- **require_logon_privilege** (AIX only. Allows no sign-in IDs to access the server.)
- **update_security_db** (AIX and HP-UX only. Registers failed sign-in attempts.)

For Windows systems, the **logon_method** setting (for interactive, network, or batch) is relevant to explicit connections.

**Note:** For more information on limiting user access to the Web Console, see *Configuring General Server and Web Console Actions* on page 106.

**Procedure:** How to Change the Impersonation User ID

When you first add an OPSYS security provider to the list of non-OPSYS providers, the impersonation ID that would be used for non-OPSYS connections to the server is created by copying the effective server administrator ID.

When using an OPSYS security provider, all requests to the server must be associated with a user ID that can be authenticated by the server operating system. Not all users who connect to the server have such user IDs. If you need to change the impersonation ID to provide an OPSYS user ID to be used to impersonate agents on non_OPSYS connections to the server, do the following.

1. Sign in to the server with Server Administrator privileges.
2. Go to the Access Control page.
3. Right-click the Access Control tree and select **Settings** from the context menu, or click **Settings** on the ribbon.
   
   The Access Control Settings page opens.

   ![Operating System Impersonation ID](image)

   - **Operating System Impersonation ID**
   - **osys_userid**
   - **osys_password**
   - **confirm password**

4. Enter the user ID and password for the impersonation ID in the appropriate fields.
5. Click **Apply and Restart Server**.
**Procedure:** **How to Enable Primary Group Support for Windows Active Directory**

When the Reporting Server runs on the Windows platform configured for an OPSYS security provider against an Active Directory, you can set the `win_primgroup_adsi` keyword to support Active Directory primary group notation. When you set the parameter to y, the server uses the primary group of the user as the name for the group profile and for some access controls under the Web Console. (Note that you can only set the primary group from Windows Active Directory interface to Users management.) In order to take advantage of this setting, you must ensure that the Windows machine that hosts the server resides in the same domain as the Active Directory.

1. Access the Web Console with a server administrator user ID.
2. Click Access Control.
   
   The Access Control page opens.
3. Open the Security Providers folder in the navigation pane.
4. Right-click OPSYS and select Properties.
   
   The OPSYS Security Configuration page opens.
5. Select y from the `win_primgroup_adsi` drop-down menu.
6. Click Save.

**Procedure:** **How to Configure an OPSYS Security Provider**

This procedure assumes that the server is already running configured for a non-OPSYS security provider.

1. Access the Web Console with a server administrator user ID.
2. Click Access Control.
   
   The Access Control page opens.
The server security provider is displayed on the Access Control page.

3. Right-click the Access Control folder in the navigation pane, and select Activate Providers.

The Activate Providers page opens.

![Activate Providers](image)

**Note:** For more information about changing security providers, see *Considerations for Changing the List of Security Providers From the Web Console* on page 87.

4. Click Save.

**Note:** If you change the privileges of tscom300, the server will start with security OPSYS by default. For more information, see the *Server Installation* manual.

5. **For z/OS Unified Server only.** Starting with z/OS 1.7, the z/OS security package provides extended password support. If this option is enabled, you must add `mixed_case_password=on` to the edaserve configuration file before starting the server in configured for an OPSYS security provider. For HFS deployment, this file is in `$EDACONF/etc` and for PDS deployment it is in `qualif.servertype.CONF.CFG`, where `servertype` is determined by your license key.

6. If the server is not running, start it using the instructions for your platform in the installation guide.

   The server will start configured for an OPSYS security provider.

7. Examine the edaprint.log file. If it indicates errors, stop the server, correct the errors, then start it with security OPSYS.

8. Restart your browser and connect to the Web Console. When prompted, enter a valid operating system user ID and password.

If you wish to register other users in a role or group or create new roles, first connect as a Server Administrator. Then, follow the instructions in *Registering Users and Groups in a Role* on page 117.
Preventing Unsecured Server Starts After Upgrades

If the environment variable EDAEXTSEC is explicitly set to OPSYS, and the server fails to start because it lacks system privileges to start configured for an OPSYS security provider, the server start aborts and error messages are written to the edaprint log file.

This feature prevents an unsecured server start after a software upgrade if any of the required post-upgrade reauthorization steps are missed on a UNIX, IBM i, or z/OS HFS deployment. This is not applicable to other platforms. The setting may be placed in any normal server start-up shell or profile that a site is using or in the server edaenv.cfg configuration file. The messages vary slightly by platform.

The edaprint messages are:

- Configured security is 'ON' as set by EDAEXTSEC variable.
- Server has no root privilege. (UNIX)
- Server is not APF-authorized. (z/OS HFS)
- TSCOM300.PGM has no QSECOFR authority. (IBM i)
- Workspace initialization aborted.
- (EDA13171) UNABLE TO START SERVER

Using Password Phrases for Authentication on z/OS

Starting with z/OS 1.8, IBM introduced password phrases which can be used for authentication, and starting with z/OS 1.10 password phrases can be used for TSO Logon as well. Password phrases can be from 14 to 100 characters long.

z/OS IDs can have both a password (1 to 8 bytes) and a passphrase (from 14 to 100 bytes). The two forms of credentials are independent. Changing one does not change the other. The server recognizes the type of credential being presented by its size (sizes between 9 and 13 are invalid on z/OS).

No special configuration is needed to enable password phrases.

When a user logs into the Web Console, there are two possible ways they can change their passwords or passphrases:

- On the initial Web Console Logon page. This option is disabled by default. For more information on enabling this option, see How to Change Passwords on the Web Console Logon Screen on page 56.
After the initial logon, by choosing Change Password on the My Console menu. A new screen opens with three separated fields (old password, new password, and confirm new password).

**Procedure: How to Change Passwords on the Web Console Logon Screen**

By default, passwords cannot be changed on the Web Console Logon page because the following parameter is in effect:

```
password_change_wclogin = n
```

To enable the option to change passwords when logging into the Web Console:

1. Select Access Control from the Web Console menu bar.
2. Right-click Access Control on the tree and select Settings from the context menu.
3. Change the value of the password_change_wclogin parameter to y.

On the same configuration page, you can change the delimiter used to separate the user ID from the password or passphrase to any valid character accepted by the operating system. By default, the delimiter is a comma:

```
password_change_delimiter= ,
```

Once the option to change passwords on the Web Console Logon page is enabled, users can change their passwords or passphrases by entering the following in the password field of the Web Console Logon page (if the password delimiter has been changed, use that character between the old and new passwords instead of the comma):

```
old_password,new_password
```

When password_change_wclogin = y, passwords and passphrases cannot contain the password delimiter character.

When password_change_wclogin = n (the default), the setting for password_change_delimiter is ignored, and passwords can contain all valid characters allowed by the operating system.

**Configuring Linux and AIX Pluggable Authentication Modules (PAMs)**

In a Linux or AIX environment, OPSYS security can be configured to use Pluggable Authentication Modules.

**Procedure: How to Configure PAM Security on Linux and AIX**


   The Access Control Page opens.
2. Right-click the OPSYS security provider and select Properties from the context menu.

3. Select y from the security_pam drop-down list.

   This parameter is only applicable for the Linux and AIX operating systems. The parameter defines if the server uses the Pluggable Authentication Modules mechanism to implement security. If y, the server uses PAM calls, if n the server uses native UNIX security calls.

4. Click Save and Restart Server.

**Using Kerberos for Single Sign-On on Linux**

A server started with security provider OPSYS can be configured for Kerberos connections.

To implement the single sign on Kerberos security:

1. On the Access Control page, right-click the OPSYS provider, and select Properties from the context menu.

   The OPSYS Security Configuration page opens.

2. In the krb5_srv_principal * field, enter your server principal used for Kerberos security.

3. Click Save.

   The edaserve.cfg file is updated with this attribute.

4. On the Workspace page, expand the Special Services and Listeners folder, right-click TCP/HTTP, and select Properties of TCP.

5. Check SECURITY=KERBEROS.

6. Click Save and Restart Listener.

   The odin.cfg file is updated with this attribute.

When the server is started, a user can connect to the Web Console from Internet Explorer without a prompt for user ID and password. The Login Info shows connection type Kerberos. The connection is done using the Kerberos ticket from the browser. The connected user ID is derived from this ticket.

Connection to the server requires that there is a local OPSYS user ID with the same name as the Kerberos user ID on the operating system running the server. This user ID is used for tscom3 process impersonation.

If a user signs off from the Kerberos connection, the user can make explicit connections with the local Unix user ID and password. Connection with another Kerberos user ID as an explicit connection will not work.
Configuring PTH Authentication

By default, the server installation process establishes PTH security with a PTH server administrator user ID and password. If you deleted the PTH server administrator ID, you can reconfigure PTH security.

The PTH security provider only controls access to the Web Console. When the server is configured for this security provider, there is no impersonation by data agents or authentication of a non-Web Console connected user. From the operating system point of view, all server processes run as a single user ID, and access to the Web Console is controlled by authenticating names against those defined in the admin.cfg file unless authenticate_all_pthuser is set to y. The setting is available on the PTH Security Configuration page, which can be accessed by right-clicking PTH in the Security Providers folder on the Access Control navigation pane.

You must configure the Server Administrator password before starting a server configured for a PTH security provider, either by providing it at installation time or by configuring it in the Web Console. For details, see Registering Users and Groups in a Role on page 117.

The PTH security provider supports profiles for users and groups on all platforms.

**Note:** For more information on limiting user access to the Web Console, see Configuring General Server and Web Console Actions on page 106.

**Procedure:** How to Configure a PTH Security Provider

2. Right-click the Access Control folder, and select Activate Providers.
   The Activate Providers page opens.
3. Select the PTH drop-down list, and select Primary or Secondary. from the list of providers in the last Security Provider drop-down box and enter a Server Administrator ID and Password.
4. Click Save.
   Once the server has restarted, the PTH security provider has icons for adding and viewing its users and groups.
5. If the server is not running, start it using the instructions for your platform.
   The server will start configured for a PTH security provider.
6. Examine the edaprint.log file. If it indicates errors, stop the server, then start it with security OFF to correct the errors.
7. Restart your browser and connect to the Web Console. When prompted, enter a valid PTH user ID and password.
If you wish to add other PTH users, first connect as a PTH user defined as server administrator. Then, follow the instructions in *How to Manage Users and Groups With PTH Security* on page 122.

**Note:** A common problem when switching from OPSYS to PTH is the existence of files in EDATEMP that cannot be removed due to insufficient privileges. To handle this problem, use edastart -cleardir (or member ICLRDIR on the z/OS platform) using an OPSYS security provider to clear the directory before switching.

**Procedure:** How to Encrypt the admin.cfg File

The admin.cfg file contains the users and groups registered for the internal server security (PTH). To encrypt this file, do the following.

1. Connect to the Web Console as a Server Administrator.
2. On the Access Control page ribbon, click **Settings** and select **Encryption Settings**.
3. Select **y** from the encrypt_admincfg drop-down list.
4. Click **Apply and Restart Server**.

When the server restarts, admin.cfg will be encrypted.

**Configuring Password Properties for a PTH Security Provider**

When the Server Administrator creates or updates a user under a PTH security provider, by default the password never expires, can be any length, and are not case-sensitive.

The Server Administrator can configure a new or existing user password to expire after a specified number of days, can set a minimum length for passwords, can enable case-sensitive passwords, and set other password properties.

**Procedure:** How to Configure Password Properties for a PTH Security Provider

1. To assign an expiring password, select **Access Control**.
   a. Right-click **PTH** and select **Manage Users/Groups**.
      The **PTH Users and Groups Management** page opens.
   b. If the user does not yet exist, create the user. Then, click **Properties** on the menu bar.
      By default, the **Password never expires** box is checked.
c. Uncheck the *Password never expires* box.

When the password expires, the user gets a *password expired* message on the logon screen and is provided with a *New Password* field in order to enter a new password.

At this time, the new password and new password change date are recorded in `admin.cfg`.

Note that changing the password by selecting *Change Password* from the *My Console* menu also resets the password change date.

d. Click *OK*. 
The current date is saved in \texttt{admin.cfg} as \texttt{admin\_passdate} for this user. This is the last password change date.

e. Click Save.

f. Optionally, configure a warning message to begin displaying a specified number of days before the password expires, as described in \textit{Sign-in Password Expiration Warning} on page 91.

2. To configure other password properties:

a. Right-click the PTH Security Provider and select \textit{Properties}.

The \textit{Security Configuration PTH} page opens

![Security Configuration PTH](image)

b. Set the following properties.

- **\texttt{security\_scope.}** Valid values are ALL (the default) and WC. When ALL is selected, authentication is enabled in both the Web Console and data service access. When WC is selected, authentication is enabled only for Web Console access.

- **\texttt{authenticate\_all\_pthuser.}** Valid values are \texttt{y} and \texttt{n}. Defines whether the server will authenticate all connections, including Basic Users, to the Web Console. The default value is \texttt{y}.

- **\texttt{pthpass\_casesensitive.}** Valid values are \texttt{y} and \texttt{n}. Defines whether authentication of passwords will be case sensitive. The default value is \texttt{n}.
- **pthpass_mixedchars.** Valid values are y and n. Defines what characters should be required in a password. If the value is y, a password must contain at least one special character, one numeric character, and one letter (one uppercase and one lowercase letter, if pthpass_casesensitive is set to y). The default value is n.

- **pthpass_lifetime.** Defines the maximum password lifetime in days. Zero (0) means no expiration. The default is 60.

- **pthpass_length.** Defines the minimum number of characters that must be present in a password. Zero (0) means no minimum requirement. Zero is the default value.

- **pthpass_unique.** Defines the number of password cycles during which a password cannot be reused. The value zero (0) means passwords can be reused. Zero is the default value.

- **pthpass_lockout.** Defines the number of failed sign-in attempts that will cause a user account to be locked. The value zero (0) means no limit. Zero is the default value.

- **pthpass_lockout_duration.** Defines the number of minutes that a locked-out account remains locked out before automatically becoming unlocked. The value zero (0) means that the account will be locked out until an administrator explicitly unlocks it. Zero is the default value.

- **trust_ext.** Valid values are y and n. Specifies whether the server should accept trusted client connections. If there are multiple security providers, some may allow trusted connections and some may not. In these cases, if the trusted connection is made using a provider without the ability to accept trusted connections, the user will get an authentication error. The default is y for security OPSYS (except Windows security OPSYS), n for Windows security OPSYS and all other security providers.

  c. Click **Save and Restart Server**.

### Disabling a PTH Security Provider Account

You can disable an account that is registered in admin.cfg under the PTH security provider in order to prevent a user from signing in to the server with that account.

To disable a PTH account:

1. Right-click **PTH** under the **Security Providers** folder, and select **Manage Users/Groups** from the context menu.

   The PTH Users and Groups Management page opens, listing all registered users on the left, and all registered groups on the right.
2. Select a user and click Properties.
   
The PTH User properties dialog box opens.

3. Click Account disabled as shown in the following image:

4. Click OK.
   
A red x is displayed in the Disabled column for that user on the PTH Users and Groups Management page.

5. Click Save.
Configuring DBMS Authentication

With a DBMS security provider, there is no impersonation by data agents, but connection credentials are authenticated against a configured DBMS. This technique is called password passthru, as user IDs and passwords supplied by the client are passed to the DBMS for authentication.

A DBMS security provider supports profiles for users on all platforms. Profiles for groups are not supported.

**Note:** For more information on limiting user access to the Web Console, see *Configuring General Server and Web Console Actions* on page 106.

**Procedure:** How to Configure DBMS Authentication

This procedure assumes that the server is already running.

1. Access the Web Console with a server administrator user ID.
2. From the Adapter pane, configure a DBMS adapter and connection.
3. Select the **Password Passthru** security option on the Adapter configuration pane.

   Note that the **Test** button, which appears next to the **Configure** button, will not work until you configure the DBMS security provider. Do not restart the server at this point.

4. Select **Access Control**. The Access Control page opens.
   The server security provider is displayed on the Access Control page.
5. To add the DBMS provider, expand the Security Provider folder, right click DBMS, and choose New.

6. Enter a name for the DBMS provider.

7. Select a security_dbms from the drop-down list.
   This option identifies the database engine used to authenticate incoming requests.

8. Select a security_connection from the drop-down list. This list shows all DBMS connections that are configured with Password Passthru.
   This option identifies the database connection used to authenticate incoming requests.

9. At this point, it is a good idea to click the Test button to make sure the DBMS connection is working. You will be prompted for a password for the selected user ID. Click Continue. The DBMS will authenticate this ID. If it is a valid DBMS ID, a message will be returned indicating that authentication was successful. If the ID is not a valid DBMS ID, the DBMS will return messages indicating that authentication was not successful.

10. Right-click the Access Control folder in the navigation pane, and select Activate Providers.

11. Select the DBMS drop-down list, and select Primary or Secondary.

12. Supply the Server Administrator user ID. Alternatively, you can enter a new user ID that will be added to the admin.cfg file as a Server Administrator.

13. Click Save.

   **Note:** For more information about changing security providers, see Considerations for Changing the List of Security Providers From the Web Console on page 87.

14. If the server is not running, start it using the instructions for your platform.

   The server will start configured for a DBMS security provider.

15. Examine the edaprint.log file. If it indicates that there were any errors, stop the server and then start it with security OFF to correct the errors.

16. Restart your browser and connect to the Web Console. When prompted, enter a valid DBMS user ID and password.

If you wish to add other DBMS users, first connect as a DBMS user defined as server administrator. Then, follow the instructions in Registering Users and Groups in a Role on page 117.

   **Note:** A common problem when switching from OPSYS to a DBMS provider is the existence of files in EDATEMP that cannot be removed due to insufficient privileges. To handle this problem, use edastart -cleardir (or member ICLRDIR on the z/OS platform) with EDAEXTSEC=OPSYS to clear the directory before switching.
Usage Notes for DBMS Security

- If an error is detected in the security_dbms definition, the DBMS is down, or your DBMS user ID is invalid, you will not be able to access the Web Console or connect to the server. In these situations, you must bring the server down using the line console and correct the problem.

- The server may have other DBMS connections defined, but only one DBMS connection can be used for user authentication.

Password Pass-through and Security DBMS

Security DBMS (using password pass-through) is supported for the following engines:

- Db2
- Informix
- MS SQL Server
- MySQL
- Oracle
- Sybase
- Teradata (ODBC)
- SAP R/3-ECC
- SAP BW
- Essbase
- Web Services

Logon Ticket Authentication for Logging Onto the SAP Portal

Single sign-on (SSO) enables users to login to the SAP portal with their credentials and then access WebFOCUS components, such as the Reporting Server with the SAP R/3 and SAP BW adapters, the Web Console, and the WebFOCUS client (Managed Reporting) without a secondary logon. This is achieved in the following manner:

- The user logs on to the SAP portal with a user ID and password. The portal authenticates the user and places a MYSAPSSO2 cookie in the browser.
When the user accesses the Web Console or the WebFOCUS servlet, the servlet will not do the authentication, but will, instead, trust the user ID and use it in the Managed Reporting environment and in the Web Console security scheme. For example, a user may be given server_admin or application_admin level privileges on the Reporting Server (using the admin.cfg file).

When the user runs a backend SAP report, the cookie is processed and passed to the SAP RFC connection that provides access to the SAP data.

**Procedure: How to Ensure Compliance With SSO Prerequisites for SAP BW and SAP R/3**

Complete the following steps to ensure that prerequisites have been met:

1. Export the public key certificate from the SAP portal into $EDACONF/etc.
2. Set Server security to DBMS.
3. Configure the SAP/BW or SAP R/3-ECC connection for Password-Passthru.
4. Ensure that Security DBMS with Password-passthru to SAP/BW or SAP R/3-ECC is working.
5. Ensure that SAP RFCSDK 6.40, SAP SSOEXT, and SAP SECULIB 5.4 are in the path. (Check your Operating System or consult a system administrator for details.)

Once prerequisites have been satisfied, complete the SSO verification procedure.

**Procedure: How to Complete SSO Verification**

1. From the SAP portal (http://sapportal.mydomain.com:50000), execute a command that requires authentication (using a logon screen from the Portal).

   This generates an SSO cookie.

2. Overwrite the SAP portal url with the one for the WebFOCUS Reporting Server, using the same domain (for example, http://iwayserv.mydomain.com:8101).

   At this point, no logon screen should pop up since the user is logged in and SSO login has been successfully verified.

**Configuring LDAP Authentication**

With an LDAP (Lightweight Directory Access Protocol) security provider, there is no impersonation by data agents, but connection credentials are authenticated against the established directory services. From the operating system point of view, all server processes run as a single user ID.

An LDAP security provider is presently supported on Windows, UNIX, IBM i, and the Unified Server (HFS and PDS deployments).
An LDAP security provider supports profiles for LDAP users and LDAP groups.

**Note:** For more information on limiting user access to the Web Console, see *Configuring General Server and Web Console Actions* on page 106.

**Procedure:** How to Configure an LDAP Security Provider

1. Sign in to the Reporting Server Web Console as a server administrator.
2. Open the *Access Control* page.
3. If this is the first LDAP security provider being configured:
   a. Right-click the *LDAP* folder under *Security Providers*, and select *Properties* from the context menu.
   b. Select the LDAP vendor from the drop-down list and click *Continue*.
   
   **If you choose OpenLDAP on LINUX, you will see two additional fields**, `ldap_libldap` and `ldap_liblber`. These parameters specify the names of the OpenLDAP libraries that the server module loads at run time. The path to the libraries should be available to the server at run time. You are prompted to specify the library name at run time. If you do not supply a different name a default library name is used.

4. Under the *Security Providers* folder, right-click *LDAP* and select *New*.

   The LDAP Security Provider Configuration page opens. The configuration parameters have been grouped into categories, and there are buttons for retrieving sample lists of users and groups.

5. Enter or select values for the following Connection Properties.

   **LDAP_PROVIDER**

   Specifies a name for this provider.

   **ldap_host**

   Is a host identifier consisting of a host name or an IPv4 dotted string representing the IP address of a host running the LDAP server to connect to.

   Alternatively, it may contain a list of space-delimited host identifiers. Each host identifier may include a trailing colon and port number. In the case where more than one host identifier is specified, each host identifier in turn will be contacted until a connection can be established. For example:

   ```
   directory.example.com
   192.0.2.0
directory.example.com:1050 people.catalog.com 192.0.2.0
   ```
ldap_secure_connection

Specifies whether the server uses a Secure Socket Layer (SSL) session with the LDAP server. Select No or Yes. The server default is No.

An LDAP (Lightweight Directory Access Protocol) security provider supports Secure Sockets Layer (SSL) API calls to establish an SSL/TLS connection. Using server authentication only, the Reporting Server initiates API calls to verify that the LDAP server being connected to is the same server that provided certification.

You can set the LDAP secure connection from the Web Console:

- Select No, the default value, if you do not wish to enable SSL.
- Select Yes to enable an encrypted Secure Sockets Layer (SSL) session with the LDAP server.

If you have selected IBM, Sun, or Novell as the your ldap_lib_vendor, when you select Yes in the ldap_secure_conection field, additional options are added to the Connection tab:

- For Sun and IBM, ldap_ssl_certificate is added.
- For Novell, ldap_ssl_certificate and ldap_ssl_certification_encoding are added.

**ldap_ssl_certificate.** Enter the name of the LDAP attribute used by the API to establish the SSL/TLS connection. The server employs server authentication only, checking through API calls that the LDAP server you are connecting to is the one that provided the certificate. Values depend on the LDAP vendor, as follows:

- **Novell API** specifies the file name, including path, of the Trusted Root Certificate that the LDAP server provided for authentication.

- **Sun/Netscape API** specifies the path to cert7.db, Netscape certificate database, excluding the file name, that the LDAP server provided for authentication.

- **IBM API** specifies the file name, including the path, for ldapkey.kdb (IBM key database file that the LDAP server provided for authentication). The ldapkey.sth password stash file should be in the same directory. Note that in addition to IBM LDAP client libraries, Global Security Kit libraries are needed to make SSL work. On Windows machines, GSK must be installed.

- **Microsoft API** ignores the ldap_ssl_certificate configuration parameter since it is not used in an Active Directory. The server certificate should be installed in a certificate store.
**ldap_ssl_certificate_encoding.** For Novell, select the standard used to encode the certificate from the drop-down list. Encryption and file format depend on API vendor specifications. The options are B64 and DER.

**ldap_port**

Is a positive integer that defines the TCP port number used to connect to the LDAP server. Note that ldap_port is ignored for any host identifier which includes a colon and port number. The server default port is 389 or 636 (for SSL connection).

**security**

Determines the type of bind used. Can be one of the following.

**Anonymous**

The bind is performed using no credentials. This is the internal default value.

**Windows security (NEGOTIATE)**

The reporting server authentication is performed against Active Directory utilizing a Windows-specific API.

The bind is done under the Windows account that started the server.

The windows machine that hosts the reporting server should be in the same domain as Active Directory.

**Explicit**

The bind is performed under the account that is defined by configuration parameters `ldap_principal` and `ldap_credentials`.

**Note:** When connecting to Active Directory using **Explicit** or **NEGOTIATE**, `ldap_user_attribute` should have the value `sAMAccountName` or `userPrincipalName`.

**ldap_search_timeout**

Specifies the timeout in seconds for ldap_search. The server default value is 60 seconds.

6. **Click Next.**

The User Search category of parameters opens. The common parameters for User Search and Group Search are automatically populated.

7. **Configure the following user search and group search parameters.**
**User properties**

`ldap_user_base`

Specifies the DN of the entry that serves as the starting point for the search. Consists of attribute=value pairs, separated by commas. The server default is `dc=ibi,dc=com`.

`ldap_user_scope`

Specifies the scope with which the LDAP realm should search for users. Select `Subtree`, `Onelevel`, or `Base`:

- **Subtree** scope indicates that the LDAP realm should search everything under the base DN.
- **Onelevel** scope tells the LDAP server to only search entries one level down from the base DN.
- **Base** indicates that the search should be done at the search base only.

The server default is **Subtree**.

`ldap_user_class`

Specifies the object class used when searching for user entries. The server default is `person`.

`ldap_user_attribute`

Specifies the LDAP attribute used when searching for user entries. `uid` is the default value for LDAP and `sAMAccountName` is the suggested value for Active Directory. One possible reason to change the default value would be to allow users to logon with an email address instead of a user ID. In this case, you might change the value to `mail` or `userPrincipalName` (if this corresponds with the name of the appropriate attribute in your directory).

`ldap_user_group_attribute`

Specifies the LDAP attribute used to identify a group in a user object.

The Active Directory standard is `Memberof`.

`ldap_user_description`

Optional. Specifies the name of the attribute whose value contains description of an object (user, group). The server default is `description`.

`ldap_user_email`

Optional. Specifies the name of the attribute whose value contains the user email address. The server default is `mail`. 
Note: ldap_user_class, ldap_user_attribute, ldap_group_class, ldap_group_attribute are parameters that form a search filter.

The search filter standard syntax conforms to the following structure:

(& (Property_Name=Property_Value) (Property_Name=Property_Value))

If you change value of the ldap_user_class and ldap_group_class parameters to an asterisk (*), the search filter syntax can be reduced to the following simplified form (although group support will not work properly):

(Property_Name=Property_Value)

By specifying an asterisk for these parameters, you achieve simplified search filter syntax, but in effect, disable group support.

Group properties

ldap_group_base

Specifies the DN of the entry that serves as the starting point for the search. The server default is the ldap_user_base value.

ldap_group_scope

Specifies the scope with which the LDAP realm should search for groups. Select Subtree, Onelevel, or Base:

Subtree scope indicates that the LDAP realm should search everything under the base DN.

Onelevel scope tells the LDAP server to only search entries one level down from the base DN.

Base indicates that the search should be done at the search base only.

The server default is Subtree.

ldap_group_class

Specifies the object class used when searching for group entries. The server default is groupofuniquenames. The Active Directory standard is group.

ldap_group_attribute

Specifies the LDAP attribute used to identify the name of the group. The server default is cn.

ldap_member_attribute

Specifies the LDAP attribute used to identify users in a group. The server default is uniqueMember. The Active Directory standard is Member.
ldap_nested_groups
Disables or enables LDAP nested groups support. Select No or Yes. The server default is No, which disables nested group support.

ldap_group_description
Optional. Specifies the name of the attribute whose value contains description of an object (user, group). The server default is description.

8. Specify whether the server should accept trusted connections.

trust_ext
Specifies whether the server should accept trusted client connections. If there are multiple security providers, some may allow trusted connections and some may not. In these cases, if the trusted connection is made using a provider without the ability to accept trusted connections, the user will get an authentication error. The server default is n.

9. To test the configuration, click Test User Authentication.
A Testing LDAP Security logon window opens.
Enter a valid user ID and password for this LDAP security provider and click Continue.
If your configuration and credentials are valid, a window opens telling you that you were successfully authenticated.
If they are not valid, you will get a corresponding message.

10. To generate a sample user list, click Sample User List.
A partial list of users with their descriptions and group memberships opens.

11. To generate a sample group list, click Sample Group List.
A partial list of groups with their descriptions and a partial list of members opens.

12. To save this configuration, click Save. To go back to the first configuration page, click Back.
If you chose Save, the Change Effective Security Provider(s) page opens.

a. Select a Security Provider name from the drop-down list.

Note: Each time you select an LDAP Security Provider, another Security Provider drop-down box is generated.

b. Enter or select the user ID of the Server Administrator. The user must be a valid server administrator in the LDAP database.
c. If the server was not started configured for an LDAP security provider, the button at the bottom of the page says *Apply and Stop Server*. Click the button and manually start the server configured for an LDAP security provider.

If the server is already running configured for an LDAP security provider, the button at the bottom of the page says *Apply and Restart Server*. Click the button and wait for the server to restart.

13. If the server was started configured for an OPSYS security provider, click the *Apply and Stop* button. Otherwise, click the *Apply and Restart* button.

- If you click *Apply and Stop*, the server stops; proceed with Step 9.
- If you click *Apply and Restart* button, the server restarts configured for an LDAP security provider.

**Note:** For more information about changing security providers, see *Considerations for Changing the List of Security Providers From the Web Console* on page 87.

14. If the server is not running, start it using the instructions for your platform.

The server will start configured to use an LDAP security provider.

15. Examine the edaprint.log file. If it indicates errors, stop the server, then start it with security OFF to correct the errors.

16. Restart your browser and connect to the Web Console. When prompted, enter a valid LDAP user ID and password.

17. When you start the server using an LDAP security provider, you can select an LDAP Provider from the *Security Provider* drop-down list. By default, the primary (first) LDAP security provider is selected.

**Note:** A common problem when switching from OPSYS to LDAP is the existence of files in EDATEMP that cannot be removed due to insufficient privileges. To handle this problem, use edastart -cleardir (or member ICLRDIR on the z/OS platform) with EDAEXTSEC=OPSYS to clear the directory before switching.

**Procedure:** How to Remove an LDAP Security Provider From the Web Console

1. Logon to the server with Server Administrator credentials.

2. Select *Access Control*.

   The Access Control page opens.

3. Right-click the security provider that you want to remove in the *Security Providers* folder and select *Remove* from the context menu.

   A dialog box opens asking you to confirm that you want to remove the provider.
4. Click OK.

**Reference:** LDAP Vendor Library Prerequisites

**Important:** Although the Server supports a number of vendor libraries for each platform, as described in the following chart, Information Builders recommends that, whenever possible, you use the native libraries for your Operating System.

**System Requirements.** An LDAP Security provider requires the appropriate LDAP vendor library files to be available to the server at run time:

1. If the LDAP vendor library files are not currently available on the server platform, download them from the appropriate vendor Web site, unzip them if necessary, and transfer them to the server platform.

2. Edit the library path or (on Windows) the system path to include the location of the library files.

**Windows:** The LDAP vendor library files for Windows systems are:

<table>
<thead>
<tr>
<th>Sun</th>
<th>IBM</th>
<th>Novell</th>
<th>Microsoft</th>
</tr>
</thead>
<tbody>
<tr>
<td>libnfspr4.dll</td>
<td>libidsldap.dll</td>
<td>ldapssl.dll</td>
<td>wldap32.dll</td>
</tr>
<tr>
<td>libplc4.dll</td>
<td>libibmldapdbg.dll</td>
<td></td>
<td>advapi32.dll</td>
</tr>
<tr>
<td>libplds4.dll</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>nsldap32v50.dll</td>
<td>ldapsdk.dll</td>
<td>(64 bit NA)</td>
<td></td>
</tr>
<tr>
<td>nsldappr32v50.dll</td>
<td>ldapssl.dll</td>
<td></td>
<td></td>
</tr>
<tr>
<td>nsldapssl32v50.dll</td>
<td></td>
<td>(64 bit NA)</td>
<td></td>
</tr>
<tr>
<td>nss3.dll</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>sasl32.dll</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ssl3.dll</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>(64 bit NA)</td>
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<td></td>
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</tr>
</tbody>
</table>

**IBM z/OS and IBM i:** The LDAP vendor library files for IBM z/OS and IBM i systems are:

<table>
<thead>
<tr>
<th>z/OS</th>
<th>IBM i</th>
</tr>
</thead>
<tbody>
<tr>
<td>statically linked</td>
<td>statically linked</td>
</tr>
</tbody>
</table>
**UNIX**: The LDAP vendor library files for UNIX systems are:

<table>
<thead>
<tr>
<th>OS</th>
<th>Vendor</th>
<th>statically linked</th>
<th>libldapsdk.so (64 bit NA)</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>AIX</td>
<td>libldap50.so</td>
<td></td>
<td>libldapsdk.so</td>
<td></td>
</tr>
<tr>
<td></td>
<td>libnspr4.so</td>
<td></td>
<td>(64 bit NA)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>libnss3.so</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>libplc4.so</td>
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<tr>
<td></td>
<td>libplds4.so</td>
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<tr>
<td></td>
<td>libprldap50.so</td>
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</tr>
<tr>
<td></td>
<td>libasasl.so</td>
<td></td>
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<tr>
<td></td>
<td>libssl3.so</td>
<td></td>
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<tr>
<td></td>
<td>libsslldap50.so</td>
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<td></td>
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<td></td>
<td>libldapsdk.so</td>
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<td>libldapsdk.sl</td>
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<td>HP</td>
<td>libldap50.sl</td>
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<td>libnspr4.sl</td>
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<td>libldapsdk.sl</td>
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<td></td>
<td>libnss3.sl</td>
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<td>libplc4.sl</td>
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<td>libplds4.sl</td>
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<td></td>
<td>libprldap50.so</td>
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<td>libldapsdk.sl</td>
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<td></td>
<td>libasasl.sl</td>
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<td>libssl3.sl</td>
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<td>libsslldap50.sl</td>
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<tr>
<td></td>
<td>libldapsdk.sl</td>
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<tr>
<td></td>
<td>libldapsssl.sl</td>
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<tr>
<td></td>
<td>libldap_r.so</td>
<td>libldapiconv.so</td>
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<tr>
<td></td>
<td>libldapsssl.so</td>
<td>libldapconv.so</td>
<td></td>
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<tr>
<td>Linux</td>
<td>libldap50.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
<td></td>
</tr>
<tr>
<td></td>
<td>libnspr4.so</td>
<td>libldapiconv.so</td>
<td>libldapsdk.so</td>
<td></td>
</tr>
<tr>
<td></td>
<td>libnss3.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
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</tr>
<tr>
<td></td>
<td>libplc4.so</td>
<td>libberval.so</td>
<td>libldapsdk.so</td>
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<tr>
<td></td>
<td>libplds4.so</td>
<td>libberval.so</td>
<td>libldapsdk.so</td>
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<tr>
<td></td>
<td>libprldap50.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
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<tr>
<td></td>
<td>libasasl.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
<td></td>
</tr>
<tr>
<td></td>
<td>libssl3.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
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<tr>
<td></td>
<td>libsslldap50.so</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
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<tr>
<td></td>
<td>(64 bit NA)</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
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<tr>
<td>OS</td>
<td>Vendor</td>
<td>libibmldap.so</td>
<td>libldapsdk.so</td>
<td>libldapsssl.so</td>
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</tr>
</tbody>
</table>
| SunOS 5.8 | libldap50.so  
libnspr4.so  
libnss3.so  
libplc4.so  
libplds4.so  
libprldap50.so  
libsasl.so  
libssl3.so  
libssldap50.so | libibmldap.so | libldapsdk.so | libldapsssl.so | (64 bit NA) | N/A     |
| SunOS 5.9 and 5.10 | libldap.so (Native SunOS library) | libibmldap.so | libldapsdk.so | libldapsssl.so | (64 bit NA) | N/A     |

**Note:**

- NA = Not Available from vendor.
- LDAP SSL for Novell is not supported on the AIX platform.
- Statically linked builds do not require external libraries.
- When using third-party libraries, complete products should be installed and the associated libraries must be on the library path of the server before start up. The library path is driven by different variables depending on platform (Windows: PATH, HP-UX: SHLIB_PATH, AIX: LIBPATH, USS: LIBPATH, IBM i: Library Path, Other UNIX’s: LD_LIBRARY_PATH).
- Libraries shown in this table are the main libraries our module is linked with; they may, in turn, load a chain of system libraries, which also need to be present.
- Not all vendors provide 64 bit versions, but, when available, they are configurable.
- Before starting the configuration steps, independently verify your LDAP connection and any configuration ids being used. Testing may be done by downloading and installing an LDAP connection test tool such as Softerra LDAP Browser, at [http://www.ldapbrowser.com/](http://www.ldapbrowser.com/).
Making Sun LDAP Library Files Available

To make Sun LDAP library files available to the server at run time:

1. Access the product download Web site for Sun ONE Directory Server Resource Kit 5.2.1:
   
   http://www.sun.com/download/products.xml?id=3f74a0db

   (Note that this URL is correct as of the date these Release Notes were published. Third-party URLs are subject to change.)

2. Click the Download link at the bottom right of the Web page. (Do not click the Downloads menu option at the top of the page.)

   The login page opens. You will be prompted for a registered user login or to register.

3. Enter either your Sun username and password. If you do not have an account, click Register Now and follow the prompts to create an account and then log in. This is free.

4. Accept the license agreement.

5. Download the appropriate platform package. Select the optimized package, not the debug version.

6. Once downloaded, unzip the file, and then unzip the second zip file contained within the first.

7. Navigate to the directory in which you unzipped the downloaded file, and then cd to the lib subdirectory.

8. FTP the files you need (as indicated in LDAP Vendor Library Prerequisites on page 75), in binary format, to their own directory on the server platform.

9. Edit the library path to include the location of the library files you just FTPed.

Configuring Custom Authentication

CUSTOM security providers are used when the installation maintains non-standard repositories for users and groups, that is, when the standard methods like OPSYS and LDAP do not apply. An example of such a setup can be having RDBMS tables containing valid user IDs and their encrypted passwords, and also containing the mapping of users to groups. The customer may chose to access these tables using SQL SELECT statements, SQL Stored procedures, or Web Services. Typically these methods already exists and are used by other non-Information Builders components.

To enable the custom server security provider, the administrator needs to provide code that allows the server security module to perform these tasks:

- Authenticate the user based on user ID and password.
- Obtain all groups for a user (used at run time).
- Obtain all groups in the system (used for administrative actions).
- Obtain all users for a group and all users in the system (used for administrative actions).

The code for performing these tasks is written in the WebFOCUS language as TABLE FILE or SQL SELECT commands against the synonyms representing the SQL table, SQL Stored Procedure, or Web Service. The code can be debugged by running the server with security OFF and running the glue code from application folders. Once debugged, the code is deployed in EDACONF/catalog/custom, and the CUSTOM provider made active.

A tutorial sample called WebFOCUS- Custom SQL Security Provider is available that creates examples of user and group storage and custom procedures that can be used as prototypes. To generate a tutorial, right-click an application on the Application page and select New then Tutorials from the context menu.

**Procedure:** How to Configure a Custom Security Provider

1. On the Access Control page, right-click CUSTOM and select New from the context menu.

   The CUSTOM Security Provider Configuration page opens.

   **CUSTOM Security Provider Configuration**

   - CUSTOM_PROVIDER: cust01
   - cust_authenticateuser: example: ptauth
   - cust_usersbygroup: example: ptkusers
   - cust_groupsbyuser: example: ptgroups
   - cust_service: DEFAULT
   - trust_ext: n

   Note: Synonyms used by custom provider procedures should be moved to the directory EDACONF/catalog/custom. This is done by custom procedures. Any data access to these connections by users without Server Administrator privileges will be denied.

   [Save] [Test]

2. Enter values for the following parameters:

   **CUSTOM_PROVIDER**

   Is a name to assign to the security provider.
**cust_authenticateuser**

Is the name of the procedure that authenticates users. For information about creating an authentication procedure, see *Creating an Authentication Procedure for a Custom Provider* on page 81.

If you do not specify an authentication procedure, you must have a default server administrator user ID and password to use when connecting to the server. A default server administrator user ID was configured during server installation.

**cust_usersbygroup**

Is the name of the procedure that returns the list of all users or, if the group name is passed to the procedure, the list of all users in the group. For information about creating a procedure that returns users, see *Creating a Procedure That Returns Users* on page 83.

**cust_groupsbyuser**

Is the name of the procedure that returns the list of all groups or, if a user ID is passed to the procedure, the list of all groups for the user ID. For information about creating a procedure that returns groups, see *Creating a Procedure That Returns Groups* on page 84.

**cust_service**

Defines the data service to execute stored procedures specified in the custom security provider.

**trust_ext**

Specifies whether the server should accept trusted client connections using this provider.

The procedures can be located under the server configuration directory (EDACONF/catalog), the installation directory (EDAHOME/catalog), or in an application that is on the application path of every user.

We suggest that the synonyms used by custom provider procedures be copied to the directory EDACONF/catalog/custom. This will cause the server to protect adapter connections used by custom procedures. This means that only the Server Administrators and users with privilege WSCFG will have access to security data in those synonyms. All other users attempting to use this adapter connection will get an unauthorized message.

3. To test your configuration, click Test.

4. When you are satisfied with the test results, click Save.

Your custom security provider is listed under the CUSTOM item on the Access Control tree.
5. Select the appropriate primary security provider from the drop-down list and click Next. If you are changing primary providers, you may be asked to select or enter a Server Administrator user ID.

6. Click Save and Restart Server.

**Reference:** Creating an Authentication Procedure for a Custom Provider

The authentication FOCEXEC for a custom provider must check the user ID and password passed to the Reporting Server against the custom provider data source and return a code that defines to the Reporting Server the status of those credentials.

The server calls your authentication FOCEXEC using the following syntax:

```plaintext
EX ptauth ID=user1, PASSWD=pass1
```

where:

**ptauth**

Is the authentication procedure entered in the cust_authenticateuser field of the CUSTOM provider configuration page.

A simple example of an authentication procedure, ptauth.fex, is provided in the home/catalog directory.

**user1**

Is the user ID to be authenticated. It is stored in a variable named &USERID.

**pass1**

Is the corresponding password to be authenticated. It is stored in a variable named &PASSWD.

The authentication procedure must authenticate this user ID and password combination against the data source that contains the user credentials.

If the password is stored in encrypted form in the data source, the authentication procedure must encrypt the password using the same encryption process prior to authenticating it.

The authentication procedure must return a code to the Reporting Server based on the result of the authentication process. The syntax is:

```plaintext
-SET &a = SETAUTH(error_code, 'primary_group');
```

where:

**a**

Can be any valid variable name, for example &A.
error_code

Must be one of the following integers:

0

Indicates that the user ID and password are valid.

1

Indicates that the user ID is invalid.

2

Indicates that the password is invalid.

3

Indicates that the user ID has expired.

4

Indicates that the password has expired.

5

Indicates that another error occurred.

primary_group

Returns the primary group for the user. Enter the group ID enclosed in single quotation marks. If there is no primary group, enter two consecutive single quotation marks. For example:

-SET &A = SETAUTH(2, '');

You can provide messages in the authentication procedure using the -TYPE command. For example:

-INVALIDPASS
-TYPE invalid password
-SET &A = SETAUTH(2, '');

The message will display when you click the Test button on the CUSTOM Security Configuration page.

When a user actually attempts to sign in to the server, the server will:

- Sign the user in, if the credentials are valid.

- Prevent the user from signing in, if the credentials are not valid. In this case, the server will display a standard message on the sign-in page identifying the nature of the error.
Reference: Creating a Procedure That Returns Users

The procedure entered in the cust_usersbygroup field on the CUSTOM Provider Configuration page has to return either all users or, if passed a group ID, all users for that group.

The procedure should retrieve the following fields (some are mandatory, some are optional) from the data source that stores all user IDs and their properties:

**User ID**
- Mandatory
- Contains alphanumeric user IDs with a maximum length of 99 (A99).

**User Description**
- Optional
- Contains alphanumeric descriptive information with a maximum length of 97 (A79).

**User Email Address**
- Optional
- Contains an alphanumeric email address with a maximum length of 127 (A127).

**Group ID**
- Mandatory
- Contains alphanumeric group IDs with a maximum length of 99 (A99).

After retrieving the fields, you must issue the PCHOLD FORMAT COMT FORMATTED command to place them in a comma-delimited file with each field value enclosed in double quotation marks. For example:

```
ON TABLE PCHOLD FORMAT COMT FORMATTED
ON TABLE SET PAGE-NUM OFF
ON TABLE SET HOLDATTR OFF
```

The procedure should be able to retrieve the list of all users and the user list for one group.
The following procedure sets the variables &ID, &NAMEFILTER, and &DESCFILTER to _FOC_NULL by default.

It tests these variables to see if a specific group ID, a filter for the user ID, or a filter for the user description was passed to the FOCEXEC:

```
-DEFAULT &ID=_FOC_NULL',&NAMEFILTER=_FOC_NULL',&DESCFILTER=_FOC_NULL';
TABLE FILE USERINFO
PRINT DST.USERID DST.USERDESC DST.UEMAIL
IF GROUPID EQ &ID
IF USERID CONTAINS &NAMEFILTER
IF USERDESC CONTAINS &DESCFILTER
ON TABLE PCHOLD FORMAT COMT FORMATTED
ON TABLE SET PAGE-NUM OFF
ON TABLE SET HOLDATTR OFF
END
```

This procedure can be run as follows:

- To list all users:
  
  EX ptusers

- To list users who are members of group group1:
  
  EX ptusers ID=group1

- To list users where the user description contains the characters One:
  
  EX ptusers DESCFILTER='One'

A simple example of a users procedure, ptusers.fex, is provided in the home/catalog directory.

**Reference:** Creating a Procedure That Returns Groups

The procedure entered in the cust_groupsbyuser field on the CUSTOM Provider Configuration page has to return either all groups or, if passed a user ID, all groups for that user.

The procedure should retrieve the following fields (some are mandatory, some are optional) from the data source that stores all user IDs and their properties:

**Group ID**

- Mandatory
  
  Contains alphanumeric group IDs with a maximum length of 99 (A99).

**Group Description**

- Optional
  
  Contains alphanumeric descriptive information with a maximum length of 97 (A79).
User ID
Mandatory

Contains alphanumeric user IDs with a maximum length of 99 (A99).

After retrieving the fields, you must issue the PCHOLD FORMAT COMT FORMATTED command to place them in a comma-delimited file with each field value enclosed in double quotation marks. For example:

```
ON TABLE PCHOLD FORMAT COMT FORMATTED
ON TABLE SET PAGE-NUM OFF
ON TABLE SET HOLDATTR OFF
```

The procedure should be able to retrieve the list of all groups and group list for one user.

The following procedure sets the variables &ID, &NAMEFILTER, and &DESCFILTER to _FOC_NULL by default.

It tests these variables to see if a specific user ID, a filter for the group ID, or a filter for the group description was passed to the FOCEXEC:

```
-DEFAULT &ID=' _FOC_NULL',&NAMEFILTER=' _FOC_NULL',&DESCFILTER=' _FOC_NULL'
TABLE FILE USERINFO
PRINT GROUPID GROUPDESC
IF USERID EQ '&ID'
IF GROUPID CONTAINS &NAMEFILTER
IF GROUPDESC CONTAINS &DESCFILTER
BY GROUPID NOPRINT
ON TABLE SET PAGE-NUM OFF
ON TABLE SET HOLDATTR OFF
ON TABLE PCHOLD FORMAT COMT FORMATTED
END
```

This procedure can be run as follows:

- To list all groups:
  
  EX ptgroups

- To list groups that have user user1 as a member:
  
  EX ptgroups ID=user1

- To list groups where the group name contains the characters yyy and the group description contains the characters xxx:
  
  EX ptgroups NAMEFILTER='yyy' DESCFILTER='xxx'

A simple example of a groups procedure, ptgroups.fex, is provided in the home/catalog directory.
Encoding Passwords for a Custom Security Provider

You can configure Custom Provider authentication to encode passwords so that they cannot be viewed when they are passed as parameters to the authentication procedure.

1. On the Access Control tab, right-click a Custom Security Provider and select Properties from the context menu, or right-click the CUSTOM folder and select New from the context menu.

   The CUSTOM Security Provider Configuration page opens.

2. Select y from the cust_hashpasswd drop-down list.

3. Click Save.

When a user is authenticated, the server will send SHA-256 hashed passwords to the authentication procedure. This means that the passwords will be transformed into values that will be unusable for signing in to the Web Console and server. The hashed values have to be stored as passwords in the SQL database being used for authentication. As an alternative, you can create a utility called from the CUSTOM provider authentication procedure that decodes hashed passwords before sending a request to the SQL database for authentication.

Authenticating Users Across Multiple Security Providers

The Reporting Server can search across multiple LDAP sources, DBMS providers, an OPSYS provider, and a PTH server when authenticating users.

When authenticating or assigning privileges for a provider that is not the primary provider, the user ID is a two-part name consisting of the provider name and the user ID:

   provider\userid

The authentication is done based on a two-part name.

The Server Administrator can add and remove security providers from the list at any time.

For instructions on configuring PTH and LDAP security providers, see Configuring PTH Authentication on page 58 or Configuring LDAP Authentication on page 67.

Procedure: How to Change the Security Provider List

If you want to change the list of security providers:

1. Logon to the server with Server Administrator credentials.

2. Click Access Control, and the Activate Providers page appears in the right pane. You can also right-click the Access Control folder and select Activate Providers from the context menu.

   The Activate Providers page opens.
3. You change the status of a provider by selecting a value from its drop-down list. If you make a provider Primary, the provider that previously had that status changes to Secondary.

**Note:**

- You can change the effective administrator ID by going to the Access Control page, right-clicking **Access Control** at the top of the Access Control tree, and selecting **Settings** from the context menu.

- When registering and assigning privileges for a user or group, the server uses a two-part name consisting of the provider name and the user or group name (for example, ldap2/user1 or ldap2/group3).

**Reference:** Considerations for Changing the List of Security Providers From the Web Console

You can configure multiple security providers using the Web Console. A security provider can have the status Primary, Secondary, or Inactive. It is important that there be a valid server administrator ID for one of the active (Primary or Secondary) security providers so that you can use it to connect to the Web Console or Data Management Console as a Server Administrator after changing the active security providers list.

When you switch between security providers from the Web Console, you will be prompted to restart the server.

Environment variable EDAEXTSEC is only used to disable server security.

**Enabling Trusted Connections**

You can enable trusted connections separately for each security provider.

You can configure a security provider to accept trusted connections by setting its trust_ext value to `y`.

1. Right-click a security provider on the Access Control tree and select **Properties** on the context menu. This example shows a PTH security provider, but the same setting is available for all security providers.
The Configuration page for that security provider opens.

![Security Configuration PTH<internal>](image)

2. From the trust_ext drop-down list, select y.
   
   This setting is available for all types of security providers.

3. Click Save and Restart Server.

### Identifying a Default Provider for Trusted Groups

When multiple security providers are configured, one must be identified as the default provider for trusted connections when WebFOCUS or other client software sends a trusted group ID without a security provider to the server.

To set the default provider for trusted groups:

1. On the Access Control page, click Settings on the ribbon, or right-click the Access Control folder and select Settings from the context menu.
The Access Control Settings page opens, as shown in the following image.

2. You can select a security provider that accepts trusted connections from the trusted_group_default_provider drop-down list. You must select a provider that is configured to accept trusted connections. You can also enter IP addresses to be mapped to a specific provider, if no provider name is supplied by the client.

Setting an Anonymous User ID

An authorized server administrator can set an anonymous user ID that can access the Web Console when the user ID/password fields on the Web Console login screen are blank and the user clicks Log in.

This anonymous user ID provides the ID and, in turn, the user rights for the Web Console and the server. Further configuration for the anonymous user can be achieved by creating a user profile for the anonymous user ID. If an anonymous ID matches a user in the admin.cfg list, the applicable role and privileges are applied.

**Note:** On Windows, for security provider OPSYS only, you must turn IWA security off to use this feature. From the Workspace folder in the navigation pane, open the Special Services and Listeners folder, right-click TCP/HTTP, and select Properties. Click the Security IWA check box to deselect it.
Procedure: How to Set an Anonymous User ID

1. Log on to the Web Console using a user ID that has server administration rights.
2. Select Access Control from the Web Console menu bar.
3. Right-click Access Control in the navigation pane, and select Settings.
   The Access Control Settings pane opens.
4. Enter a user ID in the anonymous_id field.
5. Enter a password in the anonymous_pass field and repeat it in the Confirm Password field.
6. Click Apply and Restart Server.

Configuring User Password Settings

You can configure the following password settings for any security provider:

- View or change the password separator character.
- Enable users to change passwords from the Web Console login page.
- Control the start time of warning messages on operating systems that support password expiration.

Viewing or Changing the Password Separator Character

When an application has the option to change a user password, the old and new passwords are sent to the server using a separator character (by default, a comma). For example:

old_password,new_password

The separator character is defined by the password_change_delimiter field. The separator needs to be reset if the current separator character is contained in the password itself or if it is allowed by the server.

This feature is not supported when Security is OFF.

Procedure: How to View or Change the Password Separator Character

1. From the Web Console menu bar, select Access Control.
2. Right-click Access Control in the navigation pane, and select Settings.
   The Access Control Settings page opens.
3. In the password_change_delimiter field, enter a single character to use as the delimiter between an old and new password. (The default character is a comma.)
Note that you cannot use the designated password_change_delimiter character in a password.

4. Click Apply and Restart Server.

Enabling Password Changes From the Web Console Sign-in Page

A Server Administrator can allow users to change their password from the Web Console sign-in page. By default, users cannot change their passwords from the Web Console sign-in page.

Procedure: How to Enable Password Changes From the Web Console Sign-in Page

1. Sign in to the Web Console with Server Administrator privileges.
2. From the Web Console menu bar, choose Access Control.
3. Right-click Access Control in the navigation pane, and select Settings, or click Settings on the ribbon.
   The Access Control Settings page opens.
4. Enter y in the password_change_wclogin field. The default is n.
5. Click the Apply and Restart Server button.

Sign-in Password Expiration Warning

On Operating Systems that support password expiration, you can specify that a warning message be displayed a specified number of days prior to the expiration date. The message will appear after the initial login screen. You must then click the Continue button to open the Web Console. Users can employ standard tools to change their passwords before expiration occurs.

Note: The password expiration warning is supported only on operating systems where IDs are configured to expire and this extended security feature is active for the user ID. However, expiration warning is not currently supported on the Windows platforms.

Procedure: How to Initiate Notification of an Imminent Password Expiration

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Special Services and Listeners folder, then click TCP/HTTP and select Properties or HTTP from the context menu. The Listener Configuration pane opens.
3. Expand the Sessions Control group.
4. In the PASS_EXPIRE_NOTIFICATION field, enter the number of days prior to expiration that you want the warning to begin to appear when a user whose password is about to expire logs in.
5. Click the Save and Restart Server button.

Configuring Privileges and Other Authorizations

WebFOCUS users are authenticated against one of the supported authentication sources (OPSYS, LDAP, DBMS, PTH internal, or CUSTOM). The underlying security system may divide users into groups. For example, for OPSYS security the groups are defined in the operating system, and in LDAP they are defined in the LDAP database. With a PTH security provider, the server file named admin.cfg defines groups. A CUSTOM provider executes custom requests against user-defined security storage, for example an SQL database.

To assign privileges to server application and data files, you must register groups of users to a server role and customize the privileges. In exceptional cases, you may register individual users to a server role and customize its privileges. The authorizations then depend on the privileges assigned to the role.

With any type of security, access to the following categories of resources must be controlled:

- **DBMS data.** Access is controlled by the CONNECTION attributes in effect at the time the data is accessed. The connections are stored in user or group profiles or in the server edasprof profiles.

- **Access to Web Console system functions.** This category includes functions such as change of server profiles, creation of metadata, or starting the servers. Access to these functions is defined by the role assigned to the user or group and is stored in the admin.cfg file.

- **WebFOCUS repository files that constitute the application.** These files include FOCEXECs, Master and Access Files, HTMLFORMs, and application files that are stored in the application directories.

The Server provides an Access Control function that enables the Server Administrator to create and edit permissions for different categories of users and groups. These permissions define whether specific users and groups can read, write, and/or execute WebFOCUS repository files and perform various Web Console system functions. To open the Access Control page, select Access Control on the Web Console menu bar.

In addition to users and groups, the server supports security subjects called roles. The server comes with a set of standard roles, and these roles come with a fixed set of general privileges. For more information about these standard roles, see Configuring Roles on page 114.
The Server Administrator can register roles, groups, and users. When registered, they are assigned a set of general privileges and file access privileges. By default, groups inherit privileges from the roles they are assigned, and users inherit their privileges from the groups or roles to which they are assigned. The Server Administrator can create new roles and customize privileges for any role, group, or user. The Server Administrator always has full privileges, and those privileges are not adjustable.

It is considered good practice for a large user community to define access rules on the group level and not on the individual user level. This technique allows volume user provisioning to be handled outside of WebFOCUS Server software (for example in the LDAP server). The WebFOCUS Server in general registers group access rights, plus some individual users as an exception, such as managers or special project people.

The following defines the order of precedence for access rights:

- User access overrides group access, and group access overrides role access.
- If the user belongs to multiple groups, the server group_profile setting determines whether only the primary group is in effect or whether the user can select a group at logon.

### Configuring DBMS Authorization

With DBMS authorization, the main object to be protected is the DBMS resident data that the server reads and writes. Access control is implemented using ENGINE CONNECTION_ATTRIBUTES statements that define the security attributes that are used by the server agent for connecting to the DBMS. The connection security type depends on the DBMS and can be one of three subtypes:

- **Explicit.** The userid/password is stored in a profile (encrypted).
- **Password passthru.** The userid/password combination or cookie, such as MYSAPSSO2, that were provided during the connection to the server is passed to the DBMS connection.
- **Trusted.** This type of connection applies to security provider OPSYS where the agent operating system process impersonates the user, and the DBMS connection is derived from that process.

The CONNECTION_ATTRIBUTES statement itself can be defined in the user, group, role or server profile, and they override each other in this order.

It is common initially to create connections in the edasprof server profile. They will then be inherited by all users. Subsequent configuration steps may define connections on other levels, such as the group or user level.
The CONNECTION_ATTRIBUTES statement in effect passes the credentials to the DBMS, and the DBMS server ensures the correct access control: read and read/write rules on the DBMS tables, views, columns, and rows.

For more information about the CONNECTION_ATTRIBUTES command, see the Adapter Administration manual.

Configuring Server DBA Security

The server engine can add an additional level of access control by defining DBA rules in synonyms to restrict access to columns and certain data values. This applies only to data access using the WebFOCUS language, and not to Direct SQL Passthru requests. For more information about Server DBA, see the Describing Data With WebFOCUS Language manual.

Calculating Privileges for Any Registered or Unregistered User or Group

The server administrator can calculate the privileges of any registered or un-registered user or group on the server by right-clicking the Access Control tree and selecting General Privileges or Directory/File Privileges from the context menu or by clicking General Privileges or Directory/File Privileges on the ribbon.

The Show Privileges page opens.

You can select a security provider and whether to show the privileges of a user, group, or role under that security provider. You must enter a valid ID for the user, group, or role.

You can enter an unregistered user or group, then the server will calculate the privileges based on user membership and its group registration.

When you click Next, the server calculates the appropriate privileges and returns a page of Properties for registered users and groups with tabs for General Privileges and File/directory Privileges. This page also indicates whether the security subject you chose is registered and, if not, which privileges it inherits. If your server is configured with profile_setting=all, and you select a user who belongs to multiple registered groups, the privileges of all will be combined in the display.

Permissions for Server Application Files and Directories Using a Non-OPSYS Security Provider

The Server Administrator can specify read/write, execute, and list privileges for files in application directories and for the directories themselves. This control is in addition to operating system file access control which follows the current umask setting.
The Server Administrator can view or edit File, Directory, and General privileges by clicking the Directory/File Privileges or General Privileges button on the ribbon, or by right-clicking a role, group, or user on the Access Control page and selecting Directory/File Privileges or General Privileges.

Non-Server Administrator users can right-click any object on the left panel and select Properties to see their privileges for that file or directory object. The Server Administrator has the option to manage privileges by right-clicking an object.

By default, for compatibility with previous releases, file access control allows complete access to all files and directories. However, the Server Administrator can reset this default by right-clicking a row in the table and choosing Edit Privileges. For information, see How to Configure General Privileges on page 106.

After initial server installation, the Server Administrator should review individual privileges for each role and customize them if needed. For example, the write privileges for basic users to applications on the APPPATH can be removed.

File privileges can be defined on the lowest level, such as a specific file and specific user, but the recommended policy is to define them on the application folder level and on the role and group levels to reduce administrative overhead. Privileges defined on the application level will apply to (be inherited by) all files in this application and by all nested (lower level) application directories, unless overridden on a lower level. The same applies to roles, groups, and users. Privileges defined on the group level will be inherited by the users in the group, unless overridden by explicit user registration.
The following schematic shows the flow of privilege assignments and inheritance.

In effect, when the system opens a file such as `app1/app2/car.mas` for user `user1` in group `group1` belonging to role `role1`, the server uses a specific search path until the privileges are found. The server administrator can also see the directory and file privileges from the Application Directories page by right-clicking an application and selecting the `Privileges` option.

Users without administrator rights can see the privileges from the file or directory `Properties` option.
**Example:** Search for Privileges for Users Who Are Not Registered

The following describes the search path if user1 is not registered or has not been assigned a role in admin.cfg. Assume the user is in group1 and group1 is registered under role1:

1. App1/app2/car.mas for group1.
2. App1/app2 for group1.
3. App1 for group1.
4. * for group1
5. App1/app2/car.mas for role1.
6. App1/app2 for role1.
7. App1 for role1.
8. * for role1.

If group1 were not registered, the user would be assigned the default role.

**Example:** Search for Privileges for Registered Users

If user1 is registered in admin.cfg, the server uses the following search path. The lines ending with an asterisk (*) denote a recommended practice:

1. App1/app2/car.mas for user1.
2. App1/app2 for user1.
3. App1 for user1.
5. App1/app2 for role1.
6. App1 for role1.
7. * for role1.

If the user is registered under a role, the server does not consider group privileges when access to the file or directory is calculated.

**Reference:** Understanding Access Control Permissions

When file and directory access control privileges are being set, the registration of physical file locations is not saved using a full path reference in all cases. When a location is in a folder under one of the server internal locations EDACONF, EDAHOME, APPROOT, or EDAPRFU, it is registered as a reference that is relative to that server location. The physical paths to EDACONF, EDAHOME, EDAPRFU and APPROOT are defined when the server is installed.
For example, if the privilege is for the directory `D:\ibi\srv77\wfsV8\etc`, and if the EDAHOME location has been established as `D:\ibi\srv77\wfsV8`, any privilege registered for that location will be registered using a relative reference based on EDAHOME:

```
admin_privilege = (EDAHOME)\etc;PRRUN
```

Then, if a new server release is installed in a different file system, the privilege will be applied to the correct directory in the new file system because the EDAHOME location will contain the correct directory reference for that system.

Registration of files and directories located outside of EDACONF, EDAHOME, APPROOT and EDAPRFU locations are registered as full physical paths.

Access Control parameters are saved in the server admin.cfg file.

```
{admin_id|admin_group} = name
admin_privilege = object; privilege_name, privilege_name[, ...]
```

where:

- **name**
  - Is a user (admin_id) or group (admin_group) name.

- **object**
  - Defines the directory or file path.
  - Can be one of the following:
    - Physical path to the file or directory.
      - For example
        ```
c:\myapp\appl c:\myapp\myfile.foc
```
      - where * is a token that designates all physical files on the system.
    - A path relative to one of the server internal locations EDACONF, EDAHOME, APPROOT, or EDAPRFU.
      - For example:
        ```
        (APPROOT)\appl (APPROOT)\ibisamp\car.foc
        ```

- **privilege_name**
  - Defines the type of access. Can be one of the following:
    - AREAD reads and displays the content of a file to the user. For example, the user can see (but not change) procedures and synonyms. The user needs read permission to open data files.
ARWRT Write allows the user to read, edit, and write procedures and metadata.

PRRUN Execute. This privilege is typically given to end users who need to execute FOCEXECs and use Master Files and relevant utility procedures. However, the data file used by a FOCEXEC and Master File only requires read permission.

ALIST allows the user to list and view files and folders on the application tree or the output of a deferred execution run.

ANONE revokes all permissions.

Note that definitions in the admin_privilege strings can contain relative path references for application directories under APPROOT and other internal locations. However, fully-qualified physical paths are also respected.

**Example:** Useful Combinations of Permissions

1. Full Access - read, write, execute, list
   
   This setting is typically used by developers on applications that they develop and create directly.

   This is the default for all files not explicitly customized, unless the default is reset. To explicitly specify full access, issue the following setting in admin.cfg:

   ```
   admin_privilege = directory/file_path; ARWRT, AREAD, PRRUN, ALIST
   ```

2. Read, execute, and list.
   
   This permission can be used by developers for other utility application directories that they invoke while developing their own.

   For example, a developer can keep common synonyms and utility FOCEXECs in such a directory. Of course, the person that creates such a directory needs full access to it, but all others only need read and execute. Read is needed to open data files.

   ```
   admin_privilege = directory/file_path; AREAD, PRRUN, ALIST
   ```

3. Execute.

   This permission is typically given to end users who need to execute FOCEXECs and use Master Files and relevant utility procedures.

   ```
   admin_privilege = directory/file_path; PRRUN, ALIST
   ```
4. Execute and hidden.
   This is the same as Execute except that it is not shown on the Web Console.
   \texttt{admin\_privilege = directory/file\_path; PRRUN}

5. List and View.
   This allows the user to view reports from deferred jobs. This privilege is lower than execute.
   \texttt{admin\_privilege = directory/file\_path; ALIST}

6. No Permissions.
   This revokes all permissions from the directory or file.
   \texttt{admin\_privilege = directory/file\_path; ANONE}

\textbf{Example:} \textit{Sample Permissions}

The privileges for locations relative to EDACONF, EDAHOME, APPROOT, and EDAPRFU are set using the following syntax

\texttt{admin\_privilege=(APPROOT)/baseapp;AREAD, ARWRT, PRRUN, ALIST}

However, existing privileges set using the full physical name are respected.

These examples use the following directories and files:

\texttt{/u1/pgmabb/myapp}
\texttt{/u1/pgmabb/myapp/data1.dat}
The following shows a sample permission distribution list:

```
admin_id = chief_developer
BEGIN
admin_level = APP
admin_privilege = *; ARWRT,AREAD,PRRUN,ALIST
admin_privilege = (APPROOT)/work_app; AREAD,PRRUN,ALIST
END
admin_group = team_developer
BEGIN
admin_level = APP
admin_privilege = (APPROOT)/main_app; AREAD,PRRUN,ALIST
admin_privilege = (APPROOT)/synonym_app ; AREAD,PRRUN,ALIST
admin_privilege = (APPROOT)/work_app; ARWRT,AREAD,PRRUN,ALIST
admin_privilege = /u1/admin/server/prod_data ; AREAD,ALIST
END
admin_group = end_user
BEGIN
admin_level = USR
admin_privilege = (APPROOT)/main_app; PRRUN,ALIST
admin_privilege = (APPROOT)/ synonym_app ; PRRUN
END
```

These security declarations define the following roles and permissions:

- A user with the ID chief_developer has full access to all applications, including main_app and synonym_app, but he has no write access to work_app for the team_developer group.

- A user that belongs to the group team_developer develops applications in his own directory but needs Read and Execute access to main applications to see what was done before. A user with this role has read-only access to production data in /u1/admin/server/prod_data. When the developer user is finished, the chief_developer copies his procedures to the main_app.

- The end_user group contains end users who need to execute the procedures from the main_app, but do not need to see synonym_app on the Web Console.

**Reference:** Access Control vs. APP PATH

APP PATH defines two main aspects of the system:

- Search path for applications at run time for one part file reference such as TABLE FILE CAR.

- List of applications shown on the Web Console and Data Management Console (DMC) application tree for the Application page.

The privileges are on the physical directories, not the application, so if the application is mapped to a different directory, the privileges from the new directory will be in effect.
Note that with Access Control, all such access is subject to Access Control rules which take precedence over APP PATH:

- A one-part file reference that searches APP PATH and finds a file in a directory without access will skip it and search further in APP PATH.

- A two-part file reference or FILEDEF attempting to access a file or directory without permission will produce an error.

- The Web Console and DMC will gray out actions such as saving a procedure or synonym where they are prohibited.

For example, user u1 has the following in his profile where both app1 and app2 contain file xxx.mas, and f1.fex:

**APP PATH app1 app2 app3,**

In admin.cfg for user u1, access to these applications defined as:

```
admin_privilege = /u1/app1; AREAD, PRRUN
admin_privilege = /u1/app2; PRRUN
admin_privilege = /u1/app3; ARWRT, AREAD, PRRUN
```

When user u1 tries to execute the FOCEXEC f1 (EX f1), the one from app1 will be executed.

When user u1 tries to issue TABLE FILE xxx, the app1/xxx.mas will be opened, since it only needs Execute privileges.

When user u1 issues the following command, the app1/xxx.mas will be opened, since it requires Read privileges:

```
EDAGET MASTER, xxx, T, ANY
```

When user u1 tries to issue the following command ENCRYPT FILE XXX, the app1/xxx.mas will be read, and an attempt to rewrite it in place will be made. Since user u1 does not have sufficient privileges, an error will occur and an error message will be issued.

Protection against hacking

- The admin.cfg file itself cannot be accessed with a WebFOCUS command. This rule is enforced in the code.

- All files that are not covered by explicitly registered privileges are covered by the system wide default.
Permissions for FOCCACHE and EDATEMP

EDATEMP is a location where the server creates temporary files during agent connection. All of these files are deleted on disconnect to provide a clean environment for the next connection.

FOCCACHE stores temporary files during execution of one Web session. These temporary files can be stored in FOCCACHE for multiple agent connections, and data can be accessed through the Web Console and WebFOCUS Server. FOCCACHE is an internally mapped application directory to a unique physical location for each Web session.

Both of these locations have a full set of permissions for a connected user unless the default location has been overridden by HOLDDATA, HOLDMETA, and remapping of FOCCACHE from its default location using APP commands. In this case, the access controlled permissions are applied based on the admin role, group, or user.

Access Control Implications For Scheduling

The DataMigrator scheduler initiates requests based on procedures (flows) with scheduling headers that it finds in the application path. The procedures are submitted for execution using the user ID and related profiles that depend on the value of the sched_run_id keyword. If the option is set to the following value, the effective server administrator ID is used:

`sched_run_id = server_admin_id`

If the option is set to the following value, the user ID found in the flow is used:

`sched_run_id = user`

The encrypted password is taken from the admin.cfg file. If the user is registered without a password, trusted connection is used for the LDAP and OPSYS security modes on all operating systems except Windows.

If the installation has a large number of users, it is good practice to protect which procedures the users are allowed to schedule. The method to accomplish this is to define a special application directory, for example `schedule_app_1`, that contains process flows with scheduling headers only. The actual procedures can be in any other application directory including a home directory, for example `app2`. The process flows will contain references to the actual procedures, for example:

`EX app2/myrpoc`

A special scheduling directory such as `schedule_app_1` can be protected with file access privileges so that only a designated user ID, for example user1, can write to it and create and modify schedules in it. The user1.prf profile should have app1 in its application path.

The scheduler is configured to scan this application directory by setting the following keyword:
This ensures that only the schedules located in `schedule_app_1` are in effect and that `user1` is the only user controlling the scope of scheduling.

**File Permissions for an OPSYS Security Provider**

Impersonation is when the server executes code in the context of an authenticated and authorized user. Access to files is controlled by the operating system security features in the native file systems. Files are protected according to the permissions set for the impersonated user.

Users who have server privileges to make configuration changes (update configuration files such as `edaserve.cfg`, `admin.cfg`, `odin.cfg`, or `edasprof.prf`) must also have operating system privileges to update those files.

The main file areas within a configuration are organized into four locations:

- **EDAHOME** (the software installation structure).
- **EDACONF** (the specific software configuration structure).
- **APPROOT** (the file structure for holding application-related programming files).
- **EDATEMP** (the runtime user area for server processes, which is normally located under the EDACONF area).

Permissions for new files depend on how the server is installed and started.

- **On UNIX, z/OS (HFS deployment), and IBM i**, the permission mask setting of the process (umask) that started the server is inherited down to the creation of each subdirectory or file with a few exceptions, and thus defines the permissions used for object creation.

- **On z/OS (PDS deployment)**, the rules (permissions) are set by the security package (RACF, ACF/2, or Top Secret).

- **On OpenVMS**, the permission mask of the process (SET PROTECTION= /DEFAULT) that started the server is inherited down to the creation of each subdirectory or file, and thus defines the permissions used for object creation.

- **On Windows**, the permissions are inherited down from directory to subdirectory, and the permissions for any object created are taken from its parent directory. So unless specific permissions are applied at any level, default permissions will depend on where the server was installed.
Consequences for Files Under the EDAHOME/EDACONF Hierarchy

All users who are expected to use the server must have Read/Execute access to files under the hierarchies. Server administrators that share common resources (such as admin.cfg), should be members of a group that provides writable access to those resources. Non-shared resources should provide each user or group with the specific permissions required.

Consequences for Files Under the APPROOT Hierarchy

Care must be taken when defining default permissions under APPROOT directories for application administrators who will create files that need to be accessed by regular users. When application files are written under any application, they are created according to the rules of ownership and default permissions applicable to the user who signed in to the Reporting Server. Thus, application developers must share a common default group if they are to work on a shared project.

Consequences for Files Under the EDATEMP Hierarchy

In a server that runs with security OPSYS, special conditions apply to the edatemp subdirectory and its contents. The basic principle is that agent subdirectories under edatemp are owned at any given moment by the user that the agent is impersonating.

With an OPSYS provider, this means that once a user connects to an agent, he is explicitly given ownership of his agent subdirectory, regardless of which user the agent impersonated during previous connections. This ownership and the inherited permissions defines how other users can access the connected user temporary files, if at all.

On UNIX, z/OS (HFS deployment), and IBM i, the edatemp subdirectory itself is an exception because it is set up similarly to the /tmp directory. While it allows any user to add files and directories underneath, only the creator of a file can later rename or delete it. Files directly under edatemp (for example, traces) and listener subdirectories are owned by the super user (root, QSECOFR). If edatemp is pre-created or adjusted to an alternate permission, then that permission will be respected. However, be aware that edastart -cleardir will remove the edatemp directory, and therefore necessitate the repeated recreation to the desired permission.

On z/OS (PDF deployment), all temporary files created by a user are based on the rules in the Security package.

On Windows, the permissions of the parent directory of edatemp (usually EDACONF), which were applied when the server was installed, are inherited when edatemp and then the agent subdirectories are created, defining the kind of access other users have to an agent subdirectory and its contents.
Configuring General Server and Web Console Actions

An authenticated user interacts with the server using the Web Console or Data Management Console (DMC). The Server Administrator controls access to the Web Console actions permitted by assigning general privileges to roles and registering users and groups into roles.

Procedure: How to Configure General Privileges

General privileges define access to the Web Console and DMC control pages such as the Adapter and DBMS Connections configuration pages, the Metadata creation pages, the Procedure editor and Procedures and Flows Run Options page, and the Server Configuration pages.

These privileges can be reviewed or customized from the Web Console by choosing Access Control on the Web Console menu bar. General privileges can be set on the role, group and user levels. Groups and users registered under any role inherit the general privileges of that role unless they are customized on the group or user level.

Directory/File Privileges

<table>
<thead>
<tr>
<th>Role: Server Operator</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Directory/File</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Status</th>
<th>Inherit Subject</th>
<th>Inherit Directory</th>
<th>Remark</th>
</tr>
</thead>
<tbody>
<tr>
<td>C:</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>System Default</td>
<td>Role - Server Operator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>bin</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Server Operator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>apps</td>
<td>✔</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Server Operator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>homeapps</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>HOMEAAPS</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;user&gt;</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>EDAPRFU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>profiles</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>EDAPRFU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>&lt;user&gt;.prf</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>EDAPRFU</td>
<td></td>
<td></td>
</tr>
<tr>
<td>svn99</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Server Operator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>home</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>EDAHOME</td>
<td></td>
<td></td>
</tr>
<tr>
<td>bin</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>EDACONF</td>
<td></td>
<td></td>
</tr>
<tr>
<td>etc</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>System Default</td>
<td>System Default</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Users other than the Server Administrator can see their own general privileges by choosing Show My General Privileges on the My Console menu. Server Administrators do not have this option because they have full privileges to all pages of the Web Console and Data Management Console.

WebFOCUS procedures can use the CHECKPRIVS() function that, when given a privilege code (for example, NODPT), returns the value Y (yes) or N (no) depending on whether the connected user is has that privilege. For more information, see the Using Functions manual.
### General Privileges

The following table describes the general privileges.

<table>
<thead>
<tr>
<th>Privilege</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Adapters</strong></td>
<td></td>
</tr>
<tr>
<td>ADPTP</td>
<td>You can configure adapters and add DBMS connection attributes.</td>
</tr>
<tr>
<td>NODPT</td>
<td>You can disable Direct Passthru.</td>
</tr>
<tr>
<td>NOSYS</td>
<td>You can disable the ability to execute certain operating system commands.</td>
</tr>
<tr>
<td><strong>Metadata</strong></td>
<td></td>
</tr>
<tr>
<td>METAP</td>
<td>You can launch tools to create and edit metadata.</td>
</tr>
<tr>
<td>DATMG</td>
<td>Data Management (allows users to create DBMS tables for the synonym, run Quick Copy, upload to Relational Database, and re-load data).</td>
</tr>
<tr>
<td><strong>Procedures</strong></td>
<td></td>
</tr>
<tr>
<td>PRSAV</td>
<td>You can launch tools to edit procedures, upload procedures.</td>
</tr>
<tr>
<td>PRSTR</td>
<td>You can use the stress tool.</td>
</tr>
<tr>
<td>PRDFR</td>
<td>You can Schedule/Email/Submit.</td>
</tr>
<tr>
<td>PRRPT</td>
<td>You can view output, DM log and statistics, impact analysis, scheduler and flow reports.</td>
</tr>
<tr>
<td>PROUT</td>
<td>You can view log and output of submitted requests.</td>
</tr>
<tr>
<td><strong>Workspace</strong></td>
<td></td>
</tr>
<tr>
<td>WSCFG</td>
<td>You can perform server administrative functions, such as access control, server configuration and migration, scalability control, and application path control.</td>
</tr>
<tr>
<td>GRANT</td>
<td>You can grant file privileges that you have to other users.</td>
</tr>
<tr>
<td>MONIT</td>
<td>You can monitor agents, sessions, connections, and services for all users.</td>
</tr>
<tr>
<td>Privilege</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td>KILAL</td>
<td>You can kill and stop agents, sessions, connections, and services for all users.</td>
</tr>
<tr>
<td>SRVLG</td>
<td>You can view server logs and traces, and you can create Savediag.</td>
</tr>
<tr>
<td>STPSV</td>
<td>You can stop and restart the server.</td>
</tr>
<tr>
<td>RARGP</td>
<td>You can use Resource Analyzer and Resource Governor.</td>
</tr>
<tr>
<td><strong>My Console</strong></td>
<td></td>
</tr>
<tr>
<td>CHGPW</td>
<td>You can change your password.</td>
</tr>
<tr>
<td>MONUS</td>
<td>You can monitor Data Service Agents that match your user ID.</td>
</tr>
<tr>
<td>MONGR</td>
<td>You can monitor Data Service Agents that match your group ID.</td>
</tr>
<tr>
<td>KILT3</td>
<td>You can kill Data Service Agents that match your user ID.</td>
</tr>
<tr>
<td>KILGR</td>
<td>You can kill Data Service Agents that match your group ID.</td>
</tr>
<tr>
<td>APATH</td>
<td>You can change your application path (no applock).</td>
</tr>
<tr>
<td>UPROF</td>
<td>You can edit your user profile.</td>
</tr>
<tr>
<td>DBMSC</td>
<td>You can manage your own DBMS connections.</td>
</tr>
<tr>
<td>UPROF</td>
<td>You can edit your own user profile.</td>
</tr>
<tr>
<td>APROF</td>
<td>You can list application profiles.</td>
</tr>
<tr>
<td>UINFO</td>
<td>You can disable display of My Console, detailed error messages, sign-in information, list of privileges for the user, server version, console log, help, and the Privileges section of the Properties page for a file or directory.</td>
</tr>
</tbody>
</table>

**Procedure:** How to Control Access to the Web Console and DMC

Authenticated users are permitted to perform certain control operations on the Web Console, depending on their definitions in admin.cfg as Server Administrator, Application Administrator, Server Operator, Basic User, or other custom role defined on the server. Within a given role, additional administration privileges may be applied. As a result, available Web Console features may vary from site to site or between server configurations at a site.
The Web Console or DMC functions available to the user are determined by his role. If a user is not assigned a role, does not belong to a group, or the group is not registered, his access to Web Console functions is based on the default_admin_role setting.

Access to the Web Console is also affected by the security provider in effect:

**Security OPSYS.** Access to the Web Console is protected by user authentication at the operating system level.

**Security PTH.** Access to the Web Console is protected by user authentication against the admin.cfg file.

**Security DBMS.** Access to the Web Console is protected by user authentication against the selected DBMS.

**Security LDAP.** Access to the Web Console is protected by user authentication against the LDAP (or AD) server.

**Security OFF.** With security OFF, anyone can access the Web Console, with full, unrestricted use of its features.

Alternatively, if a server administrator has established an Anonymous ID, it can be used to access the Web Console, without an explicitly entered user ID. For details, see Setting an Anonymous User ID on page 89.

Access to the Web Console and DMC can be restricted for individual users or for a group of users.

1. Access the Web Console with a server administrator user ID.
2. From the Web Console menu bar, select **Access Control**.
   
   The Access Control page opens.
3. Expand a **Roles** folder.
4. Right-click a user or group and select **Properties**.
   
   The General Properties page opens.
5. Select a role from the *Inherit Privileges from* drop-down menu.

The options are:

- Server Administrator
- Application Administrator
- Server Operator
- Basic User
- None. (No access allowed.)

Select the value you want to apply. If only users defined in the admin.cfg are to be allowed access, select *None*.

**Note:** If the Server Administrator has created custom roles, they will available in the drop-down menu.

6. Click *Update*.

**Note:** If a server administrator has established an Anonymous ID, it can be used to access the Web Console without an explicitly entered ID. For more details, see *Setting an Anonymous User ID* on page 89.
Procedure: How to Minimize User Access to the Server Through the Web Console

Users need some access to the Web Console in order to execute procedures and upload files. However, you can minimize their access to the server when they are signed in to the Web Console by implementing the following steps:

1. Remove all general privileges. Set all disable privileges: NODPT, NOSYS, UINFO.
2. Set all file privileges for * to Execute and List.
3. Adjust privileges to applications so they only allow necessary actions.

When a user tries to perform an action that you have not permitted, a message displays advising the user to contact the WebFOCUS Administrator.

Procedure: How to Set the Default Administration Role

A default administration role provides access to Web Console or DMC functions and to the server for users who are not assigned a role, do not belong to a group, or whose group is not registered. It is based on a selected role.

1. Access the Web Console with a server administrator user ID.
2. From the Web Console menu bar, select Access Control.
   
   The Access Control page opens.
3. Right-click Access Control and select Settings from the context menu, or click Settings on the ribbon.
   
   The Settings page opens.
4. Select a role from the default_admin_role drop-down menu in the General section.
5. Click Apply and Restart Server.

Transferring File Permissions With the GRANT Privilege

The server administrator normally provides access control permissions for application folders to groups and users. If the server administrator issues the GRANT privilege to another security subject (role, group, or user), that security subject can then grant its own file permissions to any other security subject.

For example if user A has Read but not Write permission on folder X, he can transfer Read permission to user B. He cannot grant Write permissions to anyone.

Note that if user A loses the permission later on, user B will retain his transferred permission.
Example: Granting Permissions to Another User

In the following configuration, user pgmtst2 is an Application Administrator with the GRANT privilege:

### General Privileges

**User**: PTH\pgmtst2

<table>
<thead>
<tr>
<th>Code</th>
<th>Effective</th>
<th>Default</th>
<th>Privilege Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADPTP</td>
<td></td>
<td></td>
<td>Configure Data Adapter</td>
</tr>
<tr>
<td>NODPT</td>
<td></td>
<td></td>
<td>Disable Direct Passthru</td>
</tr>
<tr>
<td>NOEYS</td>
<td></td>
<td></td>
<td>Disable Operating System Commands</td>
</tr>
<tr>
<td>Metadata</td>
<td>✓</td>
<td></td>
<td>Launch Tools to Create/Edit/Upload Metadata</td>
</tr>
<tr>
<td>METAP</td>
<td>✓</td>
<td>✓</td>
<td>Data Management (Allows Users to Create E)</td>
</tr>
<tr>
<td>DATING</td>
<td>✓</td>
<td>✓</td>
<td>Data Management (Allows Users to Create E)</td>
</tr>
<tr>
<td>Procedures</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>PRSAV</td>
<td>✓</td>
<td>✓</td>
<td>Launch Tools to Edit Procedures, Upload Procedures</td>
</tr>
<tr>
<td>PRSTR</td>
<td></td>
<td></td>
<td>Stress Tool</td>
</tr>
<tr>
<td>PRDFR</td>
<td>✓</td>
<td>✓</td>
<td>Schedule/E-Mail/Submit</td>
</tr>
<tr>
<td>PRPT</td>
<td>✓</td>
<td>✓</td>
<td>View Output, DM Log and Statistics, Impact</td>
</tr>
<tr>
<td>PROUT</td>
<td>✓</td>
<td>✓</td>
<td>View Log and Output of Submitted Requests</td>
</tr>
<tr>
<td>Workspace</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WSCFG</td>
<td></td>
<td></td>
<td>Server Administrative functions, Access Control</td>
</tr>
<tr>
<td>GRANT</td>
<td>✓</td>
<td></td>
<td>Grant Permissions</td>
</tr>
</tbody>
</table>

User pgmtst2 has Read, Execute, and List privileges on application app06, while user pgmtst3 has no privileges on this application:

### Manage Privileges

**File/Directory**: C:\ibi\apps\app06

<table>
<thead>
<tr>
<th>Subject</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Inherit Subject</th>
<th>Inherit Directory</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Administrator</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>User - OMSYS\pei02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>User - PTH\servadmin</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>User - PTH\pei02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Server Operator</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>Role - Server Operator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Application Administrator</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>User - PTH\pgmtst2</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>Basic User</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>User - PTH\adv</td>
<td>✓</td>
<td></td>
<td></td>
<td></td>
<td>Customized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - PTH\pgmtst3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Customized</td>
<td></td>
<td></td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - None</td>
<td>*</td>
<td></td>
</tr>
<tr>
<td>NewRole</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - NewRole</td>
<td>*</td>
<td></td>
</tr>
</tbody>
</table>
Since user pgmtst2 has the GRANT privilege for this application, user pgmtst2 can edit the privileges for user pgmtst3.

Directory/File Privileges

<table>
<thead>
<tr>
<th>Directory/File</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Status</th>
<th>Inherit Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>C:</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>ibi</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>apps</td>
<td>✔</td>
<td></td>
<td></td>
<td>✔</td>
<td>Inherited</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>apps</td>
<td>✔</td>
<td></td>
<td>✔</td>
<td></td>
<td>Customized</td>
<td></td>
</tr>
</tbody>
</table>

Configuring Groups

The Server Administrator registers a group or user within a role that has a set of privileges. Users and groups can be registered for special privileges, both general privileges and file privileges. It is a good practice to assign users to groups and to control groups rather than individual users. The installation has a choice of grouping users in LDAP or using the operating system security mechanism. This grouping is external to the WebFOCUS or server software and must be accomplished by the administrators for those external products. The groups are then registered in the server, and a role is chosen for them. By default, the privileges are inherited from the role in which the group is registered.

At sign-in time, the user group is determined and the proper privileges are assigned. If the user does not belong to any registered group or role, the privileges are taken from the default role. At installation time, the default role is set to Basic User, but the server administrator can change this designation. The default role can be reset on the Access Control General Privileges pages using the default_admin_role keyword.

A group can be assigned a profile stored as groupname.prf. Group profiles support the same syntax as role profiles, which are described in Configuring Roles on page 114.

The right-click menu for a user or group enables the Server Administrator to view or edit the Application Path, General Privileges, and Directory/File Privileges. It also has selections that show, for a user, the list of group memberships, and, for a group, the list of members.

Note: Profile settings affect how groups connect to the server.

Note that for LDAP security, if the LDAP database contains the email address, it is automatically populated. This requires the ldap_user_email attribute to be set in the LDAP provider configuration.
If a user belongs to multiple groups, the server either uses the primary group privileges, allows the user to select the effective group at sign-in time, or merges the privileges from all groups. How the server handles privileges for users in multiple groups is determined by the group_profile setting in the edaserve.cfg file. You can access this setting from the Access Control page by right-clicking the top level of the Access Control tree and selecting Settings. The default value for group_profile setting is to use the primary group. If the security provider is OPSYS, the operating system determines the primary group. For LDAP, the primary group is the first group alphabetically for the user.

GRPLIST is a function that returns a group name or a list of group names (separated by colons) for the connected user. This function is supported for LDAP security with all types of connections. If the group list is empty or there is an error in the function parameters, the function returns blanks.

There are also three &vars (&FOCSECUSER, &FOCSECGROUP, and &FOCSECGROUPS) that store the connected user and its primary group or the list of all groups (if the server is configured with profile_setting=all). These variables are populated by the server and cannot be changed by the application.

**Reference:** Customizing Group Privileges

Although the recommended policy is to control groups, there may be a need to create different sets of privileges for some individual users. If a user cannot be assigned to a group or to a custom role, the user can be registered with any role, and the Server Administrator can customize the privileges as needed. The customization can include general and file privileges, application path, and DBMS connections. Such users should be kept to a minimum.

**Configuring Roles**

The server is shipped with five predefined roles that allow basic operational control. Roles are listed under Access Control on the Web Console menu bar:

The roles come with a fixed set of general privileges as follows:

- **Server Administrator.** Groups and users assigned to this role have full control of the workspace, adapters, synonyms, and procedures.

- **Application Administrator.** Groups and users assigned to this role have privileges to create synonyms and procedures and to run them.

- **Server Operator.** Groups and users assigned this role have privileges to start and stop the server and monitor and kill agents.

- **Basic User.** Groups and users assigned to this role can execute procedures.
None. Users assigned to this role have no privileges on the Web Console and Data Management Console (DMC).

The default file and directory privileges allow full access.

The Server Administrator can customize the default privileges and can create custom roles and assign them general and file privileges. The only roles that cannot be changed are the Server Administrator role, which always has full privileges, and the NONE role, which has no privileges. If the Server Administrator customizes a role, it displays with the text (Customized) next to its name on the Access Control tree.

Roles can be assigned profiles that are stored in the location identified by the $EDAPRFU variable. The profile for each role is stored as the file named rolename.prf. The following items can be controlled by a profile:

- DBMS connections that are configured on the Adapter page.

- Application path that controls the search for unqualified file names (for example, TABLE FILE CAR). The application path is configured from the Access Control page.

- Other WebFOCUS commands.

Predefined roles are assigned predefined names:

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SRV</td>
<td>Server Administrator</td>
</tr>
<tr>
<td>APP</td>
<td>Application Administrator</td>
</tr>
<tr>
<td>OPR</td>
<td>Server Operator</td>
</tr>
<tr>
<td>USR</td>
<td>Basic User</td>
</tr>
</tbody>
</table>

Note: When a user connects to the server, the role profile is executed after the server profile.

Procedure: How to Create a Custom Role

1. From the Access Control page, either click the Register Role button at the top of the page or right-click the Roles folder, and select Register Role from the context menu.
The Register Custom Role page opens.

2. Enter a name for the role, and click Apply.
   A dialog box opens informing you that a new role will be registered.
3. Click OK.
   The Activate Providers page opens.
4. You can assign privileges by right-clicking the role and selecting Directory/File Privileges or General Privileges from the context menu and checking the privileges you want to assign to this role.
5. Click Save to save the privileges.

Note:
- Once the custom role has been created, the Server Administrator can register users and groups to the role.
- The Server Administrator can create a role profile that will be executed when a user registered to this role connects to the server.
- The Server Administrator can set the custom role as default_admin_role on the Access Control/General Settings page.

Procedure: How to Set Customized Privileges for Roles
A server administrator can set selected privileges for basic users, application administrators, and server operators. Configurable options are tailored to each user group.

1. On the Web Console menu bar, select Access Control.
2. Right-click a role in the navigation pane and select General Privileges.
   The General Privilege page opens.
3. Select the check boxes for the functions you want the role to be able to perform. Configurable options vary by user group.
4. Click Save to confirm these setting.
5. Click Reset to Default Privileges if you wish to revert to the standard privileges assigned to that user group.

Registering Users and Groups in a Role

A server administrator can assign specific users the following roles: Server Administrator, Application Administrator, Server Operator, Basic User, or None. A server administrator can also create additional roles and select or deselect certain privileges for these users or groups.

The user and group roles are stored in a release independent file called admin.cfg, which is located, by default, in .../ibi/profiles. This location is defined with the server configuration parameter EDAPRFU, which is stored in the edaserve.cfg file. The admin.cfg file should not be shared between servers that run with different security providers.

When registering users and groups under an LDAP or OPSYS security provider, you can retrieve a list of groups and users from the operating system. The list can be filtered to minimize the number of candidates retrieved. The User and Group Description is retrieved when available. This feature is available on Windows, UNIX, iSeries, and zOS/USS.

Procedure: How to Register Users

This procedure assumes that the user is signed in to the Web Console as a server administrator.

1. From the Web Console menu bar, select Access Control.

   The Access Control page opens.

2. Right-click a role and select Register User from the context menu.

   The User Registration page opens, as shown in the following image.
By default, the Import From Provider button is selected.

This enables you to select a security provider and retrieve a list of users whose attributes (user ID, Description, and Email) match a pattern, and select one or more from the list to register. If you do not enter a user ID or a pattern, all users are retrieved from the security provider directory.

3. To import users from a security provider directory, select the security provider from the drop-down list, and enter values or patterns in one or more of the input fields (User ID, Description, and Email), and click Next.

A list of retrieved users opens, as shown in the following image.

User Registration

<table>
<thead>
<tr>
<th>Security Provider</th>
<th>LDAP - ldap01</th>
</tr>
</thead>
<tbody>
<tr>
<td>Inherit Privileges from</td>
<td>Server Operator</td>
</tr>
</tbody>
</table>

- override the existing registration

<table>
<thead>
<tr>
<th>User</th>
<th>Description</th>
<th>E-Mail</th>
<th>Registered Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>pmsaep</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pmsbed</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pmsesd</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pmsjas</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pmsmjb</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>pmsnse</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Click the check box next to each user you want to register.
- If you want to change the role from which the users will inherit privileges, select a role from the Inherit Privileges from drop-down list.
- If you want to override an existing registration for the selected users, check override the existing registration.
- Click Register to register the users or Back to go back to the previous page.

4. For single user registration, click Manual.

The Register User page displays with the fields needed for registering a user for providers for which the server does not have support for retrieving user and group lists from the security provider. For example, single registration is used for a DBMS provider or an OPSYS provider on z/OS PDS deployment, as shown in the following image.
If you register a user with a provider that has its own user and group directory, and the user or group you register is not in that directory, the user or group will not be able to be authenticated.

5. Select the security provider for the registration from the Security Provider drop-down list.

6. Enter the following properties.

- Enter a user ID in the User field.
- If you use domain names with the user IDs (Windows only), enter the domain name in the Domain field or select one from the drop-down menu (OPSYS only).
- Optionally, enter a description in the Description field.
- Optionally, enter an email address for the user.
- Select an administrator level from the Inherit Privileges from drop-down menu. The default options are: Server Administrator, Application Administrator, Server Operator, Basic, or None.
- Optionally, in the Password and Confirm Password fields, enter the password for the user ID. A password is only required for scheduled runs.
- Click Add and Register.
Procedure: How to Register Groups

This procedure assumes that the user is signed in to the Web Console as a server administrator.

Note that for the PTH security provider, the group first has to be created using the PTH Users and Groups Management page.

For the OPSYS, LDAP, Custom, or PTH security providers, a server administrator can assign a role to groups of users by following these steps:

1. From the Web Console menu bar, select Access Control.
   
   The Access Control page opens.

2. Right-click a role and select Register Group from the context menu.
   
   The Group Registration page opens, as shown in the following image.

   By default, the Import From Provider button is selected.

   This enables you to select a security provider and retrieve a list of groups whose attributes (user ID and Description) match a pattern, and select one or more from the list to register.

   If you do not enter a group ID or a pattern, all groups are retrieved from the security provider directory.

3. To import users from a security provider directory, select the security provider from the drop-down list, and enter values or patterns in one or more of the input fields (User ID and Description), and click Next.
A list of retrieved groups opens, as shown in the following image.

### Group Registration

- **Security Provider**: LDAP - Idap01
- **Inherit Privileges from**: Application Administrator

- **Override the existing registration**: 

  - **Back**
  - **Register**

<table>
<thead>
<tr>
<th>Group</th>
<th>Description</th>
<th>Registered Role</th>
</tr>
</thead>
<tbody>
<tr>
<td>ats</td>
<td>Advanced Technical Support</td>
<td></td>
</tr>
<tr>
<td>core_admin</td>
<td>Core Engineering Administrators</td>
<td></td>
</tr>
<tr>
<td>dev</td>
<td>Server Development</td>
<td></td>
</tr>
<tr>
<td>Directory Administrators</td>
<td></td>
<td></td>
</tr>
<tr>
<td>med</td>
<td>MedProj Administrators</td>
<td></td>
</tr>
<tr>
<td>vfw-relmg</td>
<td>WebFOCUS Release Management</td>
<td></td>
</tr>
<tr>
<td>xadmin</td>
<td>Users with admin auth on read-only MedProj servers</td>
<td></td>
</tr>
</tbody>
</table>

a. Click the check box next to each group you want to register.

b. If you want to change the role from which the groups will inherit privileges, select a role from the **Inherit Privileges from** drop-down list.

c. If you want to override an existing registration for the selected groups, check **override the existing registration**.

d. Click **Register** to register the groups or **Back** to go back to the previous page.

4. For single group registration, click **Manual**.

The **Group Registration** page displays with the fields needed for registering a group for providers for which the server does not have support for retrieving user and group lists from the security provider. For example, single registration is used for a DBMS provider or an OPSYS provider on z/OS PDS deployment, as shown in the following image.

### Group Registration

- **Manual**
- **Import From Provider**

- **Security Provider**: LDAP - Idap01
- **Group**
- **Description**
- **Inherit Privileges from**: Server Operator

If you register a group with a provider that has its own user and group directory, and the user or group you register is not in that directory, the user or group will not be able to be authenticated.
5. Select the security provider for the registration from the Security Provider drop-down list.

6. Enter the following properties.

- Enter a group ID in the User field.
- If you use domain names with the user IDs (Windows only), enter the domain name in the Domain field or select one from the drop-down menu (OPSYS only).
- Optionally, enter a description in the Description field.
- Select an administrator level from the Inherit Privileges from drop-down menu. The default options are: Server Administrator, Application Administrator, Server Operator, Basic, or None.

- Click Register.

**Procedure: How to Manage Users and Groups With PTH Security**

This procedure assumes that the user is signed in to the Web Console as a server administrator.

1. From the Web Console menu bar, select Access Control.

   The Access Control page opens.

2. Expand the Security Providers folder.

3. Right-click the PTH folder and select Manage Users/Groups.

   The PTH Users and Groups Management page opens, as shown in the following image.

   ![PTH Users and Groups Management](image)

4. You can drag users (listed on the left) to groups (listed on the right) or drag groups to users.
Note: You must click Save in order to make these changes permanent.

5. To add a user or group, click New on the appropriate pane.

For a new user, the New PTH User dialog box opens, as shown in the following image:

![New PTH User dialog box]

- a. Enter a user ID.
- b. Optionally, enter a description in the Description field.
- c. In the Password and Confirm Password fields, enter a password for the user ID.
- d. Enter an email address for the user.
- e. By default, the password never expires. If you want to set an expiration date, uncheck Password never expires.
- f. If you want to temporarily disable the account, check Account disabled.
- g. Click OK.
  The user is added to the list.
- h. Click Save.

  Note: If you do not click Save, the user will not be saved on the list.
For a new group, the New PTH Group dialog box opens, as shown in the following image:

![New PTH Group dialog box]

a. Enter a group ID.

b. Optionally, enter a group description.

c. Click Next.
   The group is added to the list.

d. Click OK.

   **Note:** If you do not click Save, the group will not be saved on the list.

6. To delete a user or group, select the ID and click Delete.

   A confirmation dialog box opens.

   a. Click OK.

   b. Click Save.

   **Note:** If you do not click Save, the user or group will not be deleted.

7. To view or change the properties of a user or group, select an ID and click Properties.

   For more information, see *How to View or Change Existing User or Group Registrations* on page 125.
**Procedure:** How to View or Change Existing User or Group Registrations

1. From the Web Console menu bar, select **Access Control**.

   **Note:** You can also view and change the properties on the *PTH Users and Groups Management* page.

   The Access Control page opens.

2. Expand a Role from the **Roles** folder.

3. Right-click the user or group whose properties you want to view or change, and select **Properties**.

   The General Properties page opens, as shown in the following image.

   ![General Properties Page](image)

4. You can change the user role by select a different role from the *Inherit privileges* drop-down menu. For more information, see *How to Configure General Privileges* on page 106.

   **Note:** If only one user is defined as a Server Administrator, you cannot change that user role.

5. Click **Update**.

   The user or group is moved to the new role.

**Procedure:** How to Unregister a User or Group

1. From the Web Console menu bar, select **Access Control**.

   The Access Control page opens.

2. Expand a Role from the **Roles** folder.

3. Right-click the user or group and select **Unregister**.

   You are prompted to confirm that you want to unregister the user or group.

4. Click **OK**.
Configuring Server Encryption

The server supports encryption of passwords in configuration files, as well as SSL encryption for the TCP/HTTP Listener and encryption of data passed between a hub server and a remote server or cluster server.

Encrypting Passwords Stored in Configuration Files

You can select an encryption algorithm for passwords stored in configuration files.

Procedure: How to Encrypt Passwords Stored in Configuration Files

1. From the Web Console menu bar, choose Access Control.
2. Click Settings on the ribbon or right-click Access Control in the navigation pane, and select Settings. Then select Encryption Settings.

   The Encryption and Decryption page opens.

3. To define the cipher used to encrypt passwords in configuration files, click the drop-down list for cfgfile_cipher and select:
   - DES for Data Encryption Standard.
   - 3DES for Triple Data Encryption Standard.
   - AES 128 bits for Advanced Encryption Standard (key size 128 bits). This is the default encryption algorithm.
   - AES 256 bits for Advanced Encryption Standard (key size 256 bits).
   - user defined program to specify your own encryption and decryption programs.

4. Click the Apply and Restart Server button.

User-Defined Password Encryption and Decryption

You can configure the Reporting Server to employ user-defined password encryption and decryption programs.

User-defined encryption and decryption are available from the Settings option on the Web Console Access Control navigation tree. Right-click Access Control (the top level of the tree to open the Access Control - Settings page. Set the parameter cfgfile_cipher to user defined program, which enables you to specify your password encryption and decryption programs by entering them in the cfgfile_cipher_encrypt and cfgfile_cipher_decrypt text boxes.
Note: If you choose to use password encryption outside the server, only the path to the decryption program needs to be specified.

In cases where a password is encrypted outside of the server, the encrypted password string (or label) must be used, instead of the password in server and adapter configurations. When user-defined program is chosen, all passwords for registered user in the admin.cfg file, all adapter connections in the edasprof.prf file (or user, group and role profiles), passphrases in the odin.cfg file, and pooled user passwords need to be encrypted using the same encryption program. They will be decrypted using the same decryption program. Remote Server connections in the odin.cfg file do not support the user-defined encryption option. If user-defined encryption is chosen, the Cluster Manager Feature should not be enabled.

Procedure: How to Set Up User-Defined Password Encryption and Decryption

1. Select Access Control from the Web Console menu bar.
2. Right-click the Access Control navigation tree and select Settings, or click Settings on the ribbon, and then select Encryption Settings.
   The Encryption and Decryption page opens.
3. Select user defined program from the cfgfile_cipher drop-down menu.
   Two additional parameters are displayed.
4. Enter the full paths to the encryption and decryption programs in the cfgfile_cipher_encrypt and cfgfile_cipher_decrypt fields respectively, as shown in the following image.

   ![Encryption and Decryption](image)

5. Click Apply and Restart Server.
Encrypting Data at Rest

When the server io_encryption setting is ON, binary, alpha, and delimited HOLD files in edatemp and foccache are encrypted. Data agent trace files (tsxxx.trc) and agent output files (tsxxx.tro) are also encrypted as a result of this setting. After encryption, the extensions for these files are .trce and troe, respectively. This prevents the user from opening these files in editors outside of the Web Console or Data Management Console. Trace files and agent output files can be viewed from the Web Console Workspace page under Traces And Logs.

To turn on the io_encryption setting, do the following:

1. On the Access Control page, either click the Settings button on the ribbon, or right-click the Access Control folder and select Encryption Settings from the context menu.

   The Encryption and Decryption page opens.

2. Select y from the io_encryption drop-down list, as shown in the following image.

   ![Encryption and Decryption](image)

   The default encryption algorithm is AES 128 bits. You can change the type of encryption using the cfgfile_cipher setting available on the same page.

3. Click Apply and Restart Server.

   This setting will be added in the edaserve.cfg configuration file.

Configuring Secure Socket Layer (SSL) Encryption for the TCP/HTTP Listener

You can enable SSL for the TCP/HTTP Listener to encrypt all traffic between the server and any client application, such as the WebFOCUS Client, a remote server, or a cluster server.

**Procedure:** How to Enable SSL

1. From the menu bar, select Workspace.

2. Open the Special Services and Listeners folder, right-click TCP/HTTP, and select Properties of HTTP.

   The Listener Configuration page opens.
3. In the Security section, select Yes (OpenSSL) or Yes (Microsoft) from the Enable HTTPS drop-down list.

Additional fields needed for SSL configuration appear.

Note that OpenSSL libraries libeay32.dll and ssleay32.dll must be in the path to enable SSL.

4. Enter the following values:

SSL_CERTIFICATE

Contains the certificate chain in order, starting with the certificate for the listener and ending with the root CA certificate. Each of these entries must be in PEM format.

Note that the administrator at the installation site must acquire valid security certificates (self signed or commercial).

SSL_PRIVATE_KEY

Defines the file that contains the private key of the listener. It must correspond to the public key embedded within in the certificate and must be in PEM format.

SSL_PASSPHRASE_E

If the file defined in SSL_PRIVATE_KEY is encrypted, a passphrase must be provided here to decrypt the private key.
SSL_CA_CERTIFICATE

Defines the name of a file containing a trusted CA certificate in PEM format. It is used to verify the client certificate. If the client fails to send a certificate or verification fails, connections are rejected. More than one CA certificate may be present in the file.

5. Click the Save and Restart Server button.

Support for OpenSSL Ciphers and DH and ECDH Key Exchange

The following parameters are supported in the edaserve.cfg configuration file to support OpenSSL ciphers and Diffie-Hellman (DH) and Elliptic Curve Diffie-Hellman (ECDH) key exchange.

ssl_ciphers

Configures the list of supported cipher strings. For example, the following is the default.

`ALL:!ADH:!LOW:!EXP:@STRENGTH`

ssl_dhparams_file

Specifies the full path to the Diffie-Hellman (DH) parameters file. To create a DH key exchange with key size 1024 bits, issue the following command.

`openssl dhparam -outform PEM -out dHParam.pem 1024`

ssl_ecdhcurve

Specifies a curve name for a specific Elliptic Curve Diffie-Hellman key exchange. To list all available curves, issue the following command.

`openssl ecparam -list_curves`

Configuring Data Encryption for a Remote Server

You can enable encryption of data passed between the server and a remote server or cluster server.

Procedure: How to Configure Data Encryption for a Remote Server

1. You can access the Remote Server Configuration page by selecting Adapters on the Web Console menu bar. Remote Servers is an item in the Available folder.

2. Right-click Remote Servers on the Adapter page and select Configure.
The Remote Server Configuration page opens.

3. Click the **ENCRYPTION** drop-down list for and select:

- **0** for no encryption.

- **DES** for 56-bit fixed-key Data Encryption Standard in Electronic Code Book (ECB) mode. The same key is used in all connections with no key exchange between client and server.

- **ADVANCED** to select an encryption cipher (3DES, AES128, AES192 or AES256), encryption mode (ECB or CBC), and RSA key length (512 or 1024 bits). In advanced mode, the client randomly generates a new RSA key pair (public and private keys of the specified length) and sends the public key to the server. Upon receipt of the public key, the server generates a random secret key. The length of the secret key depends on the chosen cipher strength. The secret key is encrypted with the public RSA key and sent back to the client, which decrypts it with its private RSA key. After the exchange, the client and the server both share the same secret key, and use it to encrypt and decrypt all communications between them.
The following encryption ciphers are available:

- 3DES for triple Data Encryption Standard.
- AES128 for Advanced Encryption Standard (key size 128 bits).
- AES192 for Advanced Encryption Standard (key size 192 bits).
- AES 256 bits for Advanced Encryption Standard (key size 256 bits).

The following encryption modes are available:

- ECB for Electronic Code Book mode. This is the default mode.
- CBC for Cipher Block Chaining mode.

The following RSA key lengths are available:

- 512 bits.
- 1024 bits.

- IBCRYPT for a user-defined algorithm. The key is 512-bit RSA-encrypted.

4. Click the Save button.

Encoding HTML Tags in Data

You can set the HTMLENCODE parameter to control whether HTML tags in data are encoded as plain text or HTML tags. The value ON encodes the tags as plain text so that the browser does not consider them to contain executable code. This prevents an attack on the server by inserting executable code into data. You can set the value of HTMLENCODE to ON on the server Miscellaneous Settings page, available from the Workspace tab of the Web Console. Doing so places this setting in edasprof and enforces it server wide.

**Note:** You can store the value in edaserve.cfg using the *Miscellaneous Settings* option of the *Workspace SET* button on the Workspace page, as described in *Miscellaneous Settings* on page 501.

Access to Connection Information in WebFOCUS Procedures

The WebFOCUS Client can pass a browser cookie or HTTP header to the Reporting Server for use in WebFOCUS procedures.
The following server built-in functions can be used to retrieve this information and use it in a procedure.

- The GETCOOKI function can be used to retrieve the browser cookie value.
- The GETHEADR function can be used to retrieve variable values from the HTTP header.

For more information about WebFOCUS functions, see the *Using Functions* manual.

In addition, three Dialogue Manager system variables contain connection information.

- &FOCSECUSER returns the user ID of the connected user,
- &FOCSECGROUP returns the primary group ID for the connected user, if there is one.
- &FOCSECGROUPS returns the list of group IDs for the connected user.
  
  **Note:** The length limit of the returned list is 4000 characters.

### Configuring the Server for Multi-Tenant Deployment

In multi-tenant software architecture, each tenant (client) shares certain computing resources and application code with other tenants. In addition, each client has its own individual resources that are logically isolated from those belonging to other tenants. Metadata associates each resource with the correct tenant.

Within the server framework, in a typical setup each tenant has its own:

- Application folders.
- Groups and users.
- DBMS connections

### Configuring Multi-Tenant Application Folders

The main application folder for each tenant should contain its unique metadata (synonyms), uploaded data files and HOLD files, StyleSheet files, and server-based procedures. The tenant should have no access to other tenant folders. However, a tenant may have access to common installation-wide folders under approot, which is useful when metadata and utilities are shared between tenants. Nested folders under the main tenant application folder can be added as needed.
Configuring Multi-Tenant Groups and Users

Each tenant will have at least two groups. One group (registered to the application administrator role) has read/write access to the tenant folders and is able to create metadata and other files. The other group (registered to the basic role) can have only execute and list privileges on the tenant folder.

More groups can be added as needed.

It is recommended that groups and users be defined externally (in LDAP, for example) so that user provisioning, password expiration, and other administrative tasks can be done with the standard tools. However, the PTH security provider with server-maintained users and groups can be used as well.

Configuring Multi-Tenant DBMS Connections

DBMS connections can be defined for all tenants in edasprof or in the group profile for each tenant.

Configuring Security Providers for Multi-Tenant Deployment

The server administrator can give each tenant administrator the ability to add and remove users independently by configuring a separate security provider for each tenant. Appropriate LDAP server privileges can be given to selected users for each tenant. Alternatively, a single provider can be used. These setup choices are part of the LDAP configuration techniques for the site.

Naming Conventions for Multi-Tenant Deployment

A naming convention should be developed for creating application folders and groups that contain the tenant ID as a suffix or prefix. In the following example, the tenants have IDs 01 and 02, and folders and groups are named the following:

app01, app02, grp01_app, grp01_bas, grp02_app, grp02_bas

This will make administrative tasks more transparent and allow easier replication of the configuration when new tenants are created.

Configuring Application File Privileges for Multi-Tenant Deployment

It is recommended that an application named tenants be created under approot and that all application files be created under the tenants application.
Once the tenants application is created, the administrator should remove all privileges to it from the application administrator and basic roles. This will ensure that tenants do not have any access to the applications owned by other tenants:

### Manage Privileges

**File/Directory:** C:\ib\apps\tenants

<table>
<thead>
<tr>
<th>Subject</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Inherit Subject</th>
<th>Inherit Directory</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Server Administrator</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - OPSYS\b\we02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - PTH\vadmin</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - PTH\we02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td><strong>Server Operator</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Operator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td><strong>Application Administrator</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - PTH\pgmntst2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - Application Administrator</td>
<td>C:\ib\apps\tenants</td>
<td></td>
</tr>
<tr>
<td><strong>Basic User</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - PTH\advv</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - PTH\pgmntst3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - Basic User</td>
<td>C:\ib\apps\tenants</td>
<td></td>
</tr>
<tr>
<td><strong>None</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next, give each tenant group access to its own application.

For example:

Grp01_app has all file privileges registered to tenants/app01.

Grp01_bas has only execute/list file privileges registered to tenants/app01. Both tenant 01 groups have no access outside of their folder.

### Manage Privileges

**File/Directory:** C:\ib\apps\tenants\app01

<table>
<thead>
<tr>
<th>Subject</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Inherit Subject</th>
<th>Inherit Directory</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Server Administrator</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - OPSYS\b\we02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - PTH\vadmin</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td>User - PTH\we02703</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td><strong>Server Operator</strong></td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Operator</td>
<td>❌</td>
<td></td>
</tr>
<tr>
<td><strong>Application Administrator</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>User - PTH\pgmntst2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - Application Administrator</td>
<td>C:\ib\apps\tenants</td>
<td></td>
</tr>
<tr>
<td><strong>Basic User</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group - PTH\grp02_app</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
<td>C:\ib\apps\tenants</td>
<td></td>
</tr>
<tr>
<td>Group - PTH\grp01_app</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
<td>C:\ib\apps\tenants</td>
<td></td>
</tr>
<tr>
<td><strong>None</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Effect of Multi-Tenant Deployment on File Upload and HOLD Files

Uploading can be done to a designated subfolder of the tenant application. Even basic role users need write access to the upload folder.

For example:

Grp002_bas has all file privileges registered to tenants/app01/upload

Alternatively each user can use his home folder and not share the files, even with users of the same tenant.

Shared Metadata Under Multi-Tenant Deployment

The administrator may choose to share all synonyms and procedures for all tenants. A common application folder outside of the tenant application should be created with only list/execute permissions for all tenant groups. This folder is updated centrally for the whole installation. In this case, the tenant folders can be used only for upload and HOLD files.

Configuring Security Templates for Multi-Tenant Environments

Very often, multiple tenants in a multi-tenant environment have an identical security structure. Each tenant has an identical set of application folders and groups that conform to a standard naming convention that includes the tenant ID in the name of each subgroup and application folder. The folder and group setup is repeated from one tenant to the others. In most cases, tenants have no access rights outside of their main application folder.

In this type of configuration, you can establish file privileges for a model tenant and its associated groups, and dynamically apply them to other tenant groups by creating a template based on the model tenant. The template defines regular expressions that identify which actual group names should be assigned file privileges based on that template. Each group ID should match only one template.

Procedure: How to Configure Security Templates

The following steps outline the tenant management process in the Reporting Server.

1. Identify the tenant root application folder.

   The tenant root application folder can be under approot or can be a mapped application or SQL mapped folder. The application must be in the APP PATH. For example, c:\ibi\apps \tenants.

2. Set the permission for this folder to no access for all non-server administrator roles in order to prevent tenants from accessing folders assigned to other tenants.
3. Using the established naming convention, create the model tenant folder under the tenant root. Give the model tenant groups explicit access permissions to the model folder and its subfolders.

The model tenant groups must follow the tenant group structure and naming conventions established in the security software for the installation. The model group must be registered in the admin.cfg file. If the security provider is PTH, the tenant groups must also be registered in the admin.cfg file.

For example, using the departments application as the tenant root, create the sales application under the tenant root. The server administrator creates the groups sales, sales/dev, sales/basic, and any other groups needed.

In the following image, the tenant root folder is called departments, and the sales application is the model application. The sales application is not only a model, it is an existing group or tenant that must be registered, with privileges to the application departments/sales. Once you create one registration you can assume it as the model and create a template based on it:

```
Application Directories
  - foccache(Temporary)
  - ibisamp
  - baseapp
  - departments
    - sales
```

The server administrator defines the file and directory privileges for the sales, sales/dev and sales/basic groups on the sales folder and its children. These privileges will be replicated in groups for other tenants when their group ID matches one of the established template group IDs.
The following image shows that the sales group, whose role is Basic User, has been given Read, Execute, and List privileges on the sales folder:

**Manage Privileges**

<table>
<thead>
<tr>
<th>Subject</th>
<th>Read</th>
<th>Write</th>
<th>Execute</th>
<th>List</th>
<th>Inherit Subject</th>
</tr>
</thead>
<tbody>
<tr>
<td>Server Administrator</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Administrator</td>
</tr>
<tr>
<td>Server Operator</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Server Operator</td>
</tr>
<tr>
<td>Application Administrator</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
</tr>
<tr>
<td>User - PTH\pgmtst2</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
</tr>
<tr>
<td>Group - PTH\grp02_app</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
</tr>
<tr>
<td>Group - PTH\grp01_app</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Application Administrator</td>
</tr>
<tr>
<td>Basic User</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>Group - PTH\grp01_bas</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>Group - PTH\grp02_bas</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>Group - PTH\sales</td>
<td>✓</td>
<td></td>
<td></td>
<td>✓</td>
<td>Customized</td>
</tr>
<tr>
<td>User - PTH\readw</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>User - PTH\pgmtst3</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
<td>Role - Basic User</td>
</tr>
<tr>
<td>None</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Role - None</td>
</tr>
</tbody>
</table>
4. Establish a template that specifies how the model access rules are replicated to other tenants.
   
a. On the Access Control page, right-click the Templates folder and select *Register Group Template* from the context menu:

![Register Group Template](image)

The Group Template Registration page opens:
b. Enter the following values to establish the rules for deriving access control privileges for groups that match the template, and click Register:

**Template Group ID**

Is a regular expression that must contain a tagged expression. The tagged expression is used to identify a part of the model group ID that will be replaced by the corresponding characters in the actual group ID passed to the Reporting Server for the connected user.

For information about regular expressions, see *Summary of Regular Expressions* on page 142.

**Model Group**

Identifies the group that will be replicated.

**Exclude Group IDs**

Is a regular expression that identifies any group IDs that should be excluded in the template matching process.

**Replace Pattern**

Is used for admin_privilege strings to model file/directory privileges from the model group registration to a target group.

For example, the sales application has the sales/dev group that is registered with specific privileges on the sales folders. When the finance application is created, it will have a group named finance/dev that will be assigned the same privileges on the finance folders that the sales/dev group has on the sales folders. The finance groups will not be registered, but the template describes how to replace the word *sales* with the word *finance* when the group name ends with the characters /dev.

When you register the template, the following attributes are added to the admin.cfg file:
For example, the template group ID pattern (/w+)/dev specifies that any word followed by the characters /dev matches the template pattern.

The replace pattern departments\(sales\) indicates that the text sales will be replaced. If the group ID finance/dev is passed to the Reporting Server, the tagged expression in the Template Group ID will cause the characters finance to replace the characters sales in order to determine the file privileges for the connected user. Therefore, a user in the group finance/dev will inherit the privileges under the finance tenant application that the group sales/dev has under the model sales application.

To create a template that applies to the group sales, you need to make sure that you exclude other group names that start with the characters sales/ because without the exclusion, sales will match all of the templates, and it may be assigned the wrong one. The following image shows the template for the sales group:

The regular expression (/) in the Exclude Group IDs field specifies that group names that contain a slash do not match the template. For information about regular expressions, see Summary of Regular Expressions on page 142.

At this point, the system is ready to add new tenants.
To add a new tenant (for example, finance), the server administrator must create the finance application under the tenants root application. The installation must provision groups and users (that conform to the established naming conventions) in the relevant security provider, for example LDAP, OPSYS, or Custom. This is done outside of Information Builders software. The new tenant is now ready to be used. No access control for it needs to be established by the server administrator. The server will dynamically assign the access control privileges based on the model and the template.

For example, the user fbas1 (which is part of the finance group) logs on. The properties for this user show that the user has Read, Execute, and List privileges on the finance folder because the sales model group was given those privileges on the sales folder:

![Properties of departments/finance](image)

Note that the sales tenant is not visible to this user.

**Reference:** Summary of Regular Expressions

A regular expression is a string containing a tagged expression. A tagged expression is a portion of the string that will be replaced with actual characters passed to the Reporting Server in the group ID for a user.
Tagged expressions must be enclosed in parentheses. The backslash character (\) is a special character in tagged expressions. If a group ID actually contains a backslash character, you indicate that you want the backslash character to be treated as a normal character by entering two successive backslash characters (\\).

The following can be used to create the tagged expression:

```
abc
   Matches abc anywhere within the string.

(abc)
   Matches abc anywhere within the string, but the parentheses act as a tag.

[]
   Defines a character class (or set) that matches any one of the characters in the class. For example, [abc] matches the character a or b or c. The expression [x-y] matches any character from x to y.

.
   Matches any single character except newline.
\w
   Matches any word character string (alphanumeric plus "_ ").
\W
   Matches any non-word character.
\s
   Matches any whitespace character.
\S
   Matches any non-whitespace character.
\d
   Matches any digit.
\D
   Matches any non-digit character.
\t
   Matches a tab character.
```
\r
    Matches a return character.
\f
    Matches a formfeed character.
\e
    Matches an escape character.
\b
    Matches a word boundary or a backspace. For example, test\b matches test, but not testing. However, \b matches a backspace character when specified inside a class (that is, [\b]).
\B
    Requires that there is no word boundary. hello\B matches hello, but not hello there.
^ 
    Matches characters only at the beginning of the string. For example, ^abc matches abc at the beginning of the string.
$
    Matches characters only at the end of the string. For example, abc$ matches abc at the end of the string.
|
    Specifies alternative matching characters. For example, a|b matches either a or b. This metacharacter can also be used with words, for example, abc|def.
[^abc]
    Matches a character that is not in the set. [^abc ]+ will match such strings as hello, test, and perl.
\ 
    Is the escape character. For example, \* matches the * character. Use the backslash (\) character to escape (remove the special meaning of) characters that have significance in a regular expression.
(?i)
    Ignores case. For example, (a(?i)b|c) matches aB, c, and C.
You can follow any character, wildcard, or series of characters and/or wildcards with a repetition indicator:

*  
Matches 0 or more occurrences of the character sequence.

+  
Matches 1 or 0 occurrences of the character sequence.

?  
Matches 0 or more occurrences of the character sequence or the shortest match.

{}  
Is the repetition modifier.

{n}  
Matches exactly n occurrences of the character sequence.

{n,}  
Matches at least n occurrences of the character sequence.

{n,m}  
Matches at least n but not more than m occurrences of the character sequence.
Managing Applications

An application is a platform-independent repository for a group of related components, such as procedures, Master and Access Files, data files, HTML files, PDF files, and image files.

You can use a variety of application (APP) commands to control the application environment, including the application itself, its component files, and its search paths.

In this chapter:

- What Is an Application?
- Procedures and Metadata on the Application Tree
- Managing Applications and Paths
- Application Commands Overview
- Search Path Management Commands
- Application and File Management Commands
- Output Redirection Commands
- Application Metadata Commands and Catalog Metadata
- Help Information: APP HELP
- Restricting the Use of APP Commands
- Accessing Metadata and Procedures
- Allocating Temporary Files
- Temporary Space Usage and Location
- Temporary Disk Space Usage for Non-PDS Deployment
- Application Tools

What Is an Application?

An application is a platform-independent repository for a group of related components, such as procedures, Master and Access Files, data files, HTML files, PDF files, and image files. It provides an area on the server that both confers a unique identity on the application components and facilitates the sharing of components across applications in an organized manner. This construct also simplifies the process of moving a user application from one platform to another and of deploying PC-developed applications.
These components are physically grouped together on an application-by-application basis for run-time execution. This physical grouping can be within an application under a common root or a mapping to an application anywhere in the file system. The physical application or mapped name is referred to as the application name in this document. A comprehensive set of application (APP) commands are provided to control/manipulate the application components, as well as to facilitate applications that can be written and deployed to any platform.

The physical location of an application and its components is determined by a configuration parameter called approot. This parameter is set at installation time and stored in the server configuration file, edaserve.cfg. The default value is dependent on the platform, relative to the install ID home directory, where applicable, as indicated in the following chart.

Application directories can be nested. A nested application directory is an application created within a higher-level application. For more information, see Nested Application Directories on page 179.

You can also create a home application directory for each user. Providing a user home application gives each user a place where he has full control to create, change, and run his applications. For more information, see Home Application Directories for Users on page 183.

The various operating systems on which the product runs have their own behaviors for physical files and how directories or components are referenced. In addition, some are case sensitive and some are not. For example, on Windows, the files abc and ABC refer to the same file, regardless of how it is stored on disk (aBc, for example). However, on UNIX they are all different files. Additionally, z/OS under PDS deployment and OpenVMS ODS2 make file names uppercase when they are actually saved but they can generally also be referenced in lowercase or mixed case after they have been created. Some operating systems also allow spaces in file names and some do not. To co-exist within the various platforms on which the product runs, the product rules are to either always use APP commands or product tools such as the Web Console to create apps for application files (which will create them in the appropriate case), or to use lowercase names with external tools (such as mkdir myapp and vi mytest.fex), as they will save appropriately and work within the APP framework. Additionally, spaces in file names are not allowed. The use of external tools is also discouraged, as they may not act in the same way as internal tools.

Note:

- Where directories are referenced in the chart, lowercase application directories are created below the approot value. Actual application names must be lowercase and must not contain spaces. For z/OS PDS deployment, data sets are created for each component type using the approot value as the high-level qualifier.
Some server features will not work without nested applications enabled. Among those are home application and file upload.

<table>
<thead>
<tr>
<th>Platform</th>
<th>Default Value for approot</th>
</tr>
</thead>
<tbody>
<tr>
<td>z/OS PDS Deployment</td>
<td>approotvalue.appname.component_type</td>
</tr>
<tr>
<td>z/OS HFS Deployment</td>
<td>../ibi/apps</td>
</tr>
<tr>
<td>UNIX</td>
<td>../ibi/apps</td>
</tr>
<tr>
<td>Linux</td>
<td>../ibi/apps</td>
</tr>
<tr>
<td>Windows</td>
<td>../ibi/apps</td>
</tr>
<tr>
<td>IBM i (formerly known as i5/OS)</td>
<td>../ibi/apps</td>
</tr>
<tr>
<td>OpenVMS</td>
<td>[.IBI.APPS]</td>
</tr>
</tbody>
</table>

Two applications are provided during installation: a default application called baseapp and an application in which you can generate legacy sample files called ibisamp. In addition, when you connect to the server, a temporary directory called foccache is added as the first directory in the search path. When you want to be able to reuse data within the same browser session, you can store the data in the form of a HOLD, SAVE, or SAVB file in the foccache directory. As long as the browser session remains active, the files stored in the foccache directory can be referenced in requests.

Access to a particular application component can be explicit or implicit. Implicit access is dependent upon the search path in effect at the time of execution. The search path always includes the default application, baseapp. There is no need to explicitly declare this application.

You can change the search path from the Web Console, from the Data Management Console, or from within your application code. You can also change the search path temporarily to add application names to the beginning or end of an existing search path. APP commands are described briefly in Application Commands Overview on page 200 and in detail later in this chapter.
In addition to explicit APP names under APPROOT or an APP MAP command, which might look like myapp/myproc, there are also special reference names for internal locations that may be useful. They are:

<table>
<thead>
<tr>
<th>Reference Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>_edatemp</td>
<td>Current directory location. For server use this is the EDACONF edatemp agent directory (that is, ts000001, where 000001 is tscomid of the agent). For PDS Deployment, this is a temporary HFS location. For edastart -t, -x and -f uses, this is the current user directory.</td>
</tr>
<tr>
<td>_edahome</td>
<td>EDAHOME installation location.</td>
</tr>
<tr>
<td>_edaconf</td>
<td>EDACONF configuration location.</td>
</tr>
</tbody>
</table>

While the EDAHOME and EDACONF catalog locations are internally already on a server search path, special handles such as these allow you to explicitly reference names of the form _edahome/catalog/sysapps, which is one of a number of internal catalog tables.

**Note:** For platforms that support the Universal Naming Convention (UNC), you can specify a network drive for approot. The UNC must be:

- Minimally one folder below the initial shared location.
- Not contain spaces. For example:

  ```
  \\mynode\myshare\accting
  ```

### Generating Samples and Tutorials

You can generate several types of sample files and save them in an application in order to run sample procedures and test features and configurations.

The Web Console Applications page has a button named **Tutorials**, which you can click to open the **Create Tutorial Framework** page. You can also right-click an application folder and select **New**, then **Tutorials**, from the context menu.

Following is the list of available tutorials.

- WebFOCUS - Retail Demo
- WebFOCUS - Express Demo
In the past, a static application directory named IBISAMP was created and populated with a number of files. Additionally, there were Web Console and Data Management Console (DMC) folder options for selecting and creating items to be used with those products.

The IBISAMP folder is still created as part of the installation process, but it is not populated. You can create those legacy sample files by choosing Create Legacy Sample Tables and Files from the Tutorial drop-down list.

Because the change is implemented at the folder level, you can choose to continue using IBISAMP as the location for creating the legacy files, or you can select any other folder. The drop-down option for Legacy samples creates most, but not all, of the sample files that used to be in IBISAMP. Some of the prior files were actually DataMigrator-related, and those have been moved to their own tutorials.

Under z/OS PDS Deployment there are some additional restrictions. The z/OS PDS JSCOM Listener option must have been selected at installation time. The PDS JSCOM option also co-installs some HFS source files that are used by the various create options. If the HFS files for a z/OS PDS Deployment are not present, request to create a tutorial will produce a specific HFS files not found message. Note that not all tutorials are implemented for z/OS, and those will produce a not implemented message, if selected.

Procedures and Metadata on the Application Tree

The Applications menu groups all application files, including procedures, synonyms, HTML files, data flows, user functions, and other files on a single application tree. By default, files in an application are listed in order of file type. The file type is indicated by a unique icon for each type that displays to the left of the file name in the tree. However, you can sort or filter the list to generate custom views of each application.
Right-clicking an item brings up a context menu. The items you see on the context menu depend on your role and the type of file. Some items are only available to administrators or other users with administrator privileges. Some of the items on the context menu provide shortcuts to items on the *Workspace* or *My Console* menu.

**Reference:** Application Tree Icons

The following table lists the icons displayed for each type of file on the application tree.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Type of File</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Closed application directory" /></td>
<td>Closed application directory</td>
</tr>
<tr>
<td><img src="image" alt="Opened application directory" /></td>
<td>Opened application directory</td>
</tr>
</tbody>
</table>

**Metadata**

<table>
<thead>
<tr>
<th>Icon</th>
<th>Type of File</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Synonym (.mas)" /></td>
<td>Synonym (.mas)</td>
</tr>
<tr>
<td><img src="image" alt="Cluster synonym (.mas)" /></td>
<td>Cluster synonym (.mas)</td>
</tr>
<tr>
<td><img src="image" alt="Business View synonym (.mas)" /></td>
<td>Business View synonym (.mas)</td>
</tr>
</tbody>
</table>

**Procedures**

<table>
<thead>
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<th>Type of File</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Stored Procedure (.fex)" /></td>
<td>Stored Procedure (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="DataMigrator Flow (.fex)" /></td>
<td>DataMigrator Flow (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="DataMigrator Flow with IUD (.fex)" /></td>
<td>DataMigrator Flow with IUD (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="DBMS SQL Flow (.fex)" /></td>
<td>DBMS SQL Flow (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="Direct Load Flow (.fex)" /></td>
<td>Direct Load Flow (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="Direct Load Flow with IUD (.fex)" /></td>
<td>Direct Load Flow with IUD (.fex)</td>
</tr>
<tr>
<td><img src="image" alt="User Function (.fex)" /></td>
<td>User Function (.fex)</td>
</tr>
<tr>
<td>Icon</td>
<td>Type of File</td>
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<tr>
<td>------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>Scheduled Only (.fex)</td>
</tr>
<tr>
<td><strong>Documents</strong></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>HTML file (.htm, .html, .shtml, .htt, .mht, .mhtml, .cfm, .tpl, .hta, .htb)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Microsoft Excel® Document (.xls, .xlsx, .xlsb, .xht, .xltx, .xltm)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Adobe Acrobat Document (.pdf, .ai)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>XML Document (.xml, .wsd, .xsd, .wsdl, .mxml, .gcl, .xul, .dtd, .xsl, .xsit, .axl)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>JavaScript Object Notation (.json)</td>
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<td><img src="image" alt="Icon" /></td>
<td>Microsoft PowerPoint® Document (.ppt, .pptx, .pptm)</td>
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<td><img src="image" alt="Icon" /></td>
<td>Microsoft Word® Document (.doc, .docx, .docm, .dot, .dotx, .dotm)</td>
</tr>
<tr>
<td><strong>Other</strong></td>
<td></td>
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<td><img src="image" alt="Icon" /></td>
<td>SQL Script (.sql)</td>
</tr>
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<td><img src="image" alt="Icon" /></td>
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<td><img src="image" alt="Icon" /></td>
<td>Custom Page (.wcpg)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Graphics File (.jpg, .jpeg, .jpe, .svg, .jfif, .tif, .tiff, .ico, .gif, .bmp, .png)</td>
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<td><img src="image" alt="Icon" /></td>
<td>Archive File (.zip, .rar, .tar, .jar, .war)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Script File (.js, .jcs, .omi, .cbl, .hti, .jji, .vbs, .sh, .ctl, .bat, .t3i, .jcl, .ps)</td>
</tr>
<tr>
<td><img src="image" alt="Icon" /></td>
<td>Log/Trace File (.log, .trc, .hto, .t3o, .sta, .msg)</td>
</tr>
<tr>
<td>Icon</td>
<td>Type of File</td>
</tr>
<tr>
<td>------</td>
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</tr>
<tr>
<td><img src="image" alt="Configuration File" /></td>
<td>Configuration File (.cfg, .ini, .prf, .err, .nls)</td>
</tr>
<tr>
<td><img src="image" alt="Language File" /></td>
<td>Language File (.lng)</td>
</tr>
<tr>
<td><img src="image" alt="Other Document" /></td>
<td>Other Document (.prn, .dif, .fmu, .wp, .ifp, .lzx, .syl, .dmc, .tdl, .bst, .adr, .eps, .swf, .as, .trf, .idx)</td>
</tr>
<tr>
<td><img src="image" alt="MAINTAIN File" /></td>
<td>MAINTAIN File (.mpt, .mnt, .fcm, .wfm, .wri, .wxi)</td>
</tr>
</tbody>
</table>

**Reference:** Context Menu Options for the Application Directories Tree

The following options are available when you right-click the top level of the Application Directories tree:

- **New.** Enables you to create new application files. The available context menu options are:
  - **Procedure.** Opens a text box in which you can create a new FOCEXEC as text.
  - **Synonym (Create or Update).** Opens a window that enables you to configure an adapter or create a synonym.
  - **Custom Page.** Enables you to create pages that monitor the various services available from the Workspace folder, as well as run procedures.
  - **File.** Opens a text box in which you can create a new file as text.
  - **Application Directory.** Enables you to create a new application directory folder.
  - **Upload Data.** Enables you to upload a file to an application directory folder.
  - **Upload Image Files.** Enables you to upload image files to an application directory.
  - **Filter.** Enables you to customize the items that display on the application tree. Selecting any item on the context menu opens the Filter Applications Tree screen. For more information, see Filtering the Application Tree on page 191.
  - **Search Files.** Enables you to find files based on a range of search criteria. For more information, see Searching for Files on page 197.
Sort by. Enables you to sort application files by Name, Size, Type (the default), or date Modified. For more information, see Sorting the Application Tree on page 198.

If you select Sort by Size, the size in bytes of each file is indicated next to its name on the Application tree.

If you select Sort by Modified, the date each file was last modified is indicated next to its name on the Application tree.

Application Preferences. Enables you to customize the tree display. The available options are:

- Show sub-directories last. Shows subdirectories at the bottom of the tree.
- Show Applications not in Path. Adds an Inactive Directories tree listing all of the applications not in the path to the Application Tree. When the Inactive Directories tree is displayed, the context menu option changes to Hide Applications not in Path.

Note that this option is only available for the server administrator and users with server administrator privileges. Users with these privileges can manage (add, delete, copy, move, or modify files) directories that are not in the Application Path.

- Show Statistics on Applications Tree. Shows the number of files in the directory when the mouse hovers over an application directory.

- Show Descriptions on Applications Tree. Shows the file description when the mouse hovers over a file.

- Show Application Profile. Shows the current application profile.

- Number of files per page on Application Tree. Enables you to separate the contents of a folder into pages, displaying a Next icon to page to additional files. The default is zero (0), which does not separate the contents into pages.

Application Settings. Opens the Application Settings pane.

Manage External Repository. Has the following options.

- Manage SQL Repository. Provides options to create and manage SQL repositories, allowing you to store the contents of an application folder in an SQL database.

- Manage REST Repository. Provides options to create or list and delete a REST repository.

Application Path. Opens the Application Path Configuration page under the My Console menu while leaving the Application Directories tree open in the left pane.
Create My Home. Creates the home application directory of the user. (DataMigrator or Managed Reporting license required.)

Schedule/E-mail. Enables you to view or manage events while leaving the Application tree open in the left pane. You can select Scheduler Agents or Scheduled Events.

Log and Statistics. Enable you to view various logs and statistics while leaving the Application tree open in the left pane.

Impact Analysis. Reports on your use of synonyms, columns, and procedures. The choices are Synonyms by Procedure, Procedures by Synonym, Columns by Procedure, and Procedures by Column. In addition, you can select a Summary or Detailed flow report.

Tutorials. Opens the Create Tutorial Framework page where you can create samples tables and metadata.

Data Assist. Opens a dialog box for selecting a synonym to open in the Data Assist tool that lets you edit and enhance the synonym.

SQL Wizard. Opens the Connect to Data wizard.

Upload Wizard. Opens the Upload wizard for uploading a file to the server and preparing its metadata.

Reference: Context Menu Options for an Application Directory

Like the top level of the Application Directories tree, application directory folders include New, Schedule and E-mail, and Impact Analysis options, as described in Context Menu Options for the Application Directories Tree on page 154.

Application directory folders also include the following right-click options:

Refresh. Refreshes the list of files in the application.

New. In the application directory enables you to create a new procedure, synonym, synonym using Data Assist, custom page, text file, application directory, upload data, upload image files, or tutorials.

Quick Copy. Enables you to copy data when you have configured SQL adapters.
- **Manage Files.** Opens the Manage Files pane that lists all files and applications in the selected application with their sizes, date modified, adapter type for synonym files, description, and table name, if applicable:

![Manage Files pane]

You can select one or more files and applications and click the following buttons:

- **Copy.** Copies the files to another application directory. Select the target application from the drop-down list.

- **Move.** Moves the files to another application directory. Select the target application from the drop-down list.
☑ Refresh Synonym. Updates synonyms.

☑ Delete. Deletes the files from the application directory.

☑ Cancel. Closes the Manage Files pane.

Note: If you want to overwrite existing files of the same name in the target application, check the Overwrite existing file when Copy/Move check box. Copy, move and delete also allow you to include the subfolders of an application. Subfolders are copied, moved, or deleted with all their files and subfolders.

☑ Log and Statistics. Opens the Log and Statistics page where you can view a range of log and statistics reports.

☑ Schedule and E-Mail. Opens the Scheduler Agents or Scheduled Events page for the application.

☑ Impact Analysis. Lets you run impact analysis and flow reports for the application.

☑ Copy. Copies the application directory.

☑ Delete. Deletes the application directory and is only available for application directories that you created.

☑ Cut. Cuts the application directory and is only available for application directories you created.

☑ Paste. Pastes the application directory.

☑ Rename. Opens a dialog box for renaming the application directory.

☑ Privileges. Opens the Manage Privileges pane for the selected application:
Properties. Opens the Properties pane that shows the location of the application directory, number of files in the directory, the date the directory was last modified, and the description. You can also edit the description using the text box provided.

Reference: Context Menu Options for All Files in an Application Directory

All files include the standard right-click options of Cut, Copy, Paste, and Delete. They include the Privileges option, as described in Context Menu Options for an Application Directory on page 156.

Files also include the following right-click options:

- Open. Opens the file in the editor associated with that type of file (not available for Quick Query, HTML, and Synonym).
Properties. Opens the Properties pane that shows the location of the file, the date it was last modified, the Job Type, the description, and the privileges associated with the file.

Download. When this option is selected, the file is transferred to the Downloads folder of the user. On Windows, this folder is, by default, the following directory:

C:\users\username\Downloads

If you right-click a synonym, the shortcut menu gives you a choice of Master File or Access File.

Copy. Copies the application file.

Delete. Deletes the application file and is only available for application directories that you created.

Cut. Cuts the application file and is only available for application directories you created.

Rename. Opens a dialog box for renaming the application file.

Privileges. Opens the Manage Privileges pane for the selected file.

Each user is listed under the appropriate roles, and the privileges for the role and the individual users are indicated by check marks in the relevant columns.
Right-click a user name to choose *Edit Privileges*. The File/Directory Privileges pane opens.

Check or uncheck the box in the *Effective* column to add or remove the indicated privileges for this user, and click *Apply* to save the changes.

Click *Reset to Default Privileges* to reestablish the default privileges based on the role this user was assigned.

- **Properties.** Opens the Properties pane that shows the location of the application file, the date the file was last modified, the description, and the privileges for the connected user. You can also edit the description using the text box provided.

**Reference:**  **Context Menu Options for Stored Procedures**

Stored procedures include the Schedule and E-mail, Impact Analysis, and Privileges options, as described in *Context Menu Options for the Application Directories Tree* on page 154.

Stored procedures also include the following right-click options:

- **Run.** Runs the file if it is an executable file.
Run Changing Defaults. Lets you enter values for variables and then runs the file if it is an executable file.

Run Advanced. Opens a menu containing the following options:

Submit with E-Mail. Enables you to set up email notification when the procedure starts and/or completes, and to change default values of amper variables.

Run Stress. Opens a pane that enables you to set the number of threads, the interval, and the time to keep alive the procedure when it runs. You can also choose to generate statistics and comparisons for this run.

Run Stress Deferred. Opens a pane that enables you to set the number of threads, the interval, and the time to keep alive the procedure when it runs deferred. You can also choose to generate statistics and comparisons for this run.
- **Debug.** Enable you to run the procedure in debug mode, as shown in the following image. You can step through the code, viewing the result for each line.

- **Logs.** Provides the following options:
  - **Last Log.** Displays the log from the last time the procedure was run.
  - **Last Output.** Displays the output from the last time the procedure was run.
  - **Log and Statistics.** Opens the Logs and Statistics page where you can view a range of log and statistics reports.

- **Analysis Reports.** Provides the following options:
  - **Impact Analysis.** Reports where this procedure is found and its properties.
- **Dependencies Analysis.** Displays the Dependencies Analysis page, as shown in the following image. It enables you to see the synonym(s) and other procedures that are used by the procedure.

![Dependencies Analysis](image)

- **Data Lineage.** Reports on the fields in the procedure and their properties.

**Reference:**  **Context Menu Options for DataMigrator and Direct Load Flows**

DataMigrator and Direct Load Flows include the Schedule and E-mail and Impact Analysis options, as described in *Context Menu Options for the Application Directories Tree* on page 154. They include the Run, Run Advanced, Logs, and Dependencies Analysis options, as described in *Context Menu Options for Stored Procedures* on page 161.

DataMigrator and Direct Load Flows also include the following options:

- **Submit.** Submits the flow for processing.

- **Flow Report.** Displays details about the flow, including source and target information, load options, SQL select statements, transformations, execution properties, and record logging.
Reference: Context Menu Options for Quick Queries

Quick Queries include the Schedule and E-mail and Impact Analysis options, as described in Context Menu Options for the Application Directories Tree on page 154. They also include the Run, Run Advanced, Submit with Options, and Logs options, as described Context Menu Options for Stored Procedures on page 161.

Reference: Context Menu Options for User Functions

In addition to the standard file options (Cut, Copy, Paste, Delete, and Properties), User Functions include the Test right-click option, which tests the function.

Reference: Context Menu Options for HTML Files

In addition to the standard file options (Cut, Copy, Paste, Delete, and Properties), HTML files include the Run and Logs options, as described in Context Menu Options for Stored Procedures on page 161.

HTML files also include the following options:

- **Edit.** Enables you to edit the HTML code.
- **View.** Enables you to view how the file displays in a browser.

Reference: Context Menu Options for Custom Pages

Custom Pages include the standard file options (Open, Cut, Copy, Paste, Delete, Privileges, and Properties). Custom Pages also include an Edit option.

Reference: Context Menu Options for Synonyms

Synonyms include the Impact Analysis option, as described in Context Menu Options for the Application Directories Tree on page 154. They include the Quick Copy option, as described in Context Menu Options for an Application Directory on page 156. They also include the Dependencies Analysis option, as described Context Menu Options for Stored Procedures on page 161.

Synonyms also include the following options:

- **Open.** Opens the synonym in Data Assist.
- **Edit as Text.** Opens a Master File in a text editor.
- **Edit Access File as Text.** Opens an Access File in a text editor.
- **Sample Data.** Runs a sample report against a synonym.
Data Profiling. Runs a report against a synonym listing its segments, fields, and field information, with a drill-down report to field values.

Metadata Management. Provides options to create a cluster synonym and to prepare translation files for the metadata in the synonym.

Data Management. Enables you to recreate a DBMS table, drop a table, insert sample data, delete all data, and show/modify data.

Quick Copy. Opens the Quick Copy page where you can specify the target parameters for the new synonym and table.

Custom Copy. Opens Data Assist for editing and enhancing the synonym.

Impact Analysis. Reports where this synonym is found and its properties.

Dependencies Analysis. Displays the Dependencies Analysis page. It enables you to the applications and synonyms that contain or have references to this synonym.

Managing Applications and Paths

Path management tasks are available from the Applications page, which is accessed by clicking Applications on the Web Console menu bar. The Application Directories tree displays is on the navigation pane. The ribbon includes a set of icons that provide the quickest way to initiate path management tasks. Some tasks are available from the menu bar at the top of the application tree pane.

A single click on one of the following icons is enough to get you started.

- Hide and Show tree
  Toggles the navigation pane on and off, allowing one or both panes to occupy the screen.
  Note that these icons are displayed in any context in which you might wish to toggle the navigation pane on and off.

- Refresh
  Opens a Find text box with a Search button (magnifying glass icon), Forward (>) and Backward (<) buttons, and a Search Options button. The search options are Case Sensitive, Contains search item, Starts with search item, Ends with search item, and Show only matched items.

- Refresh
Depending upon the selected context in the navigation pane, this icon refreshes the synonyms or procedures and HTML files listed in the application tree.

Note that this icon is displayed in any context in which you might wish to refresh the display of objects on the navigation pane.

**Note:** You can also right-click the Application Directories folder in both the Web Console and the Data Management Console to access the *Application Path* option.

**Creating and Mapping Applications**

Applications are designed to group related components.

- When you create a new physical application, it becomes available for addition to the search path in a selected profile.

- When you map an application name to an existing physical location outside of approot, the mapped application becomes available for inclusion in the search path of a selected profile.

Applications can be created and mapped in either the Web Console or the Data Management Console.

Application directory names must comply with the following rules:

- The maximum length is 64 characters.

- For multi-part Application directories, the total length is limited to 512 characters.
Names can contain any valid alphanumeric character except the following:

- `space character`
- `comma`
- `star character`
- `dot`
- `question mark`
- `colon`
- `less than sign`
- `double quotation mark`
- `greater than sign`
- `single quotation mark`
- `ampersand`
- `tab`
- `backslash`
- `null terminator character`
- `vertical bar`
- `slash`
- `equal sign`

Procedure: How to Create an Application

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Right-click the Application Directories folder, select New, and then Application Directory.
The Create New Application page opens.
3. Use the default Application Type, New Application under APPROOT.
4. Enter a name in the Application Name field.
5. Optionally, select the Recreate application if exists check box.

   **Warning:** Choosing this option will overwrite the existing application and any content in it.
6. Enter a description in the Description field.
7. The Add directory to APPPATH option is the default. Optionally, you can decide not to add the directory.
8. Select a position from the Position in APPPATH drop-down menu. The options are Last and First. The default is Last.
9. Select a profile from the Profile drop-down menu. For Server Administrators, the default is edasprof. For all other users, the default is the user profile.
10. Click OK.

The application is added to the Application Directories folder.

**Procedure:** How to Map an Application to a Physical Directory

You can map an application name to a physical directory anywhere in the file system. This application name can be then used in APP commands.

Application mappings can be added and deleted based on profiles from either the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Right-click the Application Directories folder, select New, and then Application Directory.

   The Create New Application page opens.
3. Select Application Mapping to Disk or SQL Repository from the Application Type drop-down menu.

![Create New Application](image)

4. Enter a name in the Application Name field.

5. Accept the default Physical location, enter a different location, or click the selector button (...) and navigate to a directory on your file system.

   For platforms other than z/OS HFS Deployment, in addition to using the selector button, you can enter the full path of the physical directory to be mapped, in the format required on your platform. (If there are spaces in the directory you are mapping, you must enclose the entire path in double quotation marks.)

   For z/OS HFS and PDS servers, in addition to using the selector button, you can enter values using the following formats:

   ```
   ext=//DD:ddname[;ext2=//DD:ddname2][...]semicolon extn=//DD:ddnamen
   ```

   where `extn` are file type extensions.

   ```
   /dir/subdir
   ```

   entered manually or using the selector button.

   For z/OS PDS servers, you can also inform the high-level qualifiers of the data set collection that comprise this application. Here is an example of the format:

   ```
   iADMIN.SRV77.MAPAPP
   ```

   where the user has the following datasets (not in approot):
6. Select New application (directory will be created) from the Map to drop-down menu, as shown in the following image.

7. Optionally, enter a description in the Description field.

8. Add directory to APPPATH is the default. Optionally, you can decide not to add the directory.

9. Select a position from the Position in APPPATH drop-down menu. The options are Last and First. The default is Last.

10. Select a profile from the Profile drop-down menu.

   For Server Administrators, the default is edasprof. For all other users, the default is the user profile.

11. Click OK.

    The mapping is added to the Application Directories folder.

**Procedure:** How to Delete an Application or the Application Mapping

Applications and application mappings can be deleted from either the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
On the Web Console, the Applications page opens.

2. Right-click the application or application mappings and select *Delete* or *Delete Mapping*, respectively.

   A confirmation dialog box opens.

3. Click *OK* to delete the application or application mapping.

   **Note:** Deleting an application mapping will delete it from any APP PATH commands that reference it, if the APP PATH command is in the same profile as APP MAP.

### Using an SQL Database to Store Application Contents

In addition to using a physical location, the contents of an application folder can also be stored in an SQL database. To use an SQL database, you must first create a new SQL Repository. After the repository is created, you can create applications mapped to the SQL Repository and store files there.

**Warning:** It is advisable to create a separate SQL Connection to use in creating an SQL Repository. If an existing SQL Connection is used, only Server Administrators or users with WSCFG privileges will be able to use the synonyms from this SQL connection in the application. This provides protection for the SQL Repository, preventing unauthorized users (without administrator privileges) from accessing the contents of the SQL Repository through a synonym.
**Procedure:**  How to Create an SQL Repository to Store Applications

You must have an adapter connection configured to an SQL database.

1. From the ribbon, click the *Manage External Repository* icon, select *Manage SQL Repository*, and then select *Create New*, or right-click the *Application Directories* folder in the navigation pane, select *Manage External Repository*, then *Manage SQL Repository*, and then *Create New*, as shown in the following image.

![Application Directories tree](image)

expand any of the folders in the Application Directories tree
The Create New SQL Repository page opens, as shown in the following image.

2. Select a configured adapter from the Adapter drop-down menu.
3. Select a connection from the Connection drop-down menu.
4. Enter a prefix in the Prefix field.
5. Optionally, select the Overwrite existing repository tables and their synonyms check box.
6. Click OK.

A warning message is displayed, as shown in the following image.

7. Click OK.
Two SQL Repository catalog tables are created with this connection, as shown in the following image.

The tables are:

prefixIOHFILETABLE

prefixIOHRECORDTABLE

Two synonyms describing the catalog tables are also created in EDACONF/catalog/IOH.

8. Optionally, click Create New Application.
The Create New Application page opens, as shown in the following image.

Procedure: How to Create an Application With SQL Content

You must have created an SQL Repository.

1. From the Applications page, right-click the Application Directories folder in the navigation pane, select New, then Application Directory.

The Create New Application page opens.
2. Select \textit{New Application under repository - DBMS (Connection name)} from the Application Type drop-down menu, as shown in the following image.

![Create New Application](image)

\textbf{Note:} The choices will include the repository, adapter type, and connection name. In this example, they are the bks repository, Adapter for Microsoft SQL Server, and CON01 connection.

3. Enter a name in the \textit{Application Name} field.

4. Optionally, select the \textit{Recreate application if exists} check box.

\textbf{Warning:} Choosing this option will overwrite the existing application and any content in it.

5. Optionally, enter a description in the corresponding field.

6. Optionally, deselect the \textit{Add directory to APPPATH} check box. The application is added to the APPPATH by default.

7. Select a position for the application from the \textit{Position in APPPATH} drop-down menu. The choices are \textit{Last} or \textit{First}. The default value is \textit{Last}.

8. Select a profile from the \textit{Profile} drop-down menu. For server administrators, the default value is \textit{edaprof}. For non-administrators, their user profile is the default value.

9. Click \textit{OK}.

The application is added to the navigation tree. You can now use this application to store procedures, synonyms, data files, and other content.
**Note:** Repository procedures can be executed, and Master and Access Files stored in a repository can be accessed, during server, group, and user profile execution after all DBMS connections and an APP MAP command to the repository have been executed.

**Nested Application Directories**

A nested application directory is one created within a higher-level application. The server allows five levels of nested application directories by default. The server must be configured for deeper or unlimited levels.

Nested application directories are implicitly added to the application path if the parent directory is on the application path.

For example, the following application tree has a directory named new1 that has a child directory named new2.

The APP PATH command explicitly places new1 on the application path:

```plaintext
APP MAP new1 "C:\ibi\apps\new"
APP PATH baseapp ibisamp new1
```
However, you can test the path to see all of the implicitly added directories by right-clicking the top level of Applications Directories tree and selecting *Application Path*. When the Application Path page opens, click *Test* in the Application Path frame:
The effective application path also includes new1/new2:

![Test Application Path]

**Procedure:** How to Set the Level of Nested Application Directories

1. From the menu bar, select Applications.
2. From the ribbon, click the Application Settings icon, or right-click the Applications folder, and select Application Settings.

   The Application Settings page opens.
3. Enter the level of nested applications in the `nested_app` field or select `y` from the drop-down menu. The default value is 5. Selecting `y` allows unlimited levels of nested applications.

![Application Settings](image)

**Note:** For z/OS servers, this setting is only applicable to directory-style applications. It is not applicable to PDS-style applications or to applications mapped as a collection of ddnames.

4. Click the **Save and Restart Server** button.

After the server restarts, you can create a new application subdirectory by right-clicking an application folder and selecting **New** and then **Application Directory** from the context menu.

**Note:** Nested applications must be in effect in order to create user home application directories. Some other server features also require nested application directories. For example, when you Upload a data file, the file is initially staged in a temporary upload directory under foccache while you make any edits or enhancements needed to the synonym. Tutorials use nested applications as well.

**Procedure:** **How to Create a Nested Application Directory**

1. From the Web Console menu bar, click **Applications**, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Right-click an application, select **New**, and then **Application Directory**.
The Create New Application Directory page opens.

3. Enter a name in the Application Name field.
4. Optionally, enter a description in the Description field.
5. Click OK.

The nested application is added to the application tree under its parent application folder.

Home Application Directories for Users

The server administrator can configure the server to allow each user to have a home application directory. Providing a user home application directory gives each user a directory where he has full control to create, change, and run his applications.

The home application for any user who is not a server administrator appears in two places on the Web Console application tree. Both of these applications point to the same physical location, so that they can be referenced in two ways. The two applications are:

- Application myhome, which is prepended to APPPATH.
- Application homeapps, which is appended to APPPATH and can be expanded to see the user home application with the user ID name, such as pgmtst1. The homeapps folder on the application tree is only available to users registered under the server administrator role.

Server administrator users have the myhome application prepended and the homeapps application appended to APPPATH. The homeapps folder can be expanded to show the home applications for all users.
The following image shows both the myhome application and the homeapps application for user pgmtst1:

```
Application Directories
  focache(Temporary)
  myhome (PTH\pgmtst1 home)
  baseapp
  ibisamp
```

The files created in home applications can be referenced in procedures as myhome/procname.fex and homeapps/pgmtst1/procname.fex

The first type of reference can be ported easily to any user. It enables you to create a common application that utilizes data stored in the home applications of users as myhome/data, so that each user can run the same procedure but get a report based on the data stored in the home application of that user.

The second type of reference enables you to run applications specific to a user, referring to the data and procedure for each user as homeapps/pgmtst1/proc1.fex and homeapps/pgmtst1/data. This type of reference can be used for testing applications before moving them to common application folders.

Home application directories should be enabled only on secured servers. If the server runs with security OFF, all users have total control of files in all applications, and the home directories will not work as designed. Nested applications must be enabled in order to create user home application directories.

The Server Administrator can monitor and manage home application directories for all users and, therefore, all user home directories are visible and in the path on the Web Console application tree when the connected user has Server Administrator privileges.

When the server is enabled for home applications, user home application directories are not created automatically. Users can create them from the Web Console Application page, or ask their server admin to create them.

Home applications can also be stored in an SQL Repository. You must first create an SQL Repository and configure the application settings homeapps parameter to point to the SQL Repository, as described in Using an SQL Database to Store Application Contents on page 173.

After a home application directory is created for a user:

- The home application is added to the users application path by the server implicitly. A user cannot remove it from the path using APP commands.
The home application directory is always first in the users active application path.

Non-server administrator users will only see their own home application on the Application tree. The server admin or a user with server admin privileges will see all user home applications. The server admin has full privileges to manage user home applications.

**Note:** This feature is available only for customers that are licensed for Managed Reporting or DataMigrator.

**Procedure:** How to Manage Home Application Directories

In order to set up home directories for individual users, nested applications must be enabled. They are enabled to five levels by default. The home directory under which user application directories will be created is set during installation. The default is `homeapps`. The homeapps directory can be changed to a different physical location on the Application Setting page. All user home directories will be nested under the home directory.

1. From the menu bar, select Applications.
2. From the ribbon, click the Application Settings icon, or right-click the Applications folder, and select Application Settings.
   
   The Application Settings page opens.
3. Check the location of the `homeapps` directory. You can set the `homeapps` parameter to point to a physical directory or to an existing SQL Repository.
4. Click the Save and Restart Server button to implement these changes.

When the server restarts, go to the Applications menu. For a user with Server Administrator privileges, a users home folder will appear under the Application Directories tree and will have all of the user home directories.

Users who do not have server administrator privileges can see their home directory under application `myhome`, which is prepended to APPPATH.

Server administrator users have the myhome application prepended and the homeapps application appended to APPPATH. The homeapps folder can be expanded to show the home applications for all users.

The following image shows the myhome application for user `pgmtst1`:
The files created in home applications can be referenced in procedures as myhome/procname.fex and homeapps/pgmtst1/procname.fex

The first type of reference can be ported easily to any user. It enables the server administrator to create a common application that utilizes data stored in the home applications of users as myhome/data, so that each user can run the same procedure but get a report based on the data stored in the home application of that user.

The second type of reference enables the server administrator to run applications specific to a user, referring to the data and procedure for each user as homeapps/pgmtst1/proc1.fex and homeapps/pgmtst1/data. This type of reference can be used for testing applications before moving them to common application folders.

Procedure: How to Store Home Applications in an SQL Repository

You must first create an SQL Repository. For information, see How to Create an SQL Repository to Store Applications on page 174.

1. From the ribbon, click the Application Settings icon, or right-click the Application Directories folder in the navigation pane, and select Application Settings, as shown in the following image.
The Application Settings page open, as shown in the following image.

2. Click the selector button (...) next to the homeapps field.

   The Select physical location dialog box opens.

3. Select SQL Repository, as shown in the following image.

4. Select a subfolder, and click OK.
The subfolder is entered in the *homeapps* field, as shown in the following image.

![homeapps field](image)

5. Click *Save and restart Server*.

Home applications that are created will now be stored in the SQL database.

**Configuring the Application Path**

The applications available for inclusion in the search path are identified by name, type, and physical location. If the *Add directory to APPPATH* check box was selected when the application was created, it was automatically added to the search path. If not, you must explicitly add it to your search path.

**Note:** You can also create profiles from the Application Path page. Profiles are the locations in which the search path is saved.

**Procedure:** **How to Configure the Application Path**

You can configure the Application Path to add or remove applications or mappings from either the Web Console or the DMC.

The User Interface for configuring the application path uses a double list.

You configure the application path from the Applications tab on the Web Console.

1. Click *Application Path* on the ribbon, or right-click the Application Directories tree and select *Application Path* from the shortcut menu.

The Application Path Configuration page opens as a double-list table. The left pane shows a list of all available applications, the right shows all applications in the active Application Path, as shown in the following image.

![Application Path Configuration](image)

2. To add an application to the application path, drag it from the Available Applications list to any position on the Application Path list.

You can move applications up or down on the path by dragging them up or down on the list.

3. To remove an application from the application path, drag it from the Application Path list to the Available Applications list.
4. When you have finished, Click **Save**.

On both lists, you can

- Search for applications using the Binocular Search.
- Customize the columns displayed, or reset the display to its default, using the View icon.

On the Application Path list, you can:

- Select a different profile.
- Preview the commands in the selected profile.
- Click the **Test** button to view the APP PATH command and the effective application path.
- Click **Save** to save your changes.

The navigation pane is updated.

**Note:** You can create a new profile on the Application path pane.

**Procedure:** How to Configure the Application Path in a User, Group, or Role Profile

The Application Path can be configured from either the Web Console or the DMC.

1. From the Web Console menu bar, click **Applications**, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. From the ribbon, click the **Application Path** icon, or right-click the **Application Directories** folder in the navigation pane, and select **Application Path**.

   The Application Path page opens.

3. From the **Profile** drop-down menu, select **New Profile**.

4. Enter a name in the **New Profile Name** field.
5. Select an option from the *Application Path* drop-down menu.

The options are:

- **Inherit from previously executed profiles**
- **Override previously executed profiles**
- **Prepend previously executed profiles**
- **Append to previously executed profiles**

6. Optionally, click **Preview** to see the profile.

7. Click **Save**.
**Procedure: How to Edit a Profile**

1. From the menu bar, select **Workspace**.
2. On the navigation pane, open the **Configuration Files** and **User/Group Profiles** folders.
3. Right-click the profile and select **Edit**.
   
   The profile opens in a text editor with its current path displayed.
4. Edit the path information and click the **Save** icon.

**Tip:** You can also edit a profile search path by selecting and saving configuration options. Follow instructions for configuring the application path.

**Filtering the Application Tree**

Filtering enables you to customize the file listings on the Application tree, displaying only the files you choose. It can be based on file name, location, statistics, type, or any combination of items matching a number of criteria.

**Procedure: How to Filter Items on the Application Tree**

You can customize the items that display on the Application Tree by filtering. Your filtering selections apply to all applications displayed in the navigation pane.

1. From the Web Console menu bar, click **Applications**.
2. Click the **Filter** icon above the navigation pane, and select **Procedures**, **Synonyms**, or **Advanced**, as shown in the following image.

   ![Filter Options](image)

   a. If you choose **Procedures**, you can display all procedures or only scheduled ones.
   b. If you choose **Synonyms**, you can display all synonyms or only cluster or business views.
c. If you choose Show edahome, edaconf, edaprfu, scaroot, edatemp and foccache of all users, the server administrator and users with administrator privileges will see these internal locations as applications for all users.

d. If you choose Advanced, The Filter Applications Tree page opens

Using the File Name section, you can filter by name, extension, description and content, as shown in the following image. To filter the name, you can use the percent sign (%) as a wildcard character. Specifying e% displays all files whose name begins with the letter e.
3. Using the File Location section, you can filter by Application Directory, Application Path, Mapped Applications, and Applications under APPROOT, as shown in the following image.

**Filter Applications Tree**

- **File Name**
  - File Name: [Sample: dm%]
  - File Extension: [Sample: txt]
  - File Description: [Sample: my desc]
  - File Content: [Sample: my text]

- **File Location**
  - Only Application Directory: [Enter]
  - Show only Files in Applications in APPPATH
  - Show Files in Mapped Applications
  - Show Files in Applications under APPROOT
4. Using the File Statistics section, you can filter by file size and modified date, as shown in the following image.
5. Using the File Type section, you can filter by type of file to be included.
6. Optionally, select an adapter from the Adapters drop-down menu. Only synonyms created with that adapter that match the filtering criteria will appear in the tree.

7. Click Set Filter. The Filter Status page confirms that the filter was set.

When a filter is applied, the Application Directories tree label includes (Filtered), as shown in the following image.

**Note:** You can remove the filter by clicking the Clear Filter button.

You can see the filter results by clicking Show Report, as shown in the following image.
Searching for Files

The Search Files tool provides a search function on the Application Tree. It can search for files using a variety of criteria, including file name, location, description, contents, statistics, and type, in an application directory or across the entire server.

To view the file search page, click the Search Files button on the Applications page ribbon, or right-click the Application Directories folder and select Search Files on the context menu.

The Search Files page opens, as shown in the following image.

![Search Files page](image)

Enter your search criteria, and click Search.

The report returned allows you to open procedures, Master Files, and displayable data in the editor.

**Procedure: How to Search for Files**

The Search Files page provides a wide range of search criteria.

1. From the Web Console menu bar, click Applications.
2. Click the Search Files icon.
   
   The Search Files page opens.
3. Select the search criteria from the File Name, File Location, File Statistics, and File Type sections.
4. Click the Search button.
The Search Results are displayed, as shown in the following image.

![Search Result](image)

**Sorting the Application Tree**

Sorting enables you to change the order in which items are listed on the application tree.

**Procedure:** How to Sort the Application Tree

1. From the Web Console menu bar, click **Applications**.
   
The Applications page opens.

2. From the ribbon, click the Sort by icon, and select a sort method.
   
You can sort by **Name, Size, Type, or Modified date**. Type is the default.

**Managing Application Files**

You can copy and move files between applications, delete them from applications, and refresh synonyms in applications. You can also copy, move, or delete subfolders from one application to another. The subfolders will be copied, moved, or deleted with all of its files and all of its own subfolders.

**Procedure:** How to Manage Application Files

1. From the Web Console menu bar, click **Applications**.

2. Right-click an application folder and select **Manage Files**.
The Manage Files page opens.

3. Select the check box next to one or more files. To select all files, click Select All.

4. Enter an application folder in the Current Application field.
   The selector (...) button opens the Select current application dialog box which allows you to navigate to the application.

5. Enter an application folder in the To Application field or click the selector button (...) and navigate to one.

6. Click Copy or Move.
   The file(s) are copied or moved to the selected application.

7. To delete files, select their check boxes and click Delete.

Procedure: How to Refresh Synonyms in an Application

1. From the Web Console menu bar, click Applications.
2. Right-click an application folder and select Manage Files.
   The Manage Files page opens.
3. Select the check box next to one or more synonyms.
   To refresh all listed synonyms in the selected application, click Select All.
4. Click *Refresh Synonym*.

   This is also available by right-clicking an application, selecting *New Synonym (Create or Update)*, choosing the *Update* option and *Refresh Synonym* on the Master File menu.

### Application Commands Overview

This topic lists the platform-independent application (APP) commands that enable you to control the application environment.

You can use the following wildcard characters in the file name and file type references for the APP commands COPYFILE, MOVEFILE, DELETEFILE, and RENAMEFILE.

- An asterisk (*) replaces any combination of characters of any length (including zero).
- Note that an asterisk can also be used to replace the entire filename or filetype parameter.
- A question mark (?) replaces zero or one character.

**Reference:** [APP Commands Quick Reference](#)

Click any command in the following charts to access detailed information, including the required syntax.

### Search Path Management Commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APP PATH</strong></td>
<td>Sets or resets the application search path.</td>
</tr>
<tr>
<td><strong>APP PREPENDPATH</strong></td>
<td>Temporarily adds application names to the beginning of an existing APP PATH search path.</td>
</tr>
<tr>
<td><strong>APP APPENDPATH</strong></td>
<td>Temporarily adds application names to the end of an existing APP PATH search path.</td>
</tr>
<tr>
<td><strong>APP MAP</strong></td>
<td>Defines a virtual application that points to a physical location outside of the approot structure. This command makes the virtual application available for addition to the search path. It does not automatically add it to the APP PATH.</td>
</tr>
<tr>
<td><strong>APP SET METALOCATIONSAME</strong></td>
<td>Indicates whether corresponding Master and Access files must be in the same application directory.</td>
</tr>
</tbody>
</table>
### Command Description

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP ? METALLOCATION_SAME</td>
<td>Retrieves the value of APP SET METALLOCATION_SAME.</td>
</tr>
<tr>
<td>APP SHOWPATH</td>
<td>Lists all the currently active applications in the search path.</td>
</tr>
</tbody>
</table>

### Application Management Commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP COPY</td>
<td>Copies the contents of one application to a second application.</td>
</tr>
<tr>
<td>APP CREATE</td>
<td>Creates an application under the approot location.</td>
</tr>
<tr>
<td>APP DELETE</td>
<td>Deletes an application.</td>
</tr>
<tr>
<td>APP MOVE</td>
<td>Moves the contents of one application to a second application.</td>
</tr>
<tr>
<td>APP PROPERTY CODEPAGE</td>
<td>Specifies a code page for files in an application.</td>
</tr>
<tr>
<td>APP RENAME</td>
<td>Renames an application.</td>
</tr>
</tbody>
</table>

### File Management Commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP COPYF[ILE]</td>
<td><em>Copies a single component or component type from one application to another.</em></td>
</tr>
<tr>
<td>APP MOVEF[ILE]</td>
<td><em>Moves a single component or component type from one application to another.</em></td>
</tr>
<tr>
<td>APP RENAMEF[ILE]</td>
<td><em>Renames a single component or component type in an application.</em></td>
</tr>
<tr>
<td>APP DELETEF[ILE]</td>
<td><em>Deletes a single component or component type from an application.</em></td>
</tr>
</tbody>
</table>
* The shortened form of the APP commands is used in the remainder of this document.

## Output Redirection Commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APP HOLD</strong></td>
<td>Controls where output files are created for any HOLD, SAVE, SAVB, CREATE SYNONYM, or APP QUERY HOLD process in the application, unless a FILEDEF command has been used to allocate data files.</td>
</tr>
<tr>
<td><strong>APP HOLDDATA</strong></td>
<td>Designates an application as the location for temporary data files created with the HOLD, SAVE, or SAVB command.</td>
</tr>
<tr>
<td><strong>APP HOLDMETA</strong></td>
<td>Designates an application as the location for temporary Master and Access Files created with the HOLD command.</td>
</tr>
<tr>
<td><strong>APP FI[LEDEF]</strong></td>
<td>This command has been deprecated and aliased to FILEDEF.</td>
</tr>
</tbody>
</table>

## Help Commands

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Help Information: APP HELP</strong></td>
<td>Displays a list of APP commands with a brief description of each.</td>
</tr>
</tbody>
</table>

### Reference: Application Metadata Commands and Metadata Tables

Click any command in the following chart to access detailed information, including the required syntax.

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>STATEapp/file.extension</strong></td>
<td>Check file existence</td>
</tr>
</tbody>
</table>
### Command Table

<table>
<thead>
<tr>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>APP LIST</strong> app [HOLD]</td>
<td>Lists the applications under approot. If the HOLD option is used, it lists the applications under approot and writes the output to a temporary file called focappl.ftm, which you can then use in a report request.</td>
</tr>
<tr>
<td><strong>APP QUERY</strong> app [HOLD]</td>
<td>Lists all files in the application. If the HOLD option is used, it lists all files in the application and writes the output to a temporary file called focappq.ftm, which you can then use in a report request.</td>
</tr>
<tr>
<td>catalog/sysfiles</td>
<td>Table, list of accessible app name objects on path for a given type (default MASTER).</td>
</tr>
<tr>
<td>catalog/sysdirs</td>
<td>Table, recursive list of physical files under a physical directory.</td>
</tr>
<tr>
<td>catalog/sysapps</td>
<td>Table, metadata for physical objects on path.</td>
</tr>
<tr>
<td>catalog/systables</td>
<td>Table, app name of tables (and related metadata) on path.</td>
</tr>
</tbody>
</table>

### Search Path Management Commands

The server has a default search path for application and system components. You can supplement this search path by using one or more of the following APP commands:

- APP PATH
- APP PREPENDPATH
- APP APPENDPATH
- APP SET METALLOCATIONSAME
- APP ? METALLOCATIONSAME

Generally, these commands add applications to the beginning of the default search path. The exception is temporary components that are created in the current session. These temporary components are searched first, before the user defined path.
You can issue the APP PATH command manually or set the application search path from the Web Console or the Data Management Console. When you configure the application path from the Web Console or the Data Management Console, the APP PATH command is stored in a selectable profile (global, group, or user). The global profile, edasprof, is the default.

**APP PATH**

The APP PATH command sets the search path to a designated list of application names that refer to applications under the approot value. You can specify multiple application names to extend the search path.

**Syntax:**

**How to Add an Application to the Search Path Manually**

```
APP PATH app1[/] [app2[/] ...]
[appn[/>]]
```

where:

`app1...appn`

Are application names. If you follow an application name with a slash (/), nested applications (the subtree of applications below the named application) will not be in the search path. If you do not follow the application name with a slash, the `nested_app` parameter in the edaserve.cfg file determines whether nested applications are searched for files referenced in a procedure, and to what level. If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and code more application names on the next line.

**Note:**

- You can use the APP PATH command without an application name to reset the search path to the initial list.
- APP PATH does not validate the application list.

**APP PREPENDPATH**

The APP PREPENDPATH command enables you to temporarily add application names to the beginning of an existing APP PATH search path.

If you wish to use this command to alter the search path, you must code it manually in your application.
**Syntax:** How to Add Application Names to the Beginning of a Search Path

```plaintext
APP PREPENDPATH app1[/] [app2[/]] ... [appn[/]]
```

where:

```
app1...appn
```

Are application names. If you follow an application name with a slash (/), nested applications (the subtree of applications below the named application) will not be in the search path. If you do not follow the application name with a slash, the `nested_app` parameter determines whether nested applications are searched for files referenced in a procedure, and to what level. If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and code more application names on the next line.

**APP APPENDPATH**

The APP APPENDPATH command enables you to temporarily add application names to the end of an existing APP PATH search path.

If you wish to use this command to alter the search path, you must code it manually in your application.

**Syntax:** How to Add Application Names to the End of a Search Path

```plaintext
APP APPENDPATH app1[/] [app2[/]] ... [appn[/]]
```

where:

```
app1...appn
```

Are application names. If you follow an application name with a slash (/), nested applications (the subtree of applications below the named application) will not be in the search path. If you do not follow the application name with a slash, the `nested_app` parameter determines whether nested applications are searched for files referenced in a procedure, and to what level. If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and code more application names on the next line.
APP MAP

The APP MAP command allows you to assign an application name to a non-approot application anywhere in the file system. This application name becomes a virtual application under approot, which can be referenced in an APP PATH command and any other APP command that takes an application name as a parameter.

Note that mapping does not automatically add a directory to the path, it simply makes it available for addition to the search path.

Syntax:
How to Map a Physical File Location Outside of APPROOT Manually

APP MAP virtualname real_location

where:

virtualname

Is an application name of up to 64 characters that can later be used in an APP PATH command.

real_location

Is a real full path name or DDname in the native style of the given operating system. On UNIX, Linux, i5 and z/OS HFS Deployment, the location may be a mixed case name, but the MAP virtualname itself is always handle insensitive when used (that is, EX mymap/mytest).

Note that if the real location contains spaces, it must be surrounded by double quotation marks.

Note: On IBM i, the APP MAP command can only be used to map an IFS directory and not a QSYS library.

Example: Sample APP MAP Commands

Basic example for Windows:
APP MAP test c:\temp\test

Note that if a path name contains spaces, the name must be surrounded by double quotation marks. For example:
APP MAP test "c:\temp test"

Syntax: How to Map DDNAME Allocations

For the Unified Server (HFS and PDS deployments), the syntax for this type of mapping is
APP MAP appname file_extension=//dd:ddname;file_extension=//dd:ddname;...

where:

appname
Is the name of the application used to reference this mapping in an APP PATH, APP APPENDPATH, or APP PREPENDPATH command.

file_extension
Is one of the following valid server file extensions:

.mas
.fex
.acx
.htm
.sty
.gif
.psb

ddname
Is the ddname of the allocation you wish to map. The allocation can be performed using JCL code or a DYNAM command.

Example: Mapping DDNAME Allocations

DYNAM ALLOC FILE MYMAS DA EDAA RH.MASTER.DATA SHR REU
APP MAP APP1 MAS=//DD:MYMAS;
APP APPENDPATH APP1

By default, the server has an APP MAP command in the edasprof.prf file to map the application MVSAPP to the allocations FOCEXEC, MASTER, ACCESS, HTML, FOCSTYLE, GIF, FOCPSB. While allocations of these ddnames are not required for the APP MAP command to be valid, once the ddnames are allocated by JCL or DYNAM commands, they become available for use.

Reference: APP MAP With Universal Naming Convention (UNC)

On platforms that support Universal Naming Convention (UNC), you must use the UNC to designate a network drive to access APP directories. The UNC must:

- Be at least one folder below the initial shared location.
- Not contain spaces unless enclosed in single quotation marks. For example,

  `\mynode\myshare\acctnting`
  `'\mynode\my share\acctnting'`
**APP SET METALOCATION_SAME**

The APP SET METALOCATION_SAME command identifies whether Master Files and their corresponding Access Files must be in the same location.

**Syntax:** How to Control the Location of Synonym Files

```plaintext
APP SET METALOCATION_SAME {ON|OFF}
```

where:

- **ON**
  - Specifies that Master Files and their corresponding Access Files must reside in the same application directory. ON is the default value.

- **OFF**
  - Specifies that once the Master File for a request is located, the server will use the active search path to find the corresponding Access File.

**APP ? METALOCATION_SAME**

The APP ? METALOCATION_SAME command queries whether Master Files and their corresponding Access Files must be in the same location.

**Syntax:** How to Query Whether Synonym Files Must Reside in the Same Location

```plaintext
APP ? METALOCATION_SAME
```

If the result of this query command is ON, the server expects to find corresponding Master and Access Files in the same application directory. If the result is OFF, the server uses the active search path to find the Access File that corresponds to a given Master File.

**APP SHOWPATH**

The APP SHOWPATH command lists all the currently active applications in the search path, including baseapp, which is always last. This list mirrors the list of applications displayed in the applications tree on the navigation pane.

**Syntax:** How to List Active Applications

```plaintext
APP SHOWPATH
```
**Example:** Listing Active Applications in the Search Path

The Server is generally installed with two default applications: ibisamp (contains sample files), and baseapp (which can contain any files you create).

The APP SHOWPATH command generates the following output is:

```
ibisamp
baseapp
```

**Application and File Management Commands**

The APP commands in this section provide management options for applications and their component files.

**APP CREATE**

In general, the APP CREATE command creates an application under the approot location. The exception is a PDS deployment on a Unified Server, where an application is a physical entity and each of its component file types is stored in a separate PDS.

The APP CREATE command can create any number of applications with one command.

**Syntax:** How to Create an Application Manually

```
APP CREATE app1[/app1a...] [app2[/app2a...] ... [appn[/appna...] ] [DROP]
```

where:

- **app1...appn**
  
  Are application names under approot. The application name can be up to 64 characters.

- **app1a...appna**
  
  Are nested application directories, allowed when nested applications are configured. In order to create a nested application, the parent application must already exist.

**DROP**

Deletes an application if one already exists with the same name as the one to be created, and then creates a new application with that name. Note that any files in the pre-existing application are deleted. Without the DROP option, a message will be generated, and the pre-existing application will not be deleted or changed.
The application name may not contain spaces. If the name contains spaces, each section is understood to be a separate application. If you require a name with spaces, you must create it using another mechanism, such as the Windows Explorer. You can then use the APP MAP command to add it to APPROOT.

If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and code more application names on the next line.

The word HOLD cannot be used as an application name.

**Syntax:**

**How to Change Default Characteristics of Component File Types (PDS Deployment Only)**

If you are working on a Unified Server in PDS deployment, you can change the default characteristics of individual component file types by issuing a DYNAM SET APP command. This command controls the types of component files that are generated for the application when an APP CREATE command is issued. By default, all component file types are generated.

The syntax is

```
DYNAM SET APP FOR filetype [SKIP|CREATE] [POSTFIX aaa.bbb] [parms]
```

where:

**filetype**

- Are the component types that may be affected by this command, in uppercase: FOCEXEC, MASTER, ACCESS, HTML, GIF, FOCSTYLE, MAINTAIN, WINFORMS, ETG. You must issue a separate command for each component type you wish to affect.

**SKIP**

- Indicates that the designated file type should not be created when the APP CREATE command is issued.

**CREATE**

- Creates the designated file type when the APP CREATE command is issued. This is the default setting.

**POSTFIX**

- Specifies the lower level qualifier of the DSN (data set name) for the component type. The APPROOT value is used to complete the full DSN, which is expressed as

```
approotvalue.appname.component_type
```

The default value for component_type is `filetype.DATA`. 

**parms**

Are the allocation parameters you can set. The default parameter values are:

<table>
<thead>
<tr>
<th>File Type</th>
<th>Parameter</th>
</tr>
</thead>
<tbody>
<tr>
<td>FOCEXEC</td>
<td>RECFM VB TRKS LRECL 4096 BLKSIZE 27998 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>MASTER</td>
<td>RECFM FB TRKS LRECL 80 BLKSIZE 22000 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>ACCESS</td>
<td>RECFM FB TRKS LRECL 80 BLKSIZE 22000 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>HTML</td>
<td>RECFM VB TRKS LRECL 4096 BLKSIZE 27998 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>GIF</td>
<td>RECFM VB TRKS LRECL 4096 BLKSIZE 27998 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>FOCSYLE</td>
<td>RECFM FB TRKS LRECL 1024 BLKSIZE 27648 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>MAINTAIN</td>
<td>RECFM VB TRKS LRECL 4096 BLKSIZE 27998 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>WINFORMS</td>
<td>RECFM VB TRKS LRECL 4096 BLKSIZE 27998 SPACE 50 50 DIR 50</td>
</tr>
<tr>
<td>ETG</td>
<td>RECFM FB TRKS LRECL 80 BLKSIZE 22000 SPACE 50 50 DIR 50</td>
</tr>
</tbody>
</table>

The GIF file type creates libraries for GIF and JPG files.

---

**Example:** Changing Default Characteristics of an Application (PDS Deployment)

The following command indicates that GIF files should not be created when the APP CREATE command is issued.

```
DYNAM SET APP FOR GIF SKIP
```

The following command indicates that Procedures (FOCEXECs) should be created when APP CREATE is issued.

```
DYNAM SET APP FOR FOCEXEC TRKS SP 10 20 DIR 30
```
**APP COPY**

The APP COPY command copies the entire contents of one application to another. The target application must already exist.

**Syntax:** **How to Copy an Application**

\[\text{APP COPY } \text{app1}[/\text{app1a}...] \text{ app2}[/\text{app2a}...]\]

where:

\[\text{app1}[/\text{app1a}...]\]

Is the application being copied. It can be a nested application name.

\[\text{app2}[/\text{app2a}...]\]

Is the application to which the contents of the first application are being copied. It can be a nested application name.

**APP COPYF[ILE]**

The APP COPYF[ILE] command copies one or more components or component types from one application to another.

Note that if you copy a component manually, you can, optionally, rename it in the process.

If you copy a Master File, the corresponding Access File is also copied. However, copying an Access File (file type FOCSQL) does not automatically copy the corresponding Master File.

**Syntax:** **How to Copy an Application Component Manually**

\[\text{APP COPYF[ILE] } \text{app1}[/\text{app1a}...]\]

\[\{\text{filename1}[*]\} \text{filetype1} \text{ app2}[/\text{app2a}...]\]

\[\{\text{filename2}[*]\} \{\text{filetype2}[*]\} \text{[IFEXIST]} \text{ DROP}\]

where:

\[\text{app1}[/\text{app1a}...]\]

Is the application that contains the component to be copied. It can be a nested application name.

\[\text{filename1}\]

Are the components to be copied. Use an asterisk (*) to copy all components of file type \text{filetype1}. 
You can use the following wildcard characters in the file name and file type references.

- An asterisk (*) replaces any combination of characters of any length (including zero).

  Note that an asterisk can also be used to replace the entire filename or filetype parameter.

- A question mark (?) replaces zero or one character.

$$filetype1$$

Is the file type, in uppercase, of the component to be copied.

$$app2[/app2a...]$$

Is the application to which the named component is being copied. It can be a nested application name.

$$filename2$$

Is the component name in the target application, after the copy process. Use an asterisk (*) to propagate the file names from the source application to the target application.

$$filetype2$$

Is the component type, in uppercase, in the target application after the copy process. Use an asterisk (*) to propagate the file types from the source application to the target application.

**IFEXIST**

Ignores any component in the source application that does not exist.

**DROP**

Overwrites any component already in the target application with the same name and file type as a component being copied.

For a full list of the types of files you can copy with APP commands, see *Designating File Types for APP Commands* on page 218.

**APP MOVE**

The APP MOVE command moves the entire contents of one application to another. The target application must already exist.

**Syntax:**  

How to Move an Application

$$APP\ MOVE\ app1[/appla...]\ app2[/app2a...]$$
where:

\textit{app1[/app1a...]}  
Is the application being moved. It can be a nested application name.

\textit{app2[/app2a...]}  
Is the application to which the contents of the first application are being moved. It can be a nested application name.

\textbf{APP MOVEF[ILE]}  

The \textbf{APP MOVEF[ILE]} command moves one or more components or component types from one application to another.

Note that if you move a component manually, you can, optionally, rename it in the process.

If you move a Master File, the corresponding Access File is also moved. However, moving an Access File (file type FOCSQL) does not automatically move the corresponding Master File.

\textbf{Syntax: How to Move an Application Component Manually}

\begin{verbatim}
APP MOVEF[ILE] app1[/app1a...]
  {filename1|*} filetype1  app2 [/app2a...]
  {filename2|*} {filetype2|*} [IFEXIST] [DROP]
\end{verbatim}

where:

\textit{app1[/app1a...]}  
Is the application that contains the component to be moved. It can be a nested application name.

\textit{filename1}  
Is the name of the component to be moved. Use an asterisk (*) to move all components of file type \textit{filetype1}.

You can use the following wildcard characters in the file name and file type references.

- An asterisk (*) replaces any combination of characters of any length (including zero).
  - Note that an asterisk can also be used to replace the entire filename or filetype parameter.

- A question mark (?) replaces zero or one character.

\textit{filetype1}  
Is the file type, in uppercase, of the component to be moved.
Is the application to which the named component is being moved. It can be a nested application name.

Is the component name in the target application, after the move process. Use an asterisk (*) to propagate the file names from the source application to the target application.

Is the component type, in uppercase, in the target application after the move process. Use an asterisk (*) to propagate the file types from the source application to the target application.

IFEXIST

Ignores any component in the source application that does not exist.

DROP

Overwrites any component already in the target application with the same name and file type as a component being moved.

For a full list of the types of files you can move with APP commands, see Designating File Types for APP Commands on page 218.

APP DELETE

The APP DELETE command deletes applications under approot.

Syntax:

How to Delete an Application Manually

APP DELETE app1[/app1a...] [app2[/app2a...] ... [appn[/appna...]]]

where:

app1[/app1a...]... [appn[/appna...]]

Are application names. Nested application names are supported. If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and enter additional application names on the next line.

APP DELETEF[ILE]

The APP DELETEF[ILE] command deletes one or more components or component types from an application.
If you delete a Master File, the corresponding Access File is also deleted. However, deleting an Access File (file type FOCSQL) does not automatically delete the corresponding Master File.

**Syntax:** How to Delete an Application Component Manually

```
APP DELETEF[ILE] app[/appa...] {filename|*} filetype
```

where:

```
app[/appa...]
```

Is the application from which the component or component type is being deleted. Nested application names are supported.

```
filename
```

Is the name of the component to be deleted. Use an asterisk (*) to delete all files of type `filetype`.

You can use the following wildcard characters in the file name and file type references.

- An asterisk (*) replaces any combination of characters of any length (including zero).
  - Note that an asterisk can also be used to replace the entire filename or filetype parameter.

- A question mark (?) replaces zero or one character.

```
filetype
```

Is the component type, in uppercase, of the component to be deleted.

For a full list of the types of files you can use with APP commands, see [Designating File Types for APP Commands](#) on page 218.

**APP PROPERTY CODEPAGE**

The APP PROPERTY appname CODEPAGE command identifies the codepage to be used for non-data files in the application directory.

**Syntax:** How to Specify a Code Page for an Application

```
APP PROPERTY app[/appa...] CODEPAGE number
```

where:

```
app[/appa...]
```

Is an application name. Nested application names are supported.
number

Is the code page number for non-data files in the application.

APP RENAME

The APP RENAME command renames an existing application.

**Note:** You cannot rename an application if it is active in the search path.

**Syntax:** How to Rename an Application

```
APP RENAME app1[/app1a...] app2[/app2a...]
```

where:

```
app1[/app1a...]
```

Is the application name to be renamed. It can be a nested application name.

```
app2[/app2a...]
```

Is the new application name of up to 64 characters. It can be a nested application name.

**Example:** Renaming an Application

The following shows app1 being renamed to app2.

```
APP RENAME app1 app2
```

APP RENAMEF[ILE]

The APP RENAMEF[ILE] command renames one or more components in an application.

If you rename a Master File, the corresponding Access File is also renamed. However, renaming an Access File (file type FOCSQL) does not automatically rename the corresponding Master File.

**Syntax:** How to Rename an Application Component

```
APP RENAMEF[ILE] app[/appa...] filename1 filename2 filetype [DROP]
```

where:

```
app[/appa...]
```

Is the name of the application that contains the component being renamed. It can be a nested application name
filename1

Is the file name of the component to be renamed.

You can use the following wildcard characters in the file name and file type references.

- An asterisk (*) replaces any combination of characters of any length (including zero).
  - Note that an asterisk can also be used to replace the entire filename or filetype parameter.

- A question mark (?) replaces zero or one character.

filename2

Is the new name for the component. The component name may be up to 64 characters.

filetype

Is the file type, in uppercase, of the component to be renamed.

DROP

Overwrites an existing component with the same file name and file type.

For a full list of the types of files you can use with APP commands, see Designating File Types for APP Commands on page 218.

Designating File Types for APP Commands

The APP COPYF, APP MOVEF, APP DELETEF, and APP RENAMEF commands enable you to perform their actions on a wide variety of file types.

Reference: APP Commands and File Types

The following is a comprehensive list of the file types you can use with APP commands and the file extensions associated with the on-disk names for hierarchical file systems.

Note: This list reflects file types supported across all Information Builders products and release levels. Particular file types may not be supported in particular releases or with every product.

<table>
<thead>
<tr>
<th>File Type</th>
<th>File Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACX</td>
<td>.acx</td>
</tr>
<tr>
<td>ADR</td>
<td>.adr</td>
</tr>
<tr>
<td>File Type</td>
<td>File Extension</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>AFM</td>
<td>.afm</td>
</tr>
<tr>
<td>BMP</td>
<td>.bmp</td>
</tr>
<tr>
<td>BST</td>
<td>.bst</td>
</tr>
<tr>
<td>cascading style sheet</td>
<td>.css</td>
</tr>
<tr>
<td>CONTROL</td>
<td>.ctl</td>
</tr>
<tr>
<td>DATA</td>
<td>.dat</td>
</tr>
<tr>
<td>DDS</td>
<td>.DDS</td>
</tr>
<tr>
<td>DEFAULT</td>
<td>The APP filename value is used to derive the physical extension for the APP command, so that unknown user-defined extensions may be supported in an APP command (for example, APP COPYFILE BASEAPP MYFILE.FOO DEFAULT BASEAPP MYFILE FOCEXEC).</td>
</tr>
<tr>
<td>DTD</td>
<td>.dtd</td>
</tr>
<tr>
<td>EDANLS</td>
<td>.nls</td>
</tr>
<tr>
<td>EDAPRFU</td>
<td>.prf</td>
</tr>
<tr>
<td>EDAPROF</td>
<td>.prf</td>
</tr>
<tr>
<td>EDAPSB</td>
<td>.psb</td>
</tr>
<tr>
<td>EPS</td>
<td>.eps</td>
</tr>
<tr>
<td>ERRORS</td>
<td>.err</td>
</tr>
<tr>
<td>ETG</td>
<td>.etg</td>
</tr>
<tr>
<td>ETL</td>
<td>.etl</td>
</tr>
<tr>
<td>EXCEL</td>
<td>.xls</td>
</tr>
<tr>
<td>FMU</td>
<td>.fmu</td>
</tr>
<tr>
<td>File Type</td>
<td>File Extension</td>
</tr>
<tr>
<td>---------------------------</td>
<td>----------------</td>
</tr>
<tr>
<td>FOCCOMP</td>
<td>.fcm</td>
</tr>
<tr>
<td>FOCDEF</td>
<td>.def</td>
</tr>
<tr>
<td>FOCEXEC OR FEX</td>
<td>.fex</td>
</tr>
<tr>
<td>FOCFTMAP</td>
<td>.fmp</td>
</tr>
<tr>
<td>FOCPSB</td>
<td>.psb</td>
</tr>
<tr>
<td>FOCSQL</td>
<td>.acx</td>
</tr>
<tr>
<td>FOCSTYLE</td>
<td>.sty</td>
</tr>
<tr>
<td>FOCTEMP</td>
<td>.ftm</td>
</tr>
<tr>
<td>FOCUS</td>
<td>.foc</td>
</tr>
<tr>
<td>GIF</td>
<td>.gif</td>
</tr>
<tr>
<td>HLI</td>
<td>.hli</td>
</tr>
<tr>
<td>HTML</td>
<td>.htm</td>
</tr>
<tr>
<td>IBICPG</td>
<td>.sl</td>
</tr>
<tr>
<td>JPG</td>
<td>.jpg</td>
</tr>
<tr>
<td>JS</td>
<td>.js</td>
</tr>
<tr>
<td>LSN</td>
<td>.lsn</td>
</tr>
<tr>
<td>MAINTAIN</td>
<td>.mnt</td>
</tr>
<tr>
<td>MASTER OR MAS</td>
<td>.mas</td>
</tr>
</tbody>
</table>

MASTER has a special behavior that any matching Access File (.acx) is also operated upon by the APP command. This is so metadata is operated upon as a matched pair. Use MAS if it is strictly desired to only operate on the Master File and not the Access File.
<table>
<thead>
<tr>
<th>File Type</th>
<th>File Extension</th>
</tr>
</thead>
<tbody>
<tr>
<td>MHT</td>
<td>.mht</td>
</tr>
<tr>
<td>Microsoft Access database</td>
<td>.mdb</td>
</tr>
<tr>
<td>MNTPAINT</td>
<td>.mpt</td>
</tr>
<tr>
<td>OMI</td>
<td>.omi</td>
</tr>
<tr>
<td>PDF</td>
<td>.pdf</td>
</tr>
<tr>
<td>PFA</td>
<td>.pfa</td>
</tr>
<tr>
<td>PFB</td>
<td>.pfb</td>
</tr>
<tr>
<td>PNG</td>
<td>.png</td>
</tr>
<tr>
<td>PS</td>
<td>.ps</td>
</tr>
<tr>
<td>SMARTLIB</td>
<td>.knb</td>
</tr>
<tr>
<td>SQL</td>
<td>.sql</td>
</tr>
<tr>
<td>SVG</td>
<td>.svg</td>
</tr>
<tr>
<td>TABS</td>
<td>.txt</td>
</tr>
<tr>
<td>TDL</td>
<td>.tdl</td>
</tr>
<tr>
<td>TRF</td>
<td>.trf</td>
</tr>
<tr>
<td>TTEDIT</td>
<td>.tte</td>
</tr>
<tr>
<td>TXT</td>
<td>.txt</td>
</tr>
<tr>
<td>WINFORMS</td>
<td>.wfm</td>
</tr>
<tr>
<td>WSDL</td>
<td>.wsd</td>
</tr>
<tr>
<td>XHT</td>
<td>.xht</td>
</tr>
<tr>
<td>XLSM</td>
<td>.xslm</td>
</tr>
<tr>
<td>XLSX</td>
<td>.xlsx</td>
</tr>
</tbody>
</table>
Output Redirection Commands

Three APP commands (APP HOLD, APP HOLDDATA, and APP HOLDMETA) along with the FILEDEF and DYNAM commands comprise a class of commands that control where output is stored. In order to redirect output as you wish, it is important to understand the interactions among these commands.

**Note:** When the same behavior applies for APP HOLD, APP HOLDDATA, and APP HOLDMETA, these commands are referred to collectively as APP HOLD*. Note also that although DYNAM (USS only) and FILEDEF are not members of the APP family of commands, these file allocation commands interact with the APP HOLD* commands. Therefore, where appropriate, these commands are also included in this discussion. APP FI[LEDEF] has been deprecated and aliased to FILEDEF.

The most straightforward of these commands is APP HOLD, which allows you to relocate all output to a particular application. You can use this command with operations that produce output files, such as HOLD, SAVE and SAVB, as well as with CREATE SYNONYM and APP QUERY HOLD. (For details about HOLD, SAVE, and SAVB commands, see the *Creating Reports With WebFOCUS Language* manual.)

The APP HOLD* commands are particularly helpful when you are creating permanent files for other applications to use. However, if a command is used at an inappropriate point in the application or if it remains in effect when further steps are performed within the application, the target application may be flooded with intermediate and unintended files. Understanding the behavior of each command and the interactions among them will help you avoid this situation.
# Interactions Among Output Redirection Commands

This chart describes the behavior associated with each redirection command and the interactions among them if multiple commands are used.

<table>
<thead>
<tr>
<th>Command</th>
<th>Stand Alone</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>APP HOLD</td>
<td>Redirects all Agent output from HOLD, SAVE, SAVB, CREATE SYNONYM, and APP QUERY HOLD commands to the designated application.</td>
<td>When issued without a specific appname, APP HOLD has the effect of turning off the command.</td>
</tr>
<tr>
<td>APP HOLDDATA</td>
<td>Redirects the data from HOLD, SAVE, and SAVB operations to the designated application, but does not redirect the associated metadata (see Note 1 after chart).</td>
<td>Overrides APP HOLD.</td>
</tr>
<tr>
<td>APP HOLDMETA</td>
<td>Redirects the metadata from HOLD, SAVE, and SAVB operations to the designated application, but does not redirect the associated data (see Note 1 after chart).</td>
<td>Overrides APP HOLD.</td>
</tr>
<tr>
<td>FILEDEF ddname DYNAM ALLOC ddname</td>
<td>Redirects the data from specific HOLD, SAVE, and SAVB operations to the designated target, but does not redirect the associated metadata (see Note 1 after chart). The AS phrase must match the ddname. When there is no AS phrase, the ddname must match a predefined default name: HOLD for HOLD output files; SAVE for SAVE output files; and SAVB for SAVB output files.</td>
<td>Overrides APP HOLD and APP HOLDDATA.</td>
</tr>
</tbody>
</table>

---

**Reference:** Interactions Among Output Redirection Commands

---

Server Administration 223
**Command** | **Stand Alone** | **Notes**
--- | --- | ---
**DYNAM ALLOC HOLDMAST** | Redirects the metadata from HOLD, SAVE, and SAVB operations to the designated target (using the HOLDMAST `ddname`), but does not redirect the associated data (see Note 1 after chart). The recommended practice is to use this command on a request-by-request basis to avoid overriding previous output. If used as a global setting, previously held output will be overwritten with the same name. | Overrides APP HOLD and APP HOLDMETA.

**Note:**

- Not all formats have associated metadata. For example, the HOLD FORMAT PDF command does not produce metadata, therefore, there is no metadata to redirect.

- The use of the APP HOLD command to redirect CREATE SYNONYM output is neither necessary nor desirable since the CREATE SYNONYM command directly supports application names using the syntax:

  ```
  CREATE SYNONYM appname/synonym ...
  ```

**APP HOLD**

The APP HOLD command defines an application in which to hold output data files (and associated Master and Access Files, if applicable) created by a HOLD, SAVE, or SAVB process in the application.

APP HOLD is intended to be used to refresh files that are common for all users of the application. It should not be used for private files since it points to an application area that is used by multiple users. If the same hold name (HOLD or AS `name`, for example) is used, conflicts between users could result.

For related information, see *Interactions Among Output Redirection Commands* on page 223.
Syntax: How to Designate a Storage Location for Temporary Files

```bash
APP HOLD appname[/appnamea...]```

where:

```bash
appname[/appnamea...]```

Is the application in which you wish to store output files. It can be a nested application name.

**Note:** Issuing APP HOLD without an `appname` turns off the effects of the command.

**APP HOLDDATA**

The APP HOLDDATA command designates an application as the location for storing data files created with the HOLD command. For related information, see *Interactions Among Output Redirection Commands* on page 223.

Syntax: How to Designate a Storage Location for Data Files

```bash
APP HOLDDATA appname[/appnamea...]```

where:

```bash
appname[/appnamea...]```

Is the name of the location for the data files created by any write process in the application. It can be a nested application name.

**APP HOLDMETA**

The APP HOLDMETA command designates an application directory as the location for storing Master and Access Files created in the application. For related information, see *Interactions Among Output Redirection Commands* on page 223.

Syntax: How to Designate a Storage Location for Master and Access Files

```bash
APP HOLDMETA appname[/appnamea...]```

where:

```bash
appname[/appnamea...]```

Is the name of the location for the Master and Access Files created in the application. It can be a nested application name.
APP FI[LEDEF]

The APP FI[LEDEF] command has been deprecated and aliased to FILEDEF. For information, see the Stored Procedure Reference manual.

Application Metadata Commands and Catalog Metadata

Developers may want to write applications that check application metadata and decide a course of action. For example, they may want to check the existence of a file or a file date, and decide on the need for another step, such as recreation of the file. There are multiple ways to accomplish a simple check for file existence or some other attribute, that have evolved over the release history of the product. However, some of these methods have limitations. A good example of this is the STATE command, which uses a native path name for UNIX. This type of path name would not match a Windows or OpenVMS file path and, therefore, would require IF THEN ELSE or GOTO logic to issue the correct version of the command for the operating environment, that might be quite cumbersome, depending on how often it is needed.

To solve part of this problem, commands such as STATE, FILEDEF, and DYNAM have been extended to support APP names (that is, issue APP MAP then use STATE mymap/myproc.fex).

To deal with more complex issues, such as retrieving a list of available applications (APP names) and files within a particular application, a series of APP commands were developed (APP LIST and APP QUERY). However, as features such as nested applications (sub-directories) were implemented, it became apparent that a much more extended ecosystem for accessing application metadata was needed.

To satisfy this need for extended information, various internal tables were extended or created. Today the catalog/sysapps table is the primary method for accessing application metadata using standard TABLE or SELECT syntax. This is what is used in most internal applications. That is not to say that the prior methods are no longer supported. At times they can provide quick and simple coding for a specific need, but they have limitations (as noted). More complex situations require the use of the newer methods to access information. Additionally, tables such as catalog/systables and catalog/syscolum can provide additional information that is table specific, such as what DBMS a table is using and the data specification of particular columns, but they are beyond the scope of this section. It should also be noted that the newer methods occasionally overlap on how to accomplish a task. For example, a number of the catalog/sys* tables can be used to answer the question of whether a file exists. However, the tables differ from each other in the more detailed information, such as physical or application locations and attributes.

Retrieving Basic Information

The following commands return basic information about files and applications.
STATE

The STATE command lets you check for the existence of a file. The file reference you supply can be the full path native operating system file name, or a file name prefaced with an APP name. This section only described the use of APP name prefaced files. When an APP name is used, it does not matter if the name was natively created under the APPROOT location of the server or as an APP MAP name.

If the file does not exist, the STATE command displays a message to that effect. After issuing the STATE command, the &RETCODE system variable contains the value zero (0) if the file exists, or a non-zero value if the file does not exist.

Syntax: How to Check File Existence

```
STATE appname/filename.filetype -TYPE RETCODE &RETCODE
```

where:

- **appname**
  
  Is the application under which the file is stored.

- **filename**
  
  Is the name of the file.

- **filetype**
  
  Is the file type or extension of the file.

If the file exists, the &RETCODE value will be 0 (zero). Otherwise, it will be non-zero and can be used to further direct the logic of the application, typically in a -SET or a -IF command. The STATE command will also output a not found message. To suppress this message, use the SET TRMOUT={OFF|ON} command.

For example, the following STATE command checks the existence of the file myproc.fex in the baseapp application. The STATE command displays a message if the file does not exist. The -TYPE command displays the value zero (0) if the file exists or the value -1 if the file does not exist.

```
STATE baseapp/myproc.fex
-TYPE RETCODE &RETCODE
```
Example: Checking the Existence of a File With the STATE Command

The following partial example suppresses the message returned by the STATE command, issues the STATE command to check if the file myproc.fex exists in the baseapp application, checks the return code, and creates the file if it does not exist, before continuing with the next step in the application. If the file does exist, the code immediately transfers to the next step in the application, -(RESUME label):

```plaintext
SET TRMOUT=OFF
STATE baseapp/myproc.fex
SET TRMOUT=ON
-IF &RETCODE EQ 0 THEN GOTO RESUME;
...
* Some code to create the file goes here
...
-RESUME
```

APP LIST

The APP LIST command alphabetically lists the applications available under the application root, APPROOT, or under an APP MAPped location. It does not care if the APP is on the current application map or not, as it is a raw list of available applications.

Syntax: How to List the Applications in APPROOT

```plaintext
APP LIST [HOLD]
```

If the HOLD option is used, the output is written to a temporary file called focappl.ftm, (FOCAPPL on PDS Deployment), which can, in turn, be used in a request to drive a report or take an action using the catalog/focappl Master File.

Limitations:

- APP LIST does not display nested application names.
- On operating systems that use case sensitive file names (such as UNIX), uppercase physical directory names are not valid (so are not returned by APP LIST). APP names are case insensitive, but they are created on disk as lowercase, which may in turn be upper-cased by the native operating system (that is, OpenVMS ODS/2 disks and PDS uppercase file names). However, APP LIST returns them in lowercase, to be homogenous across operating systems.
Example: Using APP LIST to List and Work with Applications

The following request lists applications

APP LIST

The APP LIST output is:

BEGIN-APP-LIST
15/02/2000 13.36.38  baseapp
15/02/2000 13.36.38  ggdemo
15/02/2000 13.36.38  ncp
15/02/2000 13.36.38  template
END-APP-LIST

The following request lists applications that have been stored using the HOLD option

APP LIST HOLD
SQL SELECT DATE, TIME, APPNAME FROM FOCAPPL;
END

The APP LIST output is:

<table>
<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>APPNAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>15/02/2000</td>
<td>13.36.38</td>
<td>baseapp</td>
</tr>
<tr>
<td>15/02/2000</td>
<td>13.36.38</td>
<td>ggdemo</td>
</tr>
<tr>
<td>15/02/2000</td>
<td>13.36.38</td>
<td>ncp</td>
</tr>
<tr>
<td>15/02/2000</td>
<td>13.36.38</td>
<td>template</td>
</tr>
</tbody>
</table>

The following practical example of using the APP LIST HOLD command issues a TABLE request against the HOLD file to check if any files exist in the application myapp. If no lines are returned, the application does not exist, so it is created, and the application continues. Otherwise, the application continues without creating the application.

APP LIST HOLD
TABLE FILE FOCAPPL
PRINT * ON TABLE HOLD WHERE APPNAME = 'myapp'
END
-IF &LINES GT 0 THEN GOTO RESUME
APP CREATE myapp
-RESUME

APP QUERY

The APP QUERY command lists files within a given application. Applications and specific nested applications can be queried.
Syntax: How to List Components

APP QUERY app1[/app1a]... [app2[/app2a]...] ... [appn[/appna]] [HOLD]

where:
app1[/app1a...appn[/appna]

Are application names. They can be nested application names. If you need to specify more application names than can fit on one line, add the continuation character (-) at the end of the first line, and continue more application names on the next line.

If the HOLD option is used, the output is written to a temporary file called focappq.ftm (FOCAPPQ on PDS Deployment), which can, in turn, be used in a request to drive a report or take an action using the catalog/focappq Master File.

Limitations: All files within an APP are listed. On systems like UNIX, this may include files of any case, so files such as MYPROC.FEX and myproc.fex may appear in a listing, but only the lowercase version would be accessed in a request.

Example: Listing Application Files

The following request lists application files.

APP QUERY abc

The APP QUERY output is:

BEGIN-APP-QUERY: abc
24/10/2014 21.38.28 4 F myproc1.fex
24/10/2014 21.38.35 4 F myproc1.fex
24/10/2014 21.37.49 4 F myapp1
24/10/2014 21.32.36 0 D myapp2
END-APP-QUERY

The following request lists files that have been stored using the HOLD option.

APP QUERY ABC HOLD
SQL SELECT DATE, TIME, GMTTIME, SIZE, OTYPE, FILENAME, APPNAME FROM FOCAPPQ ;
END

The APP QUERY output is:

<table>
<thead>
<tr>
<th>DATE</th>
<th>TIME</th>
<th>GMTTIME</th>
<th>SIZE</th>
<th>OTYPE</th>
<th>FILENAME</th>
<th>APPNAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>24/10/2014</td>
<td>21.38.28</td>
<td>1414201108</td>
<td>4</td>
<td>F</td>
<td>myproc1.fex</td>
<td>abc</td>
</tr>
<tr>
<td>24/10/2014</td>
<td>21.38.35</td>
<td>1414201115</td>
<td>4</td>
<td>F</td>
<td>myproc2.fex</td>
<td>abc</td>
</tr>
<tr>
<td>24/10/2014</td>
<td>21.37.49</td>
<td>1414201069</td>
<td>4</td>
<td>D</td>
<td>myapp1</td>
<td>abc</td>
</tr>
<tr>
<td>24/10/2014</td>
<td>21.32.36</td>
<td>1414200756</td>
<td>0</td>
<td>D</td>
<td>myapp2</td>
<td>abc</td>
</tr>
</tbody>
</table>
Note that APP QUERY ... HOLD returns a slightly extended type of information. Whitespace has selectively been removed from the above output for readability (the FILENAME column is actually 70 characters wide).

The following practical example of using the APP QUERY HOLD command checks the existence of the file `myproc1.fex` in application `abc`. If the file does not exist, the procedure exits. If the file does exist, the procedure continues.

```plaintext
APP QUERY abc HOLD
TABLE FILE FOCAPPQ
PRINT * ON TABLE HOLD
WHERE APPNAME = 'abc'
WHERE FILENAME = 'myproc1.fex'
END
-IF &LINES GT 0 THEN GOTO RESUME
-TYPE Procedure Not Found ... exiting!
-EXIT
-RESUME
```

**Retrieving Extended Catalog Information**

This section provides basic information about querying the server catalogs.

**catalog/sysapps**

The catalog/sysapps table contains metadata for physical objects on path.

This section only touches on basic uses typically needed by a developer. The Master File on disk robustly describes more attributes than are described here. You can directly study the Master File in order to understand other uses. The catalog/sys* group of files are subject to change (and are usually upwardly compatible). You should never write applications that have specific dependencies (typically on object size), which tend to cause upward compatibility issues.

**Example:** *Listing Files in an APP*

The following request lists the application name, application location, file names, and file extensions in the application named `abc`.

```plaintext
TABLE FILE SYSAPPS
PRINT APPNAME APPLOC FNAME FEXT
WHERE APPNAME EQ 'abc' ;
END
```
The following practical example of using the SYSAPPS table to check file existence checks the existence of the file `myproc1.fex` in the application `abc`. If it does not exist, the procedure exits. If the file does exist, the procedure transfers to the next step in order to continue:

```
TABLE FILE SYSAPPS
PRINT * ON TABLE HOLD
WHERE APPNAME = 'abc';
WHERE FNAME = 'myproc1';
WHERE FEXT = 'fex';
END
-IF &LINES GT 0 THEN GOTO RESUME
-TYPE Procedure Not Found ... exiting!
-EXIT
-RESUME
```

 catalog/sysfiles

The catalog/sysapps table contains metadata for app name objects on a path for a select object type. The default is for file type MASTER (Master Files), but is settable for other types. Unless limited in some way, all objects (of the selected type) are displayed.

This section only touches on basic uses typically needed by a developer. The Master File on disk robustly describes more attributes than are described here. You can directly study it in order to understand other uses. The catalog/sys* group of files are subject to change (and are usually upwardly compatible). You should never write applications that have specific dependencies (typically on object size), which tend to cause upward compatibility issues.

**Example:** Listing APP MASTER Objects

The following request lists file names, file names with their application paths, and extensions of files with file type MASTER (the default):

```
TABLE FILE SYSFILES
PRINT FILENAME LGNAME PHNAME EXTENSION
END
```
Example: Listing APP FOCEXEC Objects

The following request sets the file type to FOCEXEC and then prints the file names, file names with their application paths, and extensions of files with file type FOCEXEC:

```
SQL FMI SET SYSFILES FOCEXEC
TABLE FILE SYSFILES
PRINT FILENAME LGNAME PHNAME EXTENSION
END
```

The output (with some records and whitespace selectively removed for readability) is:

```
FILENAME     LGNAME    PHNAME                    EXTENSION
------------- -------     --------------------   --------
...          
myproc1      FOCEXEC   baseapp/myproc1                 fex
myproc2      FOCEXEC   baseapp/myproc2                 fex
...          
```

Note: The value for LGNAME will switch to DEFAULT if the data is limited and only one object returns.

A valid value for the SQL FMI SET SYSFILES command is any valid server file type. Some examples are FOCUS, FOCEXEC, STY, PDF, or ACCESS. For a full list of valid file types, see Designating File Types for APP Commands on page 218.
Example: Using the SYSFILES Table to Check File Existence

The following practical example of using the SYSFILES table to check file existence prints the filename `myproc1` with extension `fex` (with the file type set to FOCEXEC). If no lines are returned, the file does not exist and the procedure exits. If the file exists, the procedure transfers to the point at which processing continues.

```
SQL FMI SET SYSFILES FOCEXEC
TABLE FILE SYSFILES
PRINT FILENAME ON TABLE HOLD
WHERE FILENAME = 'myproc1' ;
WHERE EXTENSION = 'fex' ;
END
-IF &LINES GT 0 THEN GOTO RESUME
-TYPE Procedure Not Found ... exiting!
-EXIT
-RESUME
```

Help Information: APP HELP

The APP HELP command provides help information for all of the APP commands.

Syntax: How to Request Help for an APP Command

```
APP HELP command parameters
```

where:

`command`

Is any valid APP command.

`parameters`

Are parameters that are available to or required by the command.

Restricting the Use of APP Commands

Server administrators can restrict the ability of other classes of users to change the APP environment. This setting is configurable for Application Administrators and Basic Users.

When this restriction is set, all user interfaces affected by this server setting, such as the Web Console, the Data Management Console, and Managed Reporting, display only applications that are in the effective application search path, instead of displaying all applications defined by the server approot setting. In addition, the use of certain APP commands that users might otherwise issue to bypass the intended controls is restricted.

To ensure full administrative capabilities, the restriction is dynamically switched off when a user who has server administration rights logs on from client software or to the Web Console.
This capability is supported with all security settings.

**Procedure:** How to Restrict the Use of APP Commands

The server administrator can restrict the use of APP commands by other users.

1. From the *Workspace* menu, select *Access Control*.
2. Expand the *Roles* folder for *Application Administrator* or *Basic* user.
3. Right-click a *user* or *group* and choose *Properties*.
4. Select the *General Privileges* tab.
5. By default *Change Own Application Path (No applock)* is selected. Deselect this check box to restrict the current user or group ability to use the APP commands listed below.
6. Click *Apply* to confirm the setting.
Once modification of the application path is blocked, use of the following APP commands is restricted for the designated user or group:

- The following commands generate an error message:
  - APP CREATE
  - APP DELETE
  - APP RENAME

- Although no error message is explicitly generated, the following commands are restricted if they reference an application outside of the current application path:
  - APP APPENDPATH
  - APP HOLD
  - APP HOLDDATA
  - APP HOLDMETA
  - APP MAP
  - APP PATH
  - APP PREPENDPATH
  - APP COPY
  - APP COPYF[ILE]
  - APP DELETEF[ILE]
  - APP MOVEF[ILE]
  - APP RENAMEF[ILE]

**Accessing Metadata and Procedures**

Permanent files include metadata and procedures that were either created before the session by another application or remain after the session is over for use by another application.

**Search Rules**

Unless a file name is fully qualified with the application name, the search sequence is:

1. Current directory of the agent, which is edatemp/tsnnnnn.
2. Applications set using APP HOLDMETA for metadata files, and APP HOLDDATA for hold data files.

3. Applications set in APP PATH (including MVSAPP for z/OS).

4. The baseapp application.

5. The EDAHOME/catalog.

6. For stored procedures only: if the file is not found, the server checks to see if the file was allocated with a FILEDEF or DYNAM command, and if so, tries to execute it.

Example: Search Paths

The following commands follow the search path, starting with the application set by the APP HOLDMETA command:

```
APP HOLDMETA APP1
```

When a procedure is executed, and referred to by a one-part name

```
EX ABC
```

the following is executed

```
profile.fex in APP1 application
```

followed by

```
EX APP1/ABC
```

If the procedure ABC is not found in APP1, the server follows the standard search path for procedures to find and execute it.

Creation Rules for Procedure Files

Unless a file name is fully qualified or redirected to another location using an APP HOLD, APP HOLDMETA, APP HOLDDATA, FILEDEF, or DYNAM command, it is created in the temporary application area of the agent and disappears after the agent is released.

For example, on z/OS if DYNAM allocation for HOLDMAST or HOLDACC is present, the metadata files are created in the corresponding PDSs (for example, for a CREATE SYNONYM or TABLE FILE file with HOLD).

For related information, see Output Redirection Commands on page 222.

Locating Master Files and Procedures

Once your path is set, you can locate Master Files and procedures using the WHENCE command.
**Syntax:** How to Locate Master Files and Procedures

To locate a Master File or procedure, issue the following command

```
WHENCE filename filetype
```

where:

- **filename**
  - Is the name of the file you are trying to locate.

- **filetype**
  - Is the type of file you are trying to locate.

**Accessing Existing Data Files**

You can allocate existing data files using the following methods:

- DATASET keyword in the Master File.
- FILEDEF command for non-FOCUS data sources (FIXED, RMS, VSAM, XML).
- USE command for FOCUS data sources.
- For the z/OS Server, native operating system services, when supported.
- DYNAM command as a USS equivalent for the MVS ALLOCATE command.
- Superseded by JCL DD card.

It is recommended that you use only one method for each allocation.

**Creation Rules for Data Files**

For a newly created data file, the location is determined as follows:

1. An application set by APP HOLDDATA applies to all HOLD files.
2. For FILEDEF command, one for each data file.
3. For z/OS, native operating system allocations when supported.

The request that caused the file to be created determines the file DCB parameters, such as record length, record format, and so on.

For related information, see *Output Redirection Commands* on page 222.
**Example:** Sample Allocations by JCL

The following table contains sample allocations by JCL.

<table>
<thead>
<tr>
<th>VSAM</th>
<th>//VSAM01 DD DISP=SHR, DSN=qualif.DATA.VSAM</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>This type of allocation requires the szero = y parameter in the edaserve.cfg file to support sharing of BufferPool Zero.</td>
</tr>
<tr>
<td>Fixed</td>
<td>//FIX01 DD DISP=SHR, DSN=qualif.FIXED.DATA</td>
</tr>
<tr>
<td>PDS</td>
<td>//MASTER DD DISP=SHR, DSN=qualif.MASTER.DATA</td>
</tr>
<tr>
<td>FOCUS</td>
<td>//CAR DD DISP=SHR, DSN=qualif.CAR.FOCUS</td>
</tr>
</tbody>
</table>

**Example:** Sample DYNAM Commands

The following table contains samples of the DYNAM command.

<table>
<thead>
<tr>
<th>VSAM</th>
<th>DYNAM ALLOC FILE QVASM DA qualif.QVSAM.VSAM SHR REUSE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fixed</td>
<td>DYNAM ALLOC FILE FILE1 DA qualif.FILE1.DATA SHR REUSE</td>
</tr>
<tr>
<td>PDS</td>
<td>DYNAM ALLOC FILE MASTER DA qualif.MASTER.DATA SHR REUSE</td>
</tr>
<tr>
<td>FOCUS</td>
<td>DYNAM ALLOC FILE CAR DA qualif.CAR.FOCUS SHR REUSE</td>
</tr>
</tbody>
</table>

**Syntax:** How to Issue a FILEDEF Command

```plaintext
FILEDEF filedes DISK app/[appa...] physfile.ftm
```

where:

`filedes`

Is a file designation (ddname).

`app/[appa...]`

Is an application name. It can be a nested application name.
physfile.ftm

Is a physical file located in the application.

**Syntax:** How to Issue a FILEDEF Command to Concatenate Files

```
FILEDEF concatname DISK [app1/]filename1.ext
FILEDEF name2 DISK [app2/]filename2.ext  
...
FILEDEF namen DISK [appn/]filenamen.ext
FILEDEF concatname CONCAT name2 ... namen
```

where:

`concatname`

Is the ddname for one of the files and the name for the concatenated files. Use this name in a request. The individual ddnames will not be available once they are used in a FILEDEF CONCAT command.

`name2 ... namen`

Are ddnames for the files that will be added to the concatenation.

`app1 ... appn`

Are application names. They can be nested application names.

`filename1.ext ...filenamen.ext`

Are the physical file names.
**Example:** Concatenating Files Using FILEDEF

The following request creates three files, file1.ftm, file2.ftm, and file3.ftm.

```
APP HOLD appl
TABLE FILE WF_RETAIL_LITE
SUM COGS_US REVENUE_US
BY STATE_PROV_NAME
WHERE STATE_PROV_NAME LE 'F'
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE HOLD AS file1 FORMAT ALPHA
END
-RUN
TABLE FILE WF_RETAIL_LITE
SUM COGS_US REVENUE_US
BY STATE_PROV_NAME
WHERE STATE_PROV_NAME GT 'F' AND STATE_PROV_NAME LE 'M'
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE HOLD AS file2 FORMAT ALPHA
END
-RUN
TABLE FILE WF_RETAIL_LITE
SUM COGS_US REVENUE_US
BY STATE_PROV_NAME
WHERE STATE_PROV_NAME GT 'M'
WHERE COUNTRY_NAME EQ 'United States'
ON TABLE HOLD AS file3 FORMAT ALPHA
END
```

The following commands concatenate the three files.

```
FILEDEF FILE1 DISK appl/file1.ftm
FILEDEF FILE2 DISK appl/file2.ftm
FILEDEF FILE3 DISK appl/file3.ftm
FILEDEF FILE1 CONCAT FILE2 FILE3
```

The following procedure issues a request against the concatenated files.

```
TABLE FILE FILE1
SUM COGS_US REVENUE_US
BY STATE_PROV_NAME
ON TABLE SET PAGE NOPAGE
ON TABLE SET STYLE *
GRID=OFF, SIZE=8,$
END
```
Syntax: How to Issue a FILEDEF Command for a Native MVS Data Set

FI filedes DISK "//'NATIVE.MVS.DATASET'"

where:

filedes

Is a file designation.

NATIVE.MVS.DATASET

Is a Native MVS data set. It can contain any number of qualifiers, up to 44 characters long.

Syntax: How to Issue a USE command

The USE command can be issued instead of an allocation command for FOCUS data sources. The USE command is the only mechanism for accessing files on the sink machine.

Example: Sample USE Commands

The USE command supports renaming of Master Files and concatenation of data sets. The USE command is the only mechanism for accessing files on the sink machine.

Renaming a Master File

USE
    CAR1 AS CAR
END

Concatenating Master Files

USE
    CAR1 AS CAR
    CAR2 AS CAR
END

Accessing Files on a Sink Machine

USE
    CAR1 ON FOCSU01
END

Data Set Names

If a data set name satisfies one of the following conditions, the server assumes that it is an MVS file name:

- Data set name starts with "//".
Data set name contains no "/" and contains at least one "."

In all other cases, the name is interpreted as an HFS file name.

**Syntax:**

**How to Define a Data Set**

The following syntax is supported:

- `DATASET=APP1/physfile.ftm`
- `DATASET='qualif.car.data'`
- `DATASET=qualif.car.data`

In addition, on z/OS, you can use the following:

<table>
<thead>
<tr>
<th>GDG files</th>
<th><code>FILENAME=CARGDG,SUFFIX=FOCUS, DATASET='qualif.CARGDG.FOCUS(0)'</code></th>
</tr>
</thead>
<tbody>
<tr>
<td>PDS members</td>
<td><code>FILENAME=CARMEMB,SUFFIX=FOCUS, DATASET=qualif.CARPDS.DATA(CARMEMB)</code></td>
</tr>
<tr>
<td>FOCUS, VSAM, Fixed</td>
<td><code>FILENAME=CAR,SUFFIX=FOCUS, DATASET=//'qualif.CAR.FOCUS'</code></td>
</tr>
</tbody>
</table>

**Allocating Temporary Files**

Temporary files are transient files that disappear after you end a session. By default, all temporary data files (for HOLD and FOCSORT files) and temporary metadata files, such as temporary Master Files and Access Files, are created in the temporary area of an agent, which corresponds to your TSCOM ID. For example, if your TSCOM ID is TS000001, your temporary files are located in //edatemp/ts000001.

For z/OS, you can control the size and location of these temporary metadata files and data files. You can specify that the temporary files reside in the hierarchical file system, MVS data sets, or in hiperspace.

**Syntax:**

**How to Allocate Temporary Files**

To specify the allocation of your temporary files, issue the following command

```
DYNAM SET TEMP[ALLOC] {HFS|MVS|HIPER}
```

where:

- **HFS**
  
  Allocates temporary files to the hierarchical file system. HFS is the default value.
**MVS**

Allocates temporary files to MVS data sets.

**HIPER**

Allocates temporary files to hiperspace.

**Reference:** Usage Notes for Allocating Temporary Files

For z/OS, temporary metadata files can be allocated using a similar procedure to allocating permanent metadata files:

- If DYNAM allocation for HOLDMAST or HOLDACC is present, temporary files are stored in the designated PDSs.
- If DYNAM SET TEMP[ALLOC] MVS is issued; in the default temporary PDSs.
- If DYNAM SET TEMP[ALLOC] HIPER is issued; in the HIPERSPACE.

**Syntax:** How to Allocate Temporary Files to MVS Data Sets

To alter the default allocation parameters for temporary files for MVS data sets, issue the following command

```
DYNAM SET TEMP[ALLOC] FOR type dynam_parms
```

where:

**type**

Is one of the following: HOLDACC, HOLDMAST, HOLD SAVE, REBUILD, FOCUS, FOCSORT, OFFLINE, or FOC$HOLD.

**dynam_parms**

Are regular DYNAM ALLOC parameters to be used as default for that type. Note that DCB parameters, if provided here, will be ignored, since they must be compatible with the file type being written.

This is similar to the functionality of IBITABLA in the SSCTL Server. The defaults should be overwritten for all cases when, in older versions, a private copy of IBITABLA existed containing different values.

**Reference:** System Defaults for Allocating Temporary Files to MVS Data Sets

System defaults for HOLDMAST and HOLDACC are:

```
TRKS 5 5 DSORG PO DIR 36 NEW REU
```
System defaults for all other types are:

CYLS  5  10  DSORG  PS  NEW  REU

**Syntax:**

**How to Support Long Synonym Names Using DYNAM SET LONGSYNM**

The server supports synonym names up to 64 characters. However, PDS member names cannot exceed eight characters. The server accounts for this operating environment limitation with the command DYNAM SET LONGSYNM.

A synonym comprises a Master File and, usually, an Access File. When you create a synonym with a name exceeding eight characters, the LONGSYNM setting currently in effect determines how the long name of the Master File and of the Access File will be handled.

You can issue DYNAM SET LONGSYNM anywhere SET commands are valid, including the global server profile (edasprof.prf) and a stored procedure (FOCEXEC).

DYNAM SET LONGSYNM, on servers running on z/OS, corresponds functionally to the server configuration file keyword LONGSYNM on servers running on MVS.

The syntax is

```
DYNAM SET LONGSYNM {HFS|MVS|MATCH}
```

where:

**HFS**

Specifies that each synonym whose name is longer than eight characters will be created in an HFS directory. This is the default.

**MVS**

Specifies that when you save a synonym with a name exceeding eight characters, the server truncates the name, preserving up to the first six characters, followed by a left curly brace ({{) and a suffix number that ensures the name is unique. (The server preserves the original long name within the synonym files.)

For example, if you create a Master File named VERYLONGNAMETEST, it will be saved as VERYLO{0. If you then create a Master File named VERYLONGNAMEPROD, it will be saved as VERYLO{1.
The server chooses a suffix number by taking the next unused number in the sequence for that truncation of a Master File or Access File name. If the next number available for the Master File is different than that available for the Access File, the files will be created with different numbers. For example, if the highest Master File name truncated to VERYLO is VERYLO{8, and the highest Access File name truncated to VERYLO is VERYLO{5, and you create a synonym specifying the name VERYLONGNAMEAGAIN, the new Master File will be saved as VERYLO{9, and the new Access File will be saved as VERYLO{6.

**MATCH**

Works the same as the MVS setting, except that it ensures that the truncated names of a Master File and Access File synonym will always match. That is, they will be named using the same suffix number.

In the example provided for the MVS setting, if SET LONGSYNM had instead been set to MATCH, both the new Master File and the new Access File would have been named VERYLO{9.

Matching names may be a convenience for some people if they manually manage synonym files. It is less efficient than the MVS setting, however.

**Temporary Space Usage and Location**

The server uses temp space for the various processes. This space may be used for anything from logs and traces to transient work files (such as HOLD files). This temp space uses real disk space, but is recycled and cleaned up based on server configuration (for example, secured servers clean agent directories upon disconnect). Ultimately, a server restarts also cleans up this temporary space. If a server has been turned off, and a restart is not planned (possibly because it was a test configuration), the space may be recovered by the server admin with the following command:

```
edastart -cleardir
```

**Temporary Disk Space Usage for Non-PDS Deployment**

Temporary space, by default, is created under the configuration directory (ffs, wfs, or dm) in the file system used to install the product. The edatemp directory is two levels deep.

The first level directory is used for trace files if tracing is active. By default, the directory is named edatemp and is also generally referred to as the edatemp directory of EDACONF.
The subdirectory is used for temporary files and traces created by various processes, such as the TCP and HTTP listeners, the Workspace Manager, and the end-user agent processes. Each connecting user is assigned to a private data agent directory to isolate their work from other users, and that directory is cleaned up upon disconnect. The agent subdirectories are named tsnnnnnn, where nnnnnn is the ID number assigned to the data agent.

The edatemp directory can be configured to use a separate file system by setting the EDATEMP variable to point at the alternate location. The steps and syntax vary by platform, and may be done as an operating system variable or as a variable in the server configuration file (edaserve.cfg) before server start up.

If you are using the server configuration file, the best method is to edit edaserve.cfg from the Web Console Workspace folder, adding the line:

```
edatemp = directory
```

where

```
directory
```

Is a full path directory name, using the appropriate platform syntax. After saving, restart the server.

**Note:** Editing the server configuration file (edaserve.cfg) is the only method available for Windows.

**Syntax:** How to Specify the EDATEMP Variable

**For UNIX and Linux,** the edatemp variable can be coded in the edastart.sh file:

```
export EDATEMP=/u/iway/edatemp
```

**Note:** This also applies to IBM i, VMS, and Windows.

For OpenVMS, the edatemp variable can be coded in the edastart.com file:

```
DEFINE EDATEMP TMP:[TMP.EDATEMP]
```

For UNIX System Services, it can be coded in the ISTART JCL member under the EDAENV dd statement:

```
//EDAENV DD *
EDATEMP=/u/iway/edatemp
```

For z/OS UNIX System Services only, you can set the temporary area to MVS by using the following command in edasprof.prf or user profile.

```
DYNAM SET TEMPALLOC MVS
```
The above are global settings which affect temporary file allocations for all users.
It can be specified in the edaserve.cfg file.

```
edatemp=/u1/home/temp
```

Syntax: **How to Pre-Allocate Temporary Files**

You can pre-allocate an individual file for a user, using the following techniques:

- **For UNIX and Linux:**
  ```
  FILEDEF XXX DISK /u/another/area/xxx.dat
  
  where:
  
  /u/another/area
  
  Has enough free space to hold the file.
  ```

- **For Windows:**
  ```
  FILEDEF XXX DISK C:\tmp\another\area\xxx.dat
  
  where:
  
  tmp\another\area
  
  Has enough free space to hold the file.
  ```

- **For OpenVMS:**
  ```
  FILEDEF XXX DISK TMP:[ANOTHER.AREA]XXX.DAT
  
  where:
  
  TMP:[ANOTHER.AREA]
  
  Has enough free space to hold the file.
  ```

- **For z/OS UNIX System Services:**

  You can use the same filedef syntax indicated for UNIX, or you can use the DYNAM command to direct the temporary file to MVS.

  ```
  DYNAM ALLOC FILE XXX SPACE
  ```

  Note that, for the DYNAM command, you must to specify the amount of space required.

- **For FOCUS files:**
You can use the **FILEDEF** and **USE** commands to create a FOCUS file outside the edatemp area.

```
FILEDEF NAME DISK /{pathname}{filename}.foc ......
USE NAME NEW
END
```

**Syntax:**

**How to Dynamically Allocate FOCUS Files on z/OS**

You can dynamically allocate FOCUS files on z/OS with the **USE** command. The command is

```
DYNAM ALLOC FILE ddname SPACE
USE ddname AS masterfile
END
```

where:

- **ddname**
  - Is the DDNAME.

- **masterfile**
  - Is the Master File name.

If the DDNAME and Master File name are the same, use just the command:

```
DYNAM ALLOC
```

**Application Tools**

An application program may be as simple as a TABLE FILE ... END request or as elaborate as a series of replaceable variables (known as amper variables) controlled by dynamic inputs, GOTO statements, and/or looping logic (known collectively as Dialogue Manager). While Dialogue Manager is fully detailed in the Stored Procedure Reference manual, a limited set of these commands and tools are also noted here due to their integral use in APP management.

**EX Procedure and Amper Variables**

The **EX** procedure executes another procedure, as found on the application path. The procedure extension (on non-PDS platforms) is not required, and is assumed to be .fex. The full syntax is:

```
EX[EX] [appname/]procedure[.fex] [parameter=value[,parameter=value][,...]
```

Parameters may be names (such as LASTNAME) or numeric (such as 1), and may be mixed within the list. A specific APP name can be referenced and does not require the APP to be on the application path prior to execution. Numerics can also be assumed positionally, as in this example:
EX mytest DETAIL=ALL,QUARTERLY,PERSON=JAMES MADISON,5=MANAGER

and the procedure would contain amper variables (parameters) for &DETAIL, &2, and &PERSON, and would use the context of:

TABLE FILE...
WHERE PERSON IS '&PERSON' AND PERIOD EQ '&2'
...
END

There are two types of amper variables, single and double. Single amper variables are only active within the procedure they are created in. Double amper variables are good for the life of the session. Additionally, there are predefined, single amper variables, such as &LINES (records returned from a request), &FOCUSER (current user ID), &FOCCFOCEXEC (name of the current executing procedure), &FOCCODEPAGE (the server NLS code page), and many others. See the Stored Procedure Reference manual for a detailed listing of other pre-defined amper variables.

EX EDAMAIL

EDAMAIL is an internal procedure that allows you to send emails from a procedure with the content of a specific file included in the email body or as an attachment. This is useful for sending email alerts for events ranging from special error conditions to simple report completion. EDAMAIL requires a configured (and working) email SMTP Server node for the server workspace.

There are two forms of syntax for EDAMAIL:

- The original form uses positional parameters, and is limited to the original specification.
- The extended form uses non-positional, name-value pair parameters. The extended form supports additional SMTP email client features such as Reply To and Importance.

The extended form is assumed if the first parameter contains an equal sign (=) indicating a name-value pair is being passed.

The basic form of email address (that is, foo@foo.com or <foo@foo.com>) may be used in either the original or the extended form of EDAMAIL. Extended forms of email addressing (such as My Support <support@foo.com>, "My Support" <support@foo.com>, "My Support <support@foo.com>", and "Support, Me <support@foo.com>") are only supported in the extended form of EDAMAIL.

Multiple addresses may be use for parameters that support multiple addresses (for example, to) when properly formed and delimited.
For multiple addresses and basic EDAMAIL, the separator must be a semi-colon (;), and the overall string may be, optionally, enclosed in double quotation marks, but remember that basic EDAMAIL only supports simple addresses.

For multiple addresses and extended EDAMAIL, the separator is normally a semi-colon (with exceptions where a comma may used), plus the overall string must be enclosed in single quotation marks if any of the addresses contains a comma (for example, Support, Me <support@foo.com>). A comma may be used as separator if the email addresses are all simple addresses (that is, foo@foo.com or <foo@foo.com>), plus the overall string must be enclosed in single or double quotation marks.

The actual use and display of the email headers created by EDAMAIL are a function of the SMTP Server in use (and any intervening SMTP hops), plus the user email client (such as Outlook, Gmail, Hotmail, and so on). They are not directly controlled by the sender email headers. Therefore, an email may not always exhibit the expected behavior in all email client environments. For example, older email clients may not recognize newer header types, and may ignore Reply To. Any functional issues should first be investigated by an experienced SMTP/Email administrator to determine if they are client-related.

**Syntax:**

**How to Use EX EDAMAIL in the Positional Parameter Form**

The syntax is:

```plaintext
EX EDAMAIL to, cc, bcc, from, subject, [flag], filetype, data
```

where:

- **to**

  Is the email recipient. Multiple addresses are allowed, using a semi-colon as the address separator.

- **cc**

  Is the carbon copy recipient. Multiple addresses are allowed, using a semi-colon as the address separator.

- **bcc**

  Is the blind carbon copy recipient. Multiple addresses are allowed, using a semi-colon as the address separator.

- **from**

  Is the email sender.
subject

Is the email subject string. If the subject string contains a comma, the string must be enclosed in single or double quotation marks.

flag

If set to a or A, the file is sent as an attachment. Otherwise, it is included as the body of the email. All other values are ignored. The value is also ignored if the filetype parameter is blank.

filetype

Defines the data file type for an email message body that uses a file. Any application file type is valid, including MASTER, FOCEXEC, HTML, TEXT, and so on. Leave the parameter empty to use the inline email message body feature.

data

Is the inline data stream for the email message body or the [app/]filename file containing the email message body. The inline data stream feature requires an empty filetype parameter. The EDAMAIL feature can also spread an inline email message body on to multiple lines using the -LINES \{n|*\} feature.

If an inline data stream message body is spread across multiple lines in the procedure, the resulting email is a single line of output. Multi-line message bodies are respected when the message body from a file option is used.

Example: Mailing an HTML File as Message Body

```plaintext
TABLE FILE file1
PRINT A B C
ON TABLE HOLD AS MYFILE FORMAT HTML
END
EX EDAMAIL  user1@corp1.com, user2@corp1.com, File1 Report,,HTML, MYFILE
```

Example: Mailing an HTML File as a Message Attachment

```plaintext
TABLE FILE file1
PRINT A B C
ON TABLE HOLD AS MYFILE FORMAT HTML
END
EX EDAMAIL  user1@corp1.com, user2@corp1.com, File1 Report,a,HTML, MYFILE
```
Example: Mailing a Multi-line Inline Message

```
EX -LINES * EDAMAIL user1@corp1.com, user2@corp1.com, &SUBJECT,,,
    Run result for &TESTNAME is:
 &RESULT
 EDAMAIL*
```

Syntax: How to Use EX EDAMAIL in the Extended Form

The EDAMAIL extended form using name-value pairs is activated by the detection of an equal sign (=) in the first parameter. Parameter names are not case sensitive and may be in any order, but the message parameter (if used) must be last.

The syntax is:

```
EX EDAMAIL to=addresslist,
    [toaddr= {addresslist|[%app/]addresslist.fex}, ]
    [cc=cadrlist1,]
    [ccaddr=cadrlist2,]
    [bccaddr=bcadrlst,] [from=address,]
    [fromaddr=address,] [replyto=address,] [importance=low|normal|high,]
    [subject=string,] [flags=value,] [filetype=extension,]
    [filename=file,] [message=body message]
```

where:

```
to=addresslist
```

Is the email recipient displayed by the user email client (and used in an email client Reply To All, if a toaddr header is not supplied). Multiple addresses are allowed, using a semi-colon as the address separator. A comma is also allowed as a separator, if the overall address string is enclosed in single quotation marks.

If the to parameter is used in conjunction with toaddr, the value of to may be an arbitrary string, such as Group Managers, which most email clients will display as a pseudo title in the To field, and will not display the actual addresses used in the toaddr parameter. A forced blank can be supped for the To field by using to="".

```
toaddr=addresslist
```

Is the email recipient. If not supplied, SMTP servers will use the to header. Email clients will use the toaddr value in an email client Reply To All. Multiple addresses are allowed, using a semi-colon as the address separator. A comma is also allowed as a separator, if the overall address string is enclosed in single quotation marks.
toaddr=%[app/]addresslist.fex

Is a FOCEXEC that generates an email recipient list at run time. Email clients will use the toaddr value in an email client Reply To All. The actual FOCEXEC may go against any data source for the addresses, but must PRINT a single column and use ON TABLE PCHOLD FORMAT COMT FORMATTED syntax to format the data (as one email address enclosed in double quotation marks per row).

The actual FOCEXEC extension must be .fex in the specification. This feature also only works in a running server context. It is not supported in any other mode.

cc=cadrlist1

Is the carbon copy recipient displayed by the user email client (and used in an email client Reply To All, if a ccaddr header is not supplied). Multiple addresses are allowed, using a semi-colon as the address separator. A comma (,) is also allowed as a separator, if the overall address string is enclosed in single quotation marks (').

If the cc parameter is used in conjunction with ccaddr, the value of cc may be an arbitrary string, such as Group Managers, which most email clients will display as a pseudo title in the Cc field, without displaying the actual addresses used in the ccaddr parameter. A forced blank can be supped for the Cc field by using to="".

ccaddr=cadrlist2

Is the carbon copy recipient. If not supplied, SMTP servers will use the cc header. Email clients will use the ccaddr value in an email client Reply To All. Multiple addresses are allowed, using a semi-colon as the address separator. A comma (,) is also allowed as a separator, if the overall address string is enclosed in single quotation marks (').

bccaddr=bcadrlist

Is the blind carbon copy recipient. Email clients will use the bccaddr value in an email client Reply To All. Multiple addresses are allowed, using a semi-colon as the address separator. A comma (,) is also allowed as a separator, if the overall address string is enclosed in single quotation marks (').

from=address

Is the email sender displayed by the email client (and used in an email client Reply, unless overridden by a fromaddr or Reply To header). If the from parameter is used in conjunction with fromaddr, the from value may be an arbitrary string, such as The Boss, which most email clients will display as a pseudo title in the From field, and will not display the actual address used in the fromaddr parameter.
fromaddr=address
Is the email sender. If not supplied, most email clients will use the From header when
doing a reply.

replyto=address
Is the email sender. If not supplied, most email clients will use the fromaddr or from
parameter value.

importance=low|normal|high
Is the email importance level for email clients that support importance flags. Valid values
are high, normal, and low.

subject=string
Is the email subject string. If the subject string contains a comma, the string must be
enclosed in single or double quotation marks.

flags=value
If set to a or A, the file is sent as an attachment. Otherwise, it is included as the body of
the email.

filetype=extension
Defines the data file type for an email message body that uses a file as the body. Any
application file type is valid, including MASTER, FOCEXEC, HTML, TEXT, and so on. Leave
the parameter out to use the inline email message body feature.

filename=file
Defines the data file for an email message body that uses a file as the body. Leave the
parameter out to use the inline email message body feature.

message=body message
Is the inline data stream containing the email message body. If used, it must be the last
parameter in the EDAMAIL command. To use the inline data stream feature, the filetype
and filename parameters cannot be supplied. The data stream may also be spread onto
multiple lines if EDAMAIL is used with the EX -LINES {n|*} feature.

If an inline data stream message body is spread across multiple lines in the procedure,
the resulting email is a single line of output. Multi-line message bodies are respected
when the message body from a file option is used.
**Example:**  Mailing an HTML File as a Message Body Using Multiple Addresses and Extended Form

```
TABLE FILE file1
PRINT A B C
ON TABLE HOLD AS MYFILE FORMAT HTML
END
EX EDAMAIL to=Managers,toaddr=user1@corp1.com;user2@corp1.com,
from=support1@corp1.com,subject=File1 Report, filetype=HTML,
filename=MYFILE
```
Adapters must be configured to allow a Full Function Server, a WebFOCUS Reporting Server, or a DataMigrator Server to access data in different types of databases. You must add and configure an adapter for every database type you want to access.

This topic describes briefly how to declare connection attributes and authentication information, when required, using the Web Console or the Data Management Console.

In this chapter:

- Changing Common Adapter Settings
- Configuring an Adapter
- Changing the Adapter Configuration
- Configuring a Remote Server
- Complete Adapter List
- SQL Automatic Passthru Status
- Determining SQL Optimization
- Data Type Support Report
- Displaying License Counts
- Social Media Adapters

### Changing Common Adapter Settings

The Web Console Connect to Data page has a button on the ribbon labeled *Change Common Adapter Settings* that allows you to customize data type mappings and other miscellaneous settings that are common to all adapters.

Adapter-specific settings are customizable as well, and can be accessed by right-clicking a configured adapter and selecting *Change Settings* from the context menu.
Configuring an Adapter

You can configure any supported adapter for use with a Full-Function Server, WebFOCUS Reporting Server, or DataMigrator Server from the Web Console or the Data Management Console.

If an adapter has already been configured, it is listed on the Configured Adapters list of the Connect to Data resources tree. Adapters that have not been configured are listed on the Available list.

For general instructions about adding an adapter and declaring connection attributes, see Declare Connection Attributes.

Note: Although all database configuration panes have the same look and feel, the parameters are specific to each database. To obtain detailed configuration information for an adapter, click the ? next to each parameter.

Most of the adapter configuration information is contained in two configuration files, EDASPROF.PRF and EDASERVE.CFG.

- EDASPROF.PRF, or the global profile, contains data adapter connection information.
- EDASERVE.CFG contains database release and access method information.

Your entries on the Web Console or the Data Management Console populate these files.

Changing the Adapter Configuration

The Configured Adapters list on the Connect to Data page lists the adapters that have already been configured for the current operational instance.

The following general information applies.

- Right-click an Adapter and choose from the tasks that are available for that adapter. The following table lists and describes the available tasks, or functions.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add connection</td>
<td>Adds a connection for adapters that have the functionality to support multiple connections. These can be created in any level profile.</td>
</tr>
<tr>
<td>Change Settings</td>
<td>Displays the Change Setting page, where you can change a variety of settings in effect for the selected adapter.</td>
</tr>
</tbody>
</table>
Right-click a connection to choose from the tasks that are available for the selected adapter. The following table lists and describes the available tasks or functions.

<table>
<thead>
<tr>
<th>Function</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>Removes the adapter configurations and all connection settings from the list of configured adapters.</td>
</tr>
<tr>
<td>Help</td>
<td>Provides specific information for the adapter.</td>
</tr>
<tr>
<td>Properties</td>
<td>Enables you to view and change connection parameters.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Duplicate entries are not verified.</td>
</tr>
<tr>
<td>Show DBMS objects or Show files</td>
<td>Opens the synonym creation pane, where you can enter the information required to create a synonym. These panes vary for different adapters. For information, click the ? next to each parameter.</td>
</tr>
<tr>
<td>Test</td>
<td>Runs a select statement for name/owner against a catalog table with a limit of up to 15 records. See Test an Adapter Connection.</td>
</tr>
<tr>
<td>Duplicate Connection</td>
<td>Opens a Duplicate Connection panel with the same connection name, suffixed with _dup, and the same server as the original connection. You can use this to connect to a different database than the one in the original connection, or use a different type of security model.</td>
</tr>
<tr>
<td>Configure Bulk Load</td>
<td>For some adapters, such as the Adapter for Redshift ODBC, opens a bulk load configuration page.</td>
</tr>
<tr>
<td>Test Bulk</td>
<td>Tests whether extended bulk load is available and displays a message.</td>
</tr>
<tr>
<td>Test DBMS Case Sensitivity</td>
<td>Displays a panel with information about case sensitivity for this DBMS.</td>
</tr>
<tr>
<td>Impact Analysis</td>
<td>Produces a report of the synonyms that use the connection.</td>
</tr>
</tbody>
</table>
Configuring a Remote Server

Configuring remote servers allow you to add nodes to the communications configuration. The connection attributes for a remote server are written to the server, user, group, or role profile, which can be chosen during configuration.

Remote servers can be configured from the Available list of the Connect to Data page. Right-click Remote Servers and select Configure. The Remote Server Configuration page opens. For configuration information, click the ? next to each parameter.

This adapter allows applications to access data sources that reside on a remote server.

Complete Adapter List

You can generate a list of every adapter with accompanying information about its major features using the Web Console.

**Procedure:** How to Display the Complete Adapter List Report

1. Click Connect to Data on the sidebar.
2. From the Help button of the ribbon, click Complete Adapter List.

The Complete Adapter List Report is displayed, as shown in the following image.

<table>
<thead>
<tr>
<th>Category</th>
<th>Sub-category</th>
<th>Adapter</th>
<th>Bulk Load</th>
<th>SQL Merge</th>
<th>SQL SP</th>
<th>CDC API</th>
<th>Unicode</th>
<th>Vendor Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQL 1</td>
<td>EDI</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 1</td>
<td>MS Azure SQL Data Warehouse</td>
<td>Extended: EDI</td>
<td>Append Only</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 1</td>
<td>MS SQL Server ODBC</td>
<td>Extended: BO</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 1</td>
<td>MySQL</td>
<td>Extended: LOAD DATA</td>
<td>Append Only</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Oracle</td>
<td>Extended: TPC</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Teradata</td>
<td>Extended: POWER LEADER</td>
<td>Yes</td>
<td>Opt</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Amazon Redshift ODBC</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Apache Hive</td>
<td>Extended: HADOOP FS</td>
<td>Append Only</td>
<td>Opt</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Apache Hive</td>
<td>Extended: LOAD DATA</td>
<td>Append Only</td>
<td>Opt</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Apache Phoenix</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Apache Spak SQL</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Cloudera Impala</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
<tr>
<td>SQL 2</td>
<td>Cloudera Impala</td>
<td>Standard</td>
<td>Full Functionality</td>
<td>Yes</td>
<td>Opt</td>
<td></td>
<td>Opt</td>
<td></td>
</tr>
</tbody>
</table>

The report lists the category, subcategory, and name of each adapter. It also lists its bulk load type, whether it supports SQL Merge, SQL SP, and the change data capture API. There is also a column for vendor notes.
SQL Automatic Passthru Status

You can find the Automatic Passthru (APT) status for a function or keyword from a report available from the Web Console.

**Procedure:** How to Display the SQL APT Status Report

1. Click Connect to Data from the sidebar.
2. From the Help button on the ribbon, click SQL APT Status.

The SQL APT Status Report is displayed, as shown in the following image.

The report lists the APT status for each function and keyword by each SQL adapter. The possibilities are:

- **Pass as is.** Do not convert, pass to the DBMS as is.
- **Convert.** Convert into a DBMS-specific implementation and pass to the DBMS.
- **FOCUS.** Force the SQL to be processed by FOCUS.

**Determining SQL Optimization**

You can determine which functions are optimized to their SQL counterparts by adapter in the SQL Optimization Report available from the Web Console.
**Procedure:** How to Display the SQL Optimization Report

1. Click *Connect to Data* on the sidebar.

2. From the Help button on the ribbon, click *SQL Optimization Report* button.

   The Filter SQL Optimization Report page opens, as shown in the following image.

3. Optionally, select an *Adapter Subcategory* from the corresponding list box.

4. Optionally, select a *Function Category* from the corresponding list box.

5. Optionally, select the *Show Function Description*, *Show DBCS Configuration*, *Show key parameter value(s)* or *Show Report in PDF* check boxes.

6. Click *Show Report*. 
The SQL Optimization Report is displayed, as shown in the following image.

Data Type Support Report

SQL Data Type mapping options are available in a report available from the Web Console.

Procedure: How to Access the Data Type Report

To access the Data Type Report:

1. Click Connect to Data on the sidebar.
2. From the Help button on the Ribbon, click Data Types.

The Filter Data Types Report page opens, as shown in the following image.

3. Select an Adapter Subcategory from the corresponding list box.
4. Select an Adapter from the corresponding list box.
5. Select a **Server Data Type** from the corresponding list box.

6. Click **Show Report**.

The Data Types Report is displayed, as shown in the following image.

---

**Data Types**

<table>
<thead>
<tr>
<th>Data Type Category</th>
<th>Vendor Data Types</th>
<th>Type Range</th>
<th>Server USAGE</th>
<th>Server ACTUAL</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date-Time</td>
<td>DATE</td>
<td>YYMD</td>
<td>DATE</td>
<td></td>
<td></td>
</tr>
<tr>
<td>TIM</td>
<td>H45M</td>
<td>H45M</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>TIMESTAMP</td>
<td>HYYSDD</td>
<td>HYYSDD</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LOG and Other</td>
<td>CLOB</td>
<td>TX9</td>
<td>TX</td>
<td></td>
<td></td>
</tr>
<tr>
<td>BLOB</td>
<td>BLOB</td>
<td>BLOB</td>
<td>BLOB</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DATALINK</td>
<td>N/A</td>
<td>N/A</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>XML</td>
<td>TX9</td>
<td>TX</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Numeric</td>
<td>SMALLINT</td>
<td>IS</td>
<td>IS</td>
<td>IS</td>
<td></td>
</tr>
<tr>
<td></td>
<td>INTEGER</td>
<td>HH</td>
<td>HH</td>
<td>HH</td>
<td></td>
</tr>
<tr>
<td></td>
<td>BIGNINT</td>
<td>P20</td>
<td>P20</td>
<td>P20</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DECIMAL(p,s)(NUMERIC(p,s))</td>
<td>Pk</td>
<td>Pk</td>
<td>pk+1</td>
<td>pk</td>
</tr>
<tr>
<td></td>
<td>DECIMAL(p,s)(NUMERIC(p,s))</td>
<td>Pkm</td>
<td>Pkm</td>
<td>km+2</td>
<td>km</td>
</tr>
<tr>
<td></td>
<td>REAL</td>
<td>P9</td>
<td>F4</td>
<td>F4</td>
<td></td>
</tr>
<tr>
<td></td>
<td>DOUBLE</td>
<td>D02</td>
<td>D0</td>
<td>D0</td>
<td></td>
</tr>
<tr>
<td>Character</td>
<td>CHAR(1)</td>
<td>An</td>
<td>An</td>
<td>An</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** You can also display the report as a PDF by selecting the **Show Report in PDF** check box.

---

**Displaying License Counts**

You can display license counts from the Web Console.

Click **Connect to Data** on the sidebar.

From the Help button on the ribbon, click **Adapters License Count**.

A report displays showing your license count, the number of adapters you are licensed for, the number of licensed adapters that are configured, and the number of free adapters that are configured.

**Social Media Adapters**

For information about the Social Media Adapters, see the *WebFOCUS Social Media Integration Guide*. 
The data source being used determines the type of metadata that is required. For example,

- When the server accesses a relational data source, it needs to know how to interpret the data stored there. You must create a synonym that describes the structure of the data source and the server mapping of the data types.

- When the server invokes a transaction or procedure, it needs to know how to build the request, what parameters to pass, and how to format an answer set from the response. You must create a synonym that describes the layout of the request/response area.

Whatever your data source, the adapter you are using manages the synonym creation process for you, creating a synonym that meets your specific requirements.

This topic describes briefly how to create, test, and otherwise manage a synonym, using the Web Console or the Data Management Console.

In this chapter:

- Creating Synonyms
- Testing Synonyms
- Managing Synonyms
- LNGPREP Utility: Preparing Metadata Language Files
- Introduction to Wizards
- Using the Upload Wizard
- Using Data Assist

Creating Synonyms

Synonyms define unique names (or aliases) for each table, view, transaction or procedure that is accessible from the server. Synonyms are useful because they hide the underlying data source location, identity, transaction or procedure from client applications. They also provide support for extended metadata features of the server, such as virtual fields and additional security mechanisms.
Creating Synonyms

You can create synonyms for supported adapters from the Web Console or the Data Management Console.

**Note:** Although all synonym creation panes have the same look and feel, the parameters are specific to each adapter. To obtain detailed information for an adapter, click a ? next to a parameter.

**Procedure:** **How to Create a Synonym**

To create a synonym, you must have previously configured the adapter. You can create a synonym from the Applications or Adapters pages of the Web Console.

1. From the Web Console menu bar, click **Applications**.
   The Applications page opens.
2. Click the **New** button and select **Synonym** from the drop-down menu.
   The **Select adapter to configure** or **Select connection to create synonym** pane opens.
3. Click a connection for the configured adapter.
   The first of a series of synonym creation panes opens.
4. Enter values for the parameters required by the adapter as described in the synonym creation parameters reference.
5. After entering the parameter values, click **Create Synonym**.
   The Status pane indicates that the synonym was created successfully.

**Note:**

- You can also create a synonym from the Adapters page by right-clicking a configured adapter connection and selecting **Create Synonym**. For some adapters, the option is **Create or Update Synonym**.

- Right-clicking an application also provides an **New/Synonym via Synonym Editor** option, which enable you to create a synonym using that tool. For more information, see the *iWay DataMigrator User's Guide*.

**Reference:** **Checking Synonyms**

Once you have created a synonym, you can view its properties by right-clicking the synonym and selecting **Properties** from the context menu.

The Properties page opens and shows the location, adapter, date last modified, and privileges of the connected user for this synonym.
Clicking the Check File button displays the number of errors, number of segments, number of fields, and length of all fields for the synonym.

**Testing Synonyms**

After you have created a synonym, it is good practice to ensure that it can retrieve data from a data source. You can quickly test this functionality on a sample of up to 50 rows.

**Procedure: How to Test a Synonym**

You can test a synonym from either the Web Console or the Data Management Console.

1. From the Web Console menu bar, click Applications

   or

   from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a synonym and select Sample Data.
The sample data is displayed.
Managing Synonyms

Once you have created a synonym, you can click the synonym name in the navigation pane of either the Web Console or the Data Management Console to access the following options:

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Open</td>
<td>Opens the Master File for viewing and editing using a graphical interface. If an Access file is used it will be also available.</td>
</tr>
<tr>
<td>Edit as Text</td>
<td>Enables you to view and manually edit the Master File synonym.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> To update the synonym, it is strongly recommended that you use the graphical interface provided by the Open option, rather than manually editing the Master File.</td>
</tr>
<tr>
<td>Edit Access File as Text</td>
<td>Enables you to view and manually edit the Access File synonym.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> This option is available only when an Access File is created as part of the synonym.</td>
</tr>
<tr>
<td>Sample Data</td>
<td>Retrieves up to 20 rows from the associated data source.</td>
</tr>
</tbody>
</table>

*Sample Data for ibssmp.short. Limited to 50 rows.*

<table>
<thead>
<tr>
<th>Date</th>
<th>Statement</th>
<th>Continent</th>
<th>Region</th>
<th>Country</th>
<th>Instrument/Link</th>
<th>Type of Instrument</th>
<th>Projected/Annualized, Return</th>
<th>Exchange Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2005-12-06</td>
<td>AMERICAS</td>
<td>NORTH AMERICA</td>
<td>UNITED STATES</td>
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<td>Option</td>
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</tr>
<tr>
<td><strong>Data Profiling</strong></td>
<td>Data Profiling provides the data characteristics for synonym columns. Reports are available for Statistics, Count, and Key Analysis.</td>
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</tr>
<tr>
<td></td>
<td>Alphanumeric columns provide the count of distinct values, total count, maximum, minimum, average length, and number of nulls.</td>
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<tr>
<td></td>
<td>Numeric columns provide the count of distinct values, total count, maximum, minimum, average value, and number of nulls.</td>
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</tr>
<tr>
<td><strong>Refresh Synonym (if applicable)</strong></td>
<td>Regenerates the synonym. Use this option if the underlying object has been altered.</td>
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<tr>
<td><strong>Metadata Management</strong></td>
<td>Options are:</td>
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<tr>
<td></td>
<td>Create Cluster. Lets you create a cluster synonym.</td>
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<tr>
<td></td>
<td>Prepare Translation Files. Prepares metadata translation files, as described in <em>LNGPREP Utility: Preparing Metadata Language Files</em> on page 271.</td>
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<tr>
<td><strong>Data Management</strong></td>
<td>Followed by these options, if applicable:</td>
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</tr>
<tr>
<td></td>
<td>Recreate DBMS Table. Recreates the data source table. You are asked to confirm this selection before the table is regenerated. (Note that the table will be dropped and recreated. During the process, data may be lost.)</td>
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<td></td>
<td>Delete All Data. Deletes all existing data. You are asked to confirm this selection before the data is deleted.</td>
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<td></td>
<td>Drop Table. Drops the table so that it is removed from the DBMS.</td>
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<tr>
<td></td>
<td>Insert Sample Data. Inserts specified number of sample records, populating all fields with counter values.</td>
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</tr>
<tr>
<td></td>
<td>Show/Modify Data. Opens a window that shows the data in the data source with buttons you can click to insert values, filter values, reload the data source, and customize the view.</td>
<td></td>
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</tr>
<tr>
<td></td>
<td>Reorganize. Recreates the data source table preserving original data.</td>
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</tr>
<tr>
<td><strong>Note</strong>:</td>
<td>This option is not available in the Web Console.</td>
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<tr>
<td>Option</td>
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<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Impact Analysis</td>
<td>Generates a report showing where this synonym is stored and used, with links to the synonym instances. Impact Analysis reports enable you to evaluate changes before they are made by showing which components will be affected. See the Server Administration manual for details about Impact Analysis reports.</td>
<td></td>
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</tr>
<tr>
<td>Dependencies</td>
<td>Analysis</td>
<td></td>
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</tr>
<tr>
<td>Download</td>
<td>Downloads the synonym to your PC.</td>
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</tr>
<tr>
<td>Copy</td>
<td>Copies the synonym to the clipboard.</td>
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<td></td>
</tr>
<tr>
<td>Delete</td>
<td>Deletes the synonym. You are asked to confirm this selection before the synonym is deleted.</td>
<td></td>
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<td></td>
<td></td>
</tr>
<tr>
<td>Cut</td>
<td>Deletes the synonym and places it on the clipboard.</td>
<td></td>
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</tr>
<tr>
<td>Rename</td>
<td>Renames the synonym.</td>
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</tr>
<tr>
<td>Privileges</td>
<td>Shows the security subjects on the server and the privileges they have to this synonym.</td>
<td></td>
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<td></td>
</tr>
<tr>
<td>Properties</td>
<td>Displays the properties of the synonym, including physical location, last modified date, description, and privileges.</td>
<td></td>
<td></td>
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<td></td>
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</tr>
</tbody>
</table>

**LNGPREP Utility: Preparing Metadata Language Files**

The LNGPREP utility extracts TITLE, DESCRIPTION, CAPTION, and PROMPT attribute values from application Master Files into specially formatted language translation files for each language you need. Once you have the contents of these language files translated, your users can run these applications in the language they choose.

LNGPREP does two things. It extracts attribute values from a Master File into language files, and it inserts or updates the TRANS_FILE attribute in the Master File with a value identifying the application folder where the language files reside and a prefix used for naming the set of language files. If the Master File is part of a cluster, LNGPREP will extract translatable strings from every Master File referenced in the cluster, and will update each with the same TRANS_FILE value.

LNGPREP requires an input file listing the three-character codes of the languages you need.
The name of each language file starts with the prefix specified in the TRANS_FILE value, followed by a three-character language code, and the extension .lng.

For example, assume the language input file contains the French and Spanish language codes:

fre
spa

If the Master File specifies:

trans_file = xlate/xl_

The language translation files would be in the xlate application folder, named:

xl_fre.lng for French
xl_spa.lng for Spanish

Reference:  The Base Language File

Each Master File must have a single base language in which the DESCRIPTION, TITLE, CAPTION, and PROMPT attributes are specified. This language need not be English.

LNGPREP extracts these attribute values into the base language file, whose language code, for historical reasons, is eng. In this case, eng does not mean English. It means whatever language the Master File is written in.

The base language file (prefixeng.lng) should never be hand edited. All other lng files must be hand edited by translators, to translate the string values from the base language to the appropriate language.

Translating Applications into English

Since language code eng is reserved to mean base language, you cannot use it to contain English translations of an application whose base language is not English. In those cases, use any of the other English dialect language codes, such as AME, UKE, CAE, or AUE. For example, if the base language is German, specify AME in the languages file, run LNGPREP, and it will produce prefixeng.lng and prefixame.lng files, both in German. Translate the contents of prefixame.lng into English. Leave prefixeng.lng untouched.
Each language file contains a line for each attribute value from a related set of Master Files. Each attribute value has a unique index number assigned to it. For example, if the Master File contains FIELDNAME=PRODUCT_CATEGORY, TITLE='Product,Category', and that TITLE happens to be the 39th translatable attribute value, LNGPREP will produce lng files all containing the line:

\[39 = \text{Product,Category}\]

Your French translator will edit prefixfre.lng, leaving the index values unchanged while translating the string values, producing, in this case,

\[39 = \text{Produit,Catégorie}\]

At run time, when the TITLE for field PRODUCT_CATEGORY needs to be displayed, if WebFOCUS is configured for LANG=FRE, WebFOCUS looks up "Product,Category" in prefixeng.lng, finds index value 39, looks up 39 in prefixfre.lng, and displays the TITLE as "Produit,Catégorie."

**LNGPREP Modes**

You can run LNGPREP from the Web Console using the *Prepare Translation Files* option, or you can run it using syntax. In either case, you must first create a configuration file containing the three-character language codes for each translation file you need, one language code on each line. The first invocation of LNGPREP for a given Master File adds the TRANS_FILE attribute in that and all related Master Files, creates the base language file by scanning the Master Files for supported attribute values, and creates a copy of the base language file with the correct name for each additional language. Then, a translator has to translate the values in each additional language file from the base language to the correct language for that file.

On each subsequent run, LNGPREP will check for updates to the list of related Master Files and attribute values and update the files as needed. Translators will then have to translate any attribute values added to the language files.

**Reference: LNGPREP Best Practice**

The recommended best practice is to create an app directory solely for the purpose of containing .lng files, and use this appname and a common prefix value for all LNGPREP commands. In addition, put the languages fn.cfg file in this app folder. This will create one set of .lng files for all apps, minimizing the time and effort spent on translation.
Procedure: How to Prepare Metadata Language Files Using the Web Console

1. Right-click a synonym, select Metadata Management, then Prepare Translation Files, as shown in the following image.

The Set Translation Files page opens, as shown in the following image.

2. Enter the following values or accept the defaults.

   Application for Translation Files
   Is the name of the application where the language files will be stored. You can click the ellipsis to select an application from the current application path. By default, it is the application where the synonym resides.

   Prefix
   Is the prefix value for the translation files for the selected synonym.

   Languages File
   Is the file containing the list of language codes for which translation files should be prepared. The file must have the extension .cfg, be stored in an application directory on the application path, and have one language code on each line. You can click the ellipsis to select the application where the languages file is stored.

3. Click OK.
The language files are prepared using the application, prefix, and languages configuration file you specified. A status page will open listing the language files created and the Master Files processed.

**Syntax:** How to Run the LNGPREP Command Using Syntax

```
LNGPREP FILE n_part_name LNGAPP appname LNGPREFIX prefix
   LNGFILE appname/fn
```

where:

- **n_part_name**
  Specifies the n-part (app1/app2...) name of a Master File.

- **appname**
  Specifies the location where .lng files will be written and updated.

- **prefix**
  Specifies the literal characters that will precede the three-character language code in the names of the .lng files.

- **appname/fn**
  Specifies the **appname** and **filename** of a user-created .cfg file containing the list of three-character language codes, one per line. For example, the following file named langretail.cfg contains language codes for American English, French, and Japanese:

  ```
  ame
  fre
  jpn
  ```

**Example:** Sample LNGPREP Command

Assume the lnglist.cfg file contains the language codes fre (French) and spa (Spanish):

```
fre
spa
```

Issue the following LNGPREP command:

```
LNGPREP FILE weather/forecast LNGAPP xlate LNGPREFIX tq_ LNGFILE xlate/lnglist
```
Alternately, you can right-click the forecast synonym, point to Metadata Management, and click Prepare Translation Files. The Set Translation File for weather/forecast.mas page opens. Enter the values shown in the following image and click OK.

**Set Translation Files for weather/forecast.mas**

Application for Translation Files: xlate
Prefix: tq
Languages File: xlate/linglist.cfg

The following language files will be created:

- xlate / tq_eng.lng
- xlate / tq_fre.lng
- xlate / tq_spa.lng

The Master File weather/forecast.mas will be updated with the following attribute

TRANS_FILE= xlate/tq_

Translators then have to translate the values in xlate/tq_fre.lng and xlate/tq_spa.lng.

**Introduction to Wizards**

The SQL Wizard (also known as the Connect to Data Wizard) leads you through the creation of metadata. The Upload Wizard leads you through the process of uploading a data file from your local machine to the server. Quick Copy lets you load a new file, replace an existing file, or append a new file to an existing file.

After each process is complete, the wizard lets you run or save a test query and schedule or email the final output.

Many of the options available for the metadata creation and upload processes are shared with the Data Assist tool, described in *Using Data Assist*.

To upload an image file to an application, right-click the application, point to New, and click Upload Image Files.
Using the SQL Wizard

The SQL Wizard provides a step-by-step process for connecting to data, creating a summary table or cluster synonym and running a report. It can be used to create metadata for different types of data sources. Some of options and parameters vary depending on the type of data source. The wizard enables you to:

1. Configure an adapter, create a new connection, or change connection parameters.
2. Import metadata.
3. Edit metadata.
4. Generate a test query.
5. Run, submit with email or schedule the report.
6. Return to the console.

The SQL Wizard displays these steps as a menu, as shown in the following image.

When you complete a task, the wizard automatically moves to the next step.

To exit the wizard and return to the full console, click Full Console.

Procedure: How to Access the SQL Wizard

Access the SQL Wizard by clicking the SQL Wizard icon on the Applications page ribbon.

The SQL Wizard opens, as shown in the following image.

Procedure: How to Use the SQL Wizard to Configure an Adapter, Create a New Connection, or Change a Connection

1. Select one of the following options:
   - New Adapter/Connection
- Add Connection
- Change Connection

2. If you select New Adapter/Connection, the Configure Adapter page opens. Select the radio button for the adapter and click Next.

Note: You can click any of the column headings to sort the available adapters.

The Add Adapter to Configuration pane opens. Enter the parameters for the specific adapter and click Configure. For information on the parameters, see the Adapter Administration manual.
3. If you select *Add Connection*, the Add Connections page opens. Select an radio button for an available adapter and click *Next*.

The *Add Connection* page opens. Enter the parameters for the specific adapter and click *Configure*. For information on the parameters, see the *Adapter Administration* manual.
4. If you select Change Connection, the Edit Connections page opens. Select the radio button for the connection and click Next.

![Edit Connections Page]

**Note:** You can click any of the column headings to sort the available connections.

The Change Connect Parameters page opens. Change the parameters for the specific connection and click Configure.

5. Click Next to move to the Import Metadata step.
**Procedure:** How to Use the SQL Wizard to Import Metadata

After completing the Connection step, the wizard moves to the Import Metadata step where you can create one or more synonyms.

The Select connection to create synonyms page opens, as shown in the following image.

1. Select the radio button for the adapter and click **Next**.

   **Note:** You can click the *Adapter* or *Connection* column to sort the available adapters.
The Select Synonym Candidates pane opens.

Select Synonym Candidates for MS SQL Server (wfretail)

- **Restrict object typ...** Tables, Views and Other Objects

Further restrict search to:
- Tables
- Views
- Synonyms

- **Select database** Default database
- **Filter by owner/schema and object name**

2. Select or enter the object types, database, and filtering conditions, and click Next.

   For additional information on the parameters, see the *Adapter Administration* manual.

   The *Create Synonym* page opens.
3. Select one or more tables,

You can select or enter values for:

- Miscellaneous parameters such as cardinality (whether to reflect the number of rows in a table) and whether to use dynamic columns (retrieve metadata dynamically from the data source).

- Data type mappings.

- Whether to decompose date fields into their components (precision for integer and floating point fields, and scale for floating point fields).

- The date format to use.

- Whether to activate geographic role assignment.

- The target application.
The wizard moves to the Edit Metadata step.

**Procedure:** How to Use the SQL Wizard to Edit Metadata

After completing the Import Metadata step, the wizard moves to the Edit Metadata step. This step creates a BV+ logical view in the synonym using the Business View pane. For information about BV+, see *Business View Plus (BV+)* on page 350.

The Edit Metadata page opens, as shown in the following image.

![Edit Metadata Page](image)

1. Use options on the ribbon and right-click options in the data panes to delete items, insert child tables, add joins, add geographic roles, and see sample data.

All of the options are described in *Wizard Metadata Screen Reference* on page 296.
2. When you are finished editing the metadata, click **Save and Next**.
   The Save As dialog box opens.

3. Enter a name for the synonym in the **File Name** field and click **OK**.
   The Test Query pane opens.

**Procedure:** How to Use the SQL Wizard to Generate a Test Query

The Test Query page has three panes, as shown in the following image.

The left pane lists the metadata available for the query. The right pane has categories in which you can place the data for summation, sorting, and filtering.

The ribbon provides Undo and Redo actions.

1. Drag fields from the **Metadata** list to the **Query** list in the appropriate categories for the query you are designing.

2. You can select options for the query in the Query section of the ribbon.

   You can generate the query output:

   - As a report or a chart. The chart types available are bar chart, pie chart, map, line chart, scatter chart. You can use the **Chart View** button to change the orientation and style of the chart.

   - As interactive (with drilldowns) and with breadcrumbs.
As a HOLD file.

You can use the Load Options button to specify the target adapter and table, whether to load into a new table using various techniques or to append or merge to an existing table, bulk load (if available), and the application for the target synonym.

3. You can add many other options to the query, as described in *Upload Wizard*.

4. Click *Save and Next*, to save the query, or choose one of the Run options from the Test button in the Diagnostics section of the ribbon, to run the query immediately.

If you clicked *Save and Next*, the Save As dialog box opens. Assign a name for the query, and click *OK*.

The Run, E-Mail, Schedule page opens

If you selected *Run*, the query runs and the results display in the output pane.

**Procedure:** How to Use the SQL Wizard to Run, Email or Schedule a Report

1. Click *Run, E-Mail, Schedule* from the ribbon or the navigation pane.

   The Run, E-Mail, Schedule pane opens, as shown in the following image.

2. Select the radio button for a report.
3. Click Run to run the report.

4. Click Submit with E-Mail to submit the procedure and specify start or completion email.

   The Submit procedure with E-Mail pane opens, as shown in the following image.

   ![Submit procedure with E-Mail pane](image)

   Fill in the appropriate email fields for the email options you want.

5. To schedule the procedure, click Run at a specific date and time, and enter a date and time.

   The Manage Schedule and E-Mail for procedure pane opens, as shown in the following image.

   ![Manage Schedule and E-Mail pane](image)

6. Click Submit.

For information on email and scheduling options, see Sending an E-mail Notification for a Procedure on page 414 and Scheduling a Procedure on page 404.

**Using the Upload Wizard**

The Upload Wizard enables you to upload data files from your local machine to server application folders and to load them into a DBMS for use in creating synonyms and reports. You can then run a report with or without email, or schedule it.

To upload an image file to an application, right-click the application, and select New, then Upload Image Files.

You can configure the Upload Wizard to validate and upload a specific list of file extensions. The wizard enables you to:

- Prepare files for upload (store them in a temporary location for editing prior to upload).
- Edit the synonyms generated for the prepared files.
Create test queries.

Run, submit with email, or schedule the procedure.

Return to the console.

The Upload Wizard displays a menu, as shown in the following image.

When you complete a task, the wizard automatically moves to the next step.

Reference: **Upload Support for Validation of File Extensions**

You can configure uploads to operate on a specific list of file extensions.

1. On the Applications tab, click the *Application Settings* button on the ribbon, or right-click the Application Directories tree and select *Application Settings* from the shortcut menu.

   By default, the upload_allowed entry field contains a comma-separated list of all file extensions that the server can upload.

2. Edit the list to contain only the file extensions that should be allowed.

3. Click *Save and Restart Server*.

   After the server has restarted, the Upload Wizard will not show files with unsupported extensions if you click *Select Upload File*. If you try to drag a file with an unsupported file extension to the Upload Wizard, a message will be displayed that it is an invalid type of file.

**Starting the Upload Process**

From the Web Console, click the *Upload Wizard* icon, as shown in the following image.

The Upload Wizard opens to the Upload pane, as shown in the following image.

Drag and Drop file here to upload

or

Select File
Drag and drop a file or click Select Upload File and navigate to a file on your file system.

For information about preparing data for upload, see Preparing Data for Upload on page 292.

To exit the Upload Wizard, click Full Console.

Editing Metadata

When you upload a file, the data is staged in a temporary area before actually loading the data so that you can enhance the synonym prior to loading. For example, you can add virtual fields, joins, filters, groups and calculated values to the synonym prior to loading.

The following image shows the initial metadata editing page for an Excel file.

For information about the options on this page, see Wizard Metadata Screen Reference on page 296.

When you have finished editing the metadata, click Load and Next.

Creating a Test Query

Once you have loaded the data, you can create a test query.
**Procedure:** How to Use the Upload Wizard Create a Test Query

When the Wizard moves to the Test Query step, the Create Test Query pane opens, as shown in the following image.

1. Create a query by dragging objects from the Metadata pane to the appropriate query category in the Query pane, as shown in the following image.

The query output displays in the Output pane.
You can create different types of query output, such as:

- A report. Use the Report Formats button to select an output format, such as HTML, PDF, Excel 2007, or PowerPoint.

- Several types of charts, such as bar and pie charts. Use the Chart View button to select a chart layout and orientation.

- A map, when geographic data is part of the query.

- A HOLD file that is loaded into a table in the currently selected target adapter. Click Load Options to edit the load options.

You can click View to show and hide panes and grid lines.

You can click Advanced to change certain parameter values and limits.

2. Click Save and Next to open the Save As dialog box and save the query.

**Procedure: How to Use the Upload Wizard to Run, Email, or Schedule a Procedure**

After you have created a test query with the Upload Wizard, you can run the procedure, submit it to run with email, or schedule it.

1. Click Run, E-Mail, Schedule from the ribbon or navigation pane.

   The Run, E-Mail, Schedule page opens, as shown in the following image.

2. Click Run to run the report.
3. Click *Submit with E-Mail* to submit the procedure and specify start or completion email. The Submit procedure with E-Mail pane opens.

4. To schedule the procedure, click *Manage Schedule and Email*.

For information on email and scheduling options, see *Sending an E-mail Notification for a Procedure* on page 414 and *Scheduling a Procedure* on page 404.

To exit the Upload Wizard, click *Full Console*.

### Preparing Data for Upload

Uploading data to WebFOCUS can be made easier if you familiarize yourself with the data file first and ensure that it is properly formatted for upload, so geographic data, hierarchies, and other important aspects of your data are recognized. This is important so that the synonym created for your uploaded data provides the basis for quality analytical content.

You can use the following techniques to prepare your data for the uploading process.

**Naming Conventions and Microsoft Excel Sheet Names**

For Excel spreadsheets, the name of the file is not important but the name of the worksheet that contains your data is used to generate the synonym name. For the best results, follow the guidelines below:

- Ensure that the worksheet name is meaningful. For example, Store Sales is better than Sheet1.

- Remove special characters from the worksheet name. Spaces will be converted to underscores but all non-alphanumeric characters should be removed from the name, such as:

  ```
  /\^-!@#$%^()+=\{|};
  ```

- Remove or replace NLS characters with standard alphanumeric characters.

The image below shows a worksheet with a meaningful name, Retail Sales.
While you have an opportunity to edit the worksheet name within the Upload wizard, doing it in Excel may be preferable. Note that your spreadsheet data and column titles may contain National Language Support data and special characters.

For CSV files, there is no worksheet name, so the CSV file name is used to generate the synonym name. For this reason, all of the limitations identified for Excel worksheet names apply to the CSV file name. Be sure to check and adjust the file name prior to the upload.

**Removing Introductory Information**

Sometimes, an Excel spreadsheet contains formatted headings in the first few rows. This information cannot be imported into WebFOCUS and should be removed. Delete the introductory rows and save the file before uploading. Alternatively, you can define a data range within your worksheet and leave the introductory information in place. The following image shows an example spreadsheet with a heading and subheadings highlighted.

**Placing Column Titles in the First Row**

For data to be useful in WebFOCUS, your data columns must be identified and properly described in the synonym that is generated during the upload process. You can make this easier by ensuring that the first few rows of your Excel spreadsheet contain column titles that are meaningful to you and to other users who will be using it. An example of meaningful column titles is shown in the following image.
If your spreadsheet has more than one row of column titles, WebFOCUS can merge the information when creating the synonym. You will be given an option to specify how many first rows of the Excel file contain title information in the Upload wizard.

**Removing Aggregated Information**

Excel spreadsheets may contain subtotals, grand totals, and other non-data row information. Data aggregation is performed by WebFOCUS, so you should remove these kinds of rows from your spreadsheet and save the file before uploading it.

**Using Excel Name Ranges**

Data ranges defined within your Excel worksheet can be helpful for the following reasons:

- Your worksheet may have introductory information, such as formatted headings or non-data information, in the first few columns.
- You may not want to import all of the data columns found on your worksheet.

You can define a data range in your worksheet to remove the data that you want WebFOCUS to process during upload, and leave your spreadsheet in its original format. An example of this is shown in the following image.

---

**Preparing Hierarchical Data Columns**

WebFOCUS recognizes columns of data that have hierarchical relationships. This is useful because the field names are arranged more logically in and because it facilitates Auto drill capabilities in the content. Auto-drill lets you drill up and down a field hierarchy automatically, making the content engaging and useful.
To help WebFOCUS recognize hierarchical columns correctly, ensure that the column titles begin with a common word or words and are arranged left-to-right in the correct top-to-bottom direction, as shown in the image below. In the Upload wizard, you can define and edit dimension hierarchies prior to creating the synonym. You can also do this prior to the upload in Excel.

### Removing Date Formulas

Spreadsheets may contain a date column where the values are computed by Excel using a formula. You need to convert these computed values into simple values before uploading a spreadsheet. To remove date formulas, select a column, right-click, and then click *Copy*. Then right-click the selected column again, and click *Values*. This can be found under the Paste Options menu, which is highlighted in the following image. Menu options may vary by Excel release. Now you can see that each cell contains a date value, and WebFOCUS can decompose your dates into useful components for use in.
Wizard Metadata Screen Reference

When you use the Upload wizard or Connect to Data wizard, your data opens in a wizard metadata screen, where you can preview and modify your synonym before you upload it to the target environment. The options available to you in this screen, in either wizard, are context sensitive. The following screen shows the metadata screen that opens when you upload a spreadsheet using the Upload wizard.

The wizard metadata screens consist of two sections:

- **Ribbon.** Provides access to data preparation functions that you can use to customize your synonym.
- **Panes.** Present areas of functionality that you can use to preview or modify the elements of the synonym.

**Ribbon**

The following image shows the ribbon of the wizard metadata screen that is available when you upload a spreadsheet.

The following sections describe the groups and functions of the wizard metadata screen ribbon. Some options are specific to the Upload wizard, while others are specific to the Connect to Data wizard.
Help

The Help group contains the Test, Tutorials, and Help buttons. You can use the Test button to open the Session Log window, clear the session log, view the synonym being prepared in a text window, and view a list of prepared worksheets.

The options in the Test button include:

**Session Log**

Opens the Session Log window. The session log contains all of the commands that have been processed for the current upload session. Using this window, you can filter the log file, clear the log file, download the log file to your machine, refresh the log, and manage your server agents.

**Clear Session Log**

Deletes all content from the log file.

**View MFD**

Opens the Master File being prepared in a text window. You can search for text within the Master File.

**View AFD**

Opens the Access File being prepared in a text window. You can search for text within the Access File.

**Prepared Worksheets**

Opens a window that lists the prepared Worksheets and the details of each, including the date on which it was prepared, the number of rows and columns, whether there is a header row, and the names of the target application, target synonym, target table, target adapter, and target connection. This option is available when you use the Upload wizard.

The Tutorials button opens two high-level documents that outline the main functions of the Upload wizard, including the basic flow of common procedures, and the Business View + capabilities.

The Help button opens the Web Console online Help.

**Undo/Redo**

The Undo / Redo group contains the Undo and Redo options. You can use these options to reverse the last action you performed, or to cancel your last Undo action. For example, if you renamed a field, but do not want to save it, you can click Undo.
Preparation

The Preparation group contains options that you can use to review your data and prepare it for upload. The options are only available when you use the Upload wizard, and include:

**Preparation Options**

Opens the Preparation Options dialog box, where you can set the following options for Excel spreadsheets.

**Scan all rows**

Scans all records to determine data type for each column

**Row scan limit**

Indicates how many worksheet rows are scanned to determine the formats of the columns. Set this value to 0 if you want to scan all of the worksheet rows.

**Extend character length**

Extends character length by the percentage specified.

**Column format recognition**

Sets the column format to loose or strict.

**Number of header rows**

Sets the number of rows used as a header row in the worksheet. Set the value to 0 if a header is not used.

**Add RowID Column**

Adds a row ID column to your data. This option is only available for Excel spreadsheets.

**Decompose Date fields into components**

Decomposes Date fields into Year, Quarter, Month, and Day components.

**Date Order**

Allows you to select a format in which the Date fields appear.

**Activate GEOGRAPHIC_ROLE assignment**

Assigns geographic roles based on column name analysis.
The following options are also available from the Preparations Options dialog box, when you upload a comma separated values (CSV) file:

**Non-printable Delimiter**

Defines whether the string in the delimiter field is a printable string or a non-printable decimal character.

**Field Enclosure**

Allows you to select an enclosure characters for each field from the number of available options, which include: none, single quote, double quote, space, and type-in enclosure. The default value is double quote.

**Header row**

Defines if the header line be used as column names.

**Preserve format**

Indicates whether the original data layout, including empty records and linefeeds, will be preserved.

**CODEPAGE**

Specified the code page for the stored data that will be added to the Master File of the generated synonym.

**CDN**

Continental Decimal Notation (CDN) determines the punctuation used in numerical notation for input data.

**Raw Data**

Displays the raw data of the file to be uploaded in the Output Pane.

**Error Check**

Produces informational messages, if the uploaded file contains inconsistent data, based on the first row of data. The Error Check result is displayed in the Output Pane.

**Templates**

The Templates group contains options that you can use to create and apply a template to your selected file. These options are only available when you use the Upload wizard, and include:

**Save**

Saves the existing synonym as a template.
Invoke

Opens the Select Template name dialog box, where you can choose a saved template that you created earlier.

Metadata

The Metadata group contains several data preparation options that you can use to enhance your data. This includes defining virtual fields, creating Compute and Variable fields, joining data sources, and pivoting rows of data into columns. The options include:

Define

Opens the Expression builder, where you can create a define field.

Compute

Opens the Expression builder, where you can create a compute field.

Variable

Opens the properties dialog box, which provides access to the following options:

Variable Name

Specifies the name of the variable.

Prompt Caption

A description of the variable that will appear in the prompt.

Default Value

Specifies the default value of the variable.

Prompt Values

Provides a drop-down menu of optional prompt values for the variable. The options are Input box, Static list of values, Static list of values/captions, Synonym based dynamic list of values, and Procedure based dynamic list of values.

Quoted

If selected, this option adds single quotation marks around the variable.

Usage Format

Provides a drop-down menu of date formats for the variable. The options are Integer, Character (fixed), and Decimal.
Join Editor

Opens the Join Editor dialog box, where you can join multiple worksheets to create a cluster.

DBA

Opens the DBA dialog box, where you can edit the access to your data. This option is available only when you use the Connect to Data wizard.

Pivot

Opens the Pivot Prepared Data dialog box, where you can pivot any repeating columns or groups of columns into rows.

Sample Data

The Sample Data group contains options that you can use to toggle the Autorun and Data Preview options On and Off, stop the current request, and view the Sample Data in the Output Pane to instantly visualize field values.

Autorun

Provides access to the following options:

Off

Disables autorun in the Output Pane.

On

Enables autorun in the Output Pane.

Data Preview

Provides access to the following options:

Off

Disables the display of data values in the Business View Pane.

On

Enables the display of data values in the Business View Pane.

Sample Data

Runs the Sample Data request in the Output Pane.

Options

The Options group consists contains the View and Options functions. You can use the View button to customize your view of the wizard you are using. You can use the Options button to specify options for generating and displaying the synonym and set upload limits.
Click View to access the following options to customize your screen:

**Reset View**
Reverts all your screen customizations to the default view.

**Grid Details**
Provides access to the following options:

**View as Columns**
Displays data in columns inside panes. This option is enabled, by default.

**View as Tooltip**
Displays data in tooltips, as you hover over fields.

**Table/Column Pane**
Provides access to the options that control placement of the Table/Column Pane on the screen, such as:

**Tile Horizontal**
Displays panes on the screen in the horizontal succession. This option is enabled, by default.

**Tile Vertical**
Displays panes on the screen in the horizontal succession.

**Show**
Displays the Table/Column Pane on the screen.

**Hide**
Hides the Table/Column Pane from view. This option is enabled, by default.

**Business View Pane**
Provides access to the options that control placement of the Business View Pane on the screen, such as:

**Show**
Displays the Business View Pane on the screen.

**Hide**
Hides the Business View Pane from view. This option is enabled, by default.
**Filters/Groups Pane**

Provides access to the options that control placement of the Filters/Groups Pane on the screen, such as:

- **Show**
  
  Displays the Filters/Groups Pane on the screen.

- **Hide**
  
  Hides the Filters/Groups Pane from view. This option is enabled, by default.

**Output Pane**

Provides access to the options that control the placement of the Output Pane on the screen, such as:

- **Show Floating**
  
  Undocks the Output Pane, so it can be moved around the screen.

- **Show Docked**
  
  Docks the Output Pane on the right side of the screen. This option is enabled, by default.

- **Show Maximized**
  
  Enlarges the Output Pane to the size of the screen.

- **Hide**
  
  Hides the Output Pane.

**Multiple Output Panes**

Provides access to the options that control the appearance of multiple Output Panes on the screen, such as:

- **Show All Tabbed**
  
  If this option is selected, all output requests are shown in the Output Pane in tabs. This option is selected, by default.

- **Show Only Latest**
  
  If this option is selected, the single-tab Output Pane is reloaded to display the latest output request.
Click Options and select Advanced to open the Options dialog box and select the following synonym creation options:

**Synonym Editor**
Provides access to the following options, when you use the Connect to Data wizard or Data Assist.

**Support extended options**
Allows you to insert sort object styling.

**Column Management**
Provides access to the following options.

**Name display strategy**
You can select how the column names are displayed in the Tables/Columns Pane from one of the following choices:

- **Name.** Assigns the FIELDNAME attribute from the synonym as the column name displayed in the Tables/Columns Pane.

- **Title.** Assigns the TITLE attribute from the synonym as the column name displayed in the Tables/Columns Pane. TITLE is the default value.

- **Description.** Assigns the DESCRIPTION attribute from the synonym as the column name displayed in the Tables/Columns Pane.

- **Alias.** Assigns the ALIAS attribute from the synonym as the column name displayed in the Tables/Columns Pane.

**Function display strategy**
Selects the functions information that displays in the Expression Builder, and on the shortcut menu for a column, when you add a function to the synonym. Select one of the following values:

- **Syntax.** The function syntax (function name and parameters) is displayed. This is the default value.

- **Short Description.** A short description of what the function calculates is displayed.
Language Generation Options

Provides options for generating field names and synonym references in the synonym being prepared.

**Use segment to qualify field reference**

Specifies when the segment name should be added to the field name in order to qualify the field name. Select one of the following values:

- □ For duplicate fields. Uses the segment name to qualify the field name only when multiple segments contain the same field name. This is the default value.
- □ Always. Uses the segment name to qualify the field name.

**Use application name to qualify synonym reference**

Specifies whether synonym references in the synonym being prepared will include the application name. Select one of the following values:

- □ Yes. Adds the application name to synonym references (appname/synonymname). This is the default value.
- □ No. Does not add the application name to synonym references.
Limits

Sets limits for working with the Upload or Connect to Data wizard.

**Maximum number of rows for test**

Sets the maximum number of rows of sample data displayed. The default value is 50.

**Maximum number of columns for test**

Sets the maximum number of columns of sample data displayed. The default is 999999.

**Maximum number of identical error messages**

Sets the maximum number of identical error messages that can be generated by the wizard.

**Random Sampling limit (in %)**

Defines the percentage for the random sample that is used for statistical analysis.

**Undo/Redo Limit**

Sets the maximum number of undo and redo actions supported. The default value is 50.

**Omit missing (null) values in Data Profiling charts**

Omits any missing or null values in the data source.

Load

The Load group contains the Load Options and Load Data items. These options are only available when you use the Upload wizard.
Click Load Options to select the following data loading options. These options may change depending on the target adapter selected.

**Load Option**

Provides access to the following options:

**New**

Uploads a new worksheet to create a synonym.

**Append Existing Data**

Adds new data to the existing synonym without changing the structure and parameters of the synonym.

**Merge with Existing Data**

Merges new data with the existing synonym.

**Adapter**

Allows you to select a database, in which the unloaded data is stored.

**Connection**

Specifies a connection for the selected adapter.

**Synonym Application**

Specifies the application directory for the synonym. Click the ellipsis button to change this directory.

**Synonym**

Specifies the name of the synonym, as appears in the repository. By default, the name is the same as the name of the source worksheet.

**Data File**

Contains the name of the DFIX target data file in the database. This option is only available if you are uploading a .CSV file.

**Table Name**

Indicates the name of the target table in the database.

**Bulk Load**

Specifies the method of loading data. This option is enabled, by default.

**Key columns derived from**

Contains a list of candidate fields from which you can select one or more to be used as the primary key of the target table.
Field Delimiter

Allows you to select a column separator from the number of available options, which include: none, comma, tab, pipe, space, semi-colon, colon, type-in delimiter. The default value is comma. This option is only available if you are uploading a .CSV file.

Header row

Defines if the header line be used as column names. This option is only available if you are uploading a .CSV file.

Field Enclosure

Allows you to select an enclosure characters for each field from the number of available options, which include: none, single quote, double quote, space, and type-in enclosure. The default value is double quote. This option is only available if you are uploading a .CSV file.

Overwrite Existing Synonym

Overwrites the existing synonym with the same name.

Click Load Data to upload your synonym to the repository without leaving the Upload wizard. The Load Data button also brings up the Load Options dialog box, allowing to review and modify your loading parameters.

Load and Next

The Load and Next function uploads your synonym to the repository and brings you to the next screen, where you can select how to use your synonym. This option is only available when you use the Upload wizard.

Save and Next

The Save and Next function saves your changes and brings you to the next screen, where you can select how to use your synonym. This option is only available when you use the Connect to Data wizard.

Panes

The wizard metadata screen contains the following panes:

- Table/Column
- Business View
- Filters/Groups
Output

The default view displays Business View and Output Panes. You can customize the view of your screen by clicking View on the ribbon.

Table/Column Pane

The Table/Column Pane displays the fields in the same order as they are displayed in the source file.

The Table/Column Pane is shown in the following image.

The Table/Column Pane has the following options:

Display

Toggles between the Columns, Business View, and the Join Editor view of folders options. The Join Editor option launches the Join Editor dialog box, where you can create clusters.
Find

Opens the search field, where you can type the name of the field that you want to find and allows you to modify your search options.

View

Provides access to the following options:

**Expand All**

Expands all nodes, folders, and hierarchies.

**Collapse All**

Collapses all nodes, folders, and hierarchies.

**Choose Columns**

Opens the Choose Columns dialog box, where you can select the columns that you want to display in the Business View Pane.

**Reset to defaults**

Reverts the pane to its default view.

Business View Pane

The Business View Pane shows you how the Upload wizard and Connect to Data wizard interpret and categorize your data. The numeric values, such as Gross Profit or Cost of Goods, are interpreted as measures. The alphanumeric values, such as Product or Geography, become dimensions. Dimensions, which categorize data, 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 assign dimension attributes to any dimension field, whether or not it is in a hierarchy. When applied to a field, attributes provide supplementary information that can be used for analysis or display. For example, in a Geography hierarchy, which includes the Country, State, and City dimensions, Population can be assigned as an attribute of the City dimension. Each category of data is represented by an icon. The following table identifies these icons and describes what they represent.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Identifies</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>📊</td>
<td>Measure group</td>
<td>Contains individual measures.</td>
</tr>
<tr>
<td>Icon</td>
<td>Identifies</td>
<td>Description</td>
</tr>
<tr>
<td>------</td>
<td>--------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>📈</td>
<td>Measure</td>
<td>Measure is a numeric field. It resides inside a measure group. Measures can be moved between measure groups and between measures and dimensions areas.</td>
</tr>
<tr>
<td>📁</td>
<td>Dimension folder</td>
<td>Contains dimensions, dimension hierarchies, and attributes.</td>
</tr>
<tr>
<td>🚹</td>
<td>Dimension Hierarchy</td>
<td>Resides inside the dimension folder and contains individual dimensions and associated attributes.</td>
</tr>
<tr>
<td>🐉</td>
<td>Dimension</td>
<td>Dimension is an alphanumeric field. It resides inside the dimension hierarchies. Dimensions can be moved between dimension folders, between and outside dimension hierarchies. You can move a dimension into a measure group and turn it into a measure. You can also move a dimension inside an attribute folder and turn it into an attribute.</td>
</tr>
<tr>
<td>📍</td>
<td>Attribute folder</td>
<td>Contains individual attributes associated with a dimension.</td>
</tr>
<tr>
<td>🏈</td>
<td>Attribute</td>
<td>Resides inside an attribute folder. Attributes can be moved between attribute folders. If you move an attribute outside an attribute folder, it inherits the identity of a hierarchical level to which it is moved.</td>
</tr>
</tbody>
</table>
The Business View Pane is shown in the following image.

The Business View Pane has the following options:

**Reset Defaults**
Eliminates all changes and reverts the view back to the initial categorization of your data.

**Flatten**
Removes dimension hierarchies and displays individual dimensions under the Dimensions folder.

**Display**
Toggles between the Columns, Folders, and Modeling View of Folders displays.

**Hide All**
Hides all fields from the view.

**Note:** When a field is hidden, it is moved to the Table/Column Pane. This pane is hidden, by default. For more information on how to access this pane, see *Options* on page 301.
**BV**

Opens a menu, where you can change BV_NAMESPACE=OFF and BV_NAMESPACE=ON modes for your session. By default, the wizards create a Business View structure in with BV_NAMESPACE=OFF, which adheres to a fixed structure of measures, followed by dimensions, hierarchies, levels, and attributes, using a folder structure in the synonym. You can insert new entries, but are limited to existing structure types. When you select BV_NAMESPACE=ON, you can insert new folders and increase the flexibility of your metadata.

**Find**

Opens the search field, where you can type the name of the field that you want to find and allows you to modify your search options. Any occurrence of the search string found in the pane is highlighted.

**View**

Provides access to the following options:

- **Expand All**
  
  Expands all nodes, folders, and hierarchies.

- **Collapse All**
  
  Collapses all nodes, folders, and hierarchies.

- **Choose columns**
  
  Opens the Choose Columns dialog box, where you can select the columns that you want to display in the Business View Pane.

- **Reset to defaults**
  
  Reverts the pane to its default view.
Each node in the Business View Pane opens a context-sensitive shortcut menu that can be used to insert and modify folders or fields, view sample data, perform statistical analysis and data preparation techniques. You can access these options by right-clicking each level. These shortcut menu options are conditional and depend on the type of an element and its place in the synonym structure. In addition, these options are different if you are editing your synonym in BV_NAMESPACE=OFF mode or BV_NAMESPACE=ON mode. The following list identifies the shortcut menu options for your synonym in both modes.

**Insert**

Depending on the context, provides access to the following options:

- **New Measure Group**
  Creates a new measure group inside this Measure Group folder.

- **New Dimension Folder**
  Creates a new dimension folder inside the Dimensions node.

- **New Parent/Child Hierarchy**
  Opens the Create a Parent/Child Hierarchy dialog box, where you can create a new hierarchy.

- **New Levels Hierarchy**
  Creates a new level hierarchy inside this dimension folder.

- **New Folder**
  Creates a new folder, which functions as a segment to provide a view of the synonym and to define the accessible fields and their relationships. You can assign a DV role, such as Dimension, Measure, or Attributes to each new folder that you create. This option is only available in BV_NAMESPACE=ON mode.

**Filter**

Opens the Filters/Groups Pane, where you can create or modify a filter.

**Character Function**

Provides a choice of preconfigured character functions that open in the Function Assist for New Define dialog box.

**Conversion Function**

Provides a choice of preconfigured conversion functions that open in the Function Assist for New Define dialog box.

**Geography Function**

Provides a choice of preconfigured geographical functions that open in the Function Assist for New Define dialog box.
**Numeric Function**

Provides a choice of preconfigured numeric functions that open in the Function Assist for New Define dialog box.

**Advanced Function**

Opens the Define dialog box, where you configure a new function.

**Grouping**

Opens the Filters/Groups Pane, where you can configure group values.

**Phonetic Grouping**

Opens the Filters/Groups Pane, where you can configure the phonetic algorithm of a group.

**Group Numeric (Binning)**

Opens the Binning wizard, where you can configure a numeric group.

**Aggregation Function**

Provides a choice of preconfigured aggregation functions that open in the Function Assist for New Compute dialog box.

**Analytic Function**

Provides a choice of preconfigured analytic functions that open in the Function Assist for New Compute dialog box.

**Advanced Aggregation**

Opens the Compute dialog box, where you can a compute field using advanced aggregation options.

**Properties**

Opens the Properties dialog box. For more information, see *Using the Properties Dialog Box* on page 318.

**Pivot**

Opens the Pivot Prepared Data dialog box, where you can pivot any repeating columns or groups of columns into rows.
**DV Role**
Opens a sub-menu that allows you to assign a DV role, such as Dimension (Standalone or Drillable), Measure, or Attribute, explicitly to a field or folder. You can also choose to have the field inherit its role from a parent. This role moves with the field if you drag it to another location in the BV+ structure. If you do not explicitly assign a DV role, the role changes as you move the object under a new parent, except if you drop it onto a field with the Drill Level role. This option is only available if you are in BV_NAMESPACE=ON mode.

**Geographic Role**
Opens a sub-menu, where you can configure a geographic role for the field.

**Create Hierarchy**
Transforms the dimension into a hierarchy. This option is only available for standalone dimensions.

**Remove Hierarchy**
Removes a hierarchy and displays all the items inside this hierarchy as individual dimensions.

**Remove from Hierarchy**
Removes the field from a hierarchy. This option is only available for the dimensions that are part of a hierarchy.

**Show/Hide Attribute**
Toggles between displaying or hiding attributes for the field.

**Sample Data**
Displays the sample data for all the measure groups inside this measure group folder in the Output Pane.
Data Profiling

Provides access to the following options:

Statistics
Displays statistic analysis of the field in the Output Pane.

Hex View
Displays the data in hexadecimal format.

Values
Displays the values for this field for the selected number of rows in the Output Pane.

Values (Bar Chart)
Displays the values for the field in a bar chart in the Output Pane. The chart is limited to 50 values.

Values (Pie Chart)
Displays the values for the field in a pie chart in the Output Pane.

Duplicate Values
Displays the duplicate values for this field for the selected number of rows in the Output Pane.

Outliers
Displays the outliers for this field in the Output Pane.

Impact Analysis
Displays the impact analysis results in the Output Pane.

Rename
Opens the Rename dialog box where you can rename the field.

Hide
Moves the field to the Table/Column Pane.

Note: This pane is hidden, by default. For more information on how to access this pane, see Options on page 301.

Cut
Cuts the field from its directory.
Paste

Paste an item inside the directory.

Using the Properties Dialog Box

You can use the Properties dialog box to change settings for your data, such as appearance, formatting, data descriptions, and others. The options in this dialog box change depending on the type of data you are editing.

An example of the Properties dialog box is shown in the following image.

The Properties dialog box is organized into various groups, as described below.

Note: The location of these properties within the different groups may change if you are using BV_NAMESPACE=OFF mode or BV_NAMESPACE=ON mode.

General Group

Contains general properties that can be applied to various elements.

FOLDER

Indicates the name of virtual segment that you have selected.

PARENT

Identifies the name of the parent, for the virtual segment that you have selected.

DESCRIPTION

Provides additional information about the folder that you are viewing. This is an optional attribute.
FIELDNAME
Indicates the name that is used to reference this data element in the request.

BELONGS_TO_SEGMENT
Identifies the segment where the field resides in the original Master File.

TITLE
Specifies an alternative report column title for the field.

Usage Format
Describes how to format a field when displaying it in a report or using it in a calculation.

Type
Allows you to select a data type for this field, as it is stored in the data source.

Length
Describes the length of data as it is stored in the data source.

Number of decimal places
Specifies the number of digits that follow the decimal point.

Options
Displays options for this field.

Negative
Allows you to select a format in which negative numbers are displayed.

Comma
Allows you to choose whether large numbers are displayed with a comma.

L - Leading zeroes
If selected, adds leading zeroes to a number.

S - Print blank for zero
Specifies whether to display the blank field, if the data value is zero.

Percent sign
For the percentage values, toggles between displaying a percentage sign only, or calculating the percentage value and displaying a percentage sign.

E - Scientific notation
If selected, only significant digits are displayed.
Currency
If selected, provides access to the Currency Code and Currency Symbol Position options.

Currency Code
Provides access to ISO currency code formats.

Currency Symbol Position
Indicates the position of the currency symbol.

Legacy Currency
Provides the extended currency symbol display options. Select a currency symbol that displays in the report output, regardless of the default currently symbol that is configured for National Language Support (NLS).

Component Order
Sets the order of the date components, such as MDYY or DMYY.

Month
Sets the display options for a month component.

Day of the Week
Sets the display options for the day of the week component.

Separator
Specifies the element that you can use to separate date components, such as with commas or hyphens.

DV Role
Identifies the dimension view hierarchy the property represents. These options include Dimension (Standalone), Dimension (Drill Level), Measure, Attribute, and Inherit from parent.

DBMS/Source Data Attributes
Contains supplemental properties that you can define for metadata.

ALIAS
Specifies the name of the field, as it appears in the synonym. If you are using BV_NAMESPACE=ON mode, this property appears under the General group.

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

Type
Allows you to select a data type for this field, as it is displayed in a report or used it in a calculation.
**Length**

Describes the length of data as it is displayed in a report or used in a calculation.

**DATEPATTERN**

Specifies the date pattern that is used for conversion from a date or date time that is stored as an alphanumeric field to a data or data time format.

**MISSING**

If selected, allows null values to be entered into and read from a field in data sources that support null data.

**Miscellaneous Group**

Contains supplemental properties. All properties in the Miscellaneous group are disabled, by default.

**REDEFINES**

Enables you to redefine or recompute a field name that exists in more than one segment. A DEFINE expression may not contain qualified field names.

**WITH**

Associates the DEFINE with a real field from the synonym.

**DESCRIPTION**

Creates an attribute for comments and remarks within a field.

**ACCEPT**

Creates an attribute that can be used to populate an auto-prompt dialogue box or to validate data as it is entered into a field from a MODIFY procedure.

**PROPERTY**

Indicates the place of the field in the hierarchy of the Master File.

**REFERENCE**

Shows field attributes, such as physical parent/child relationships among the elements in the file.

**DATASET**

Specifies a physical name of the data source or alternate index.

**FIELDTYPE**

Specifies the type of the field.

**I - Index**

If selected, the field is displayed as an index field.
R - Readonly
If selected, the field is displayed as a read-only field.

Prompt Values
Adds optional prompt values for a define.

ACCESS_PROPERTY
Specifies access options for the field's data. If you are using BV_NAMESPACE=ON mode, this property appears under the General group.

INTERNAL
If selected, the field does not appear in the list of available fields or Sample Data. If you are using BV_NAMESPACE=ON mode, this property appears under the General group.

NEED_VALUE
If selected, the field requires a value to access the data.

Select By
Allows you to set a selection parameter. The choices are: value, range, and multiple values.

HELPMESSAGE
Allows you to add a help message to the field.

GEOGRAPHIC_ROLE
Defines a geographic role of the field.

TEMPORAL_PROPERTY
Specifies a temporal property of the field.

USE_STYLE
Allows you to select a style for the field.

Filters/Groups Pane
The Filters/Groups Pane automatically opens when you create a new filter or group. When you open two or more items at the same time, they display nested in the same pane.
An example of the Filters/Groups Pane is shown in the following image.

Depending on the field type, the Filters/Groups Pane displays the following options:

**Find**

Opens the search field, where you can type the name of the field that you want to find and allows you to modify your search options.

**Expand**

Maximizes the section of the pane.

**Drop-down arrow**

Provides access to the following options for filters:

**Display**

Determines a display format for the filter. The options include: text box, double list, check-box list, pull-down list, and slider. The default option is slider for Numeric fields and check box for all other fields.
**Relation**

Creates a relational expression. The options include: EQ, NE, LT, GT, LE, GE, and Range. The default value is Range for Numeric and EQ for all other fields.

**Values**

Toggles between showing and hiding the NULL values for this field.

**Hide Filter Card**

Removes filter data from the Filters/Groups Pane, while leaving the pane open.

**Delete Filter**

Deletes the filter from the synonym.

**Properties**

Opens the Filter properties dialog box, where you can change the Title for the filter, and view its Name and Base field name properties.

**Move Up**

Moves the filter up in the Filters/Groups Pane.

**Move Down**

Moves the filter down in the Filters/Groups Pane.

Provides access to the following options for groups:

**Display**

Determines a display format for the group. The options are: Double List and Single List. The default value is Single List.

**Add all shown values to a new group**

Selects all values and adds them to a new group.

**Create a New Group**

Creates a new empty group, to which you can add values manually.

**Edit properties**

Opens the Edit properties dialog box, where you can edit the Name, Title, and Default Value properties.

**Hide Group Card**

Removes the group data from the Filters/Groups Pane.
Move Up

Moves the group up in the Filters/Groups Pane.

Move Down

Moves the group down in the Filters/Groups Pane.

Additionally, if the list of values spans through multiple pages, you can increase or decrease the number of values displayed on each page by clicking the Increase Page Size or Decrease Page Size buttons. You can use the First Page, Previous Page, Next Page, and Last Page buttons to navigate between pages.

Output Pane

The Output Pane displays data and status messages for various features. The Output Pane is shown in the following image.
The Output Pane has the following options:

**Find**

Opens the search field, where you can type the name of the field that you want to find and allows you to modify your search options.

**View**

Provides access to the following options:

**Expand All**

Expands all nodes, folders, and hierarchies.

**Collapse All**

Collapses all nodes, folders, and hierarchies.

**Choose columns**

Opens the Choose Columns dialog box, where you can select the columns that you want to display in the Business View Pane.

**Reset to defaults**

Reverts the Pane to its default view.

If more than one tab is open, you can right-click a tab to access the tab menu, as shown in the following image. The menu allows you to close all other tabs, close tabs to the right, or show only the latest tab.

![Tab menu example](image)

**Using Data Assist**

Data Assist is an environment for managing and editing Synonyms. The number and types of changes you can make to synonyms has been greatly expanded.
Introduction to Metadata

Metadata is data about data. Metadata describes the characteristics of your data sources and provides the information needed 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.

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 used 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), dimensions, hierarchy levels, or attributes.

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 can be categorized as measures. Numeric fields that cannot be summed, such as product number and order ID, are not categorized 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.
A dimension is a way to categorize data or sort output. You can use a dimension to analyze and compare measures. Generally, dimension fields are alphanumeric fields such as product. Certain dimension fields can be organized into hierarchies to define the relationships between the fields in the hierarchies and provide the information needed for the AUTODRILL feature. For example, a Geography hierarchy can contain the Continent, Country, State, and City fields. On report output, with AUTODRILL turned on, links will be provided on report or chart output that let you drill down the hierarchy levels to more detailed reports or charts. You can also define dimension fields that are not part of a dimension hierarchy.

An attribute is a field or collection of fields that add additional information about a dimension. Using the Business View Plus (BV+) feature, you can create a view of the data that represents its business use by creating virtual segments called folders and adding fields to the folders. You can reuse fields in multiple folders. You can then categorize those folders and fields as measures (facts), dimensions, hierarchy levels, or attributes. Only the folder structure, not the real segments will be visible in the WebFOCUS tools and be available for use in requests. For information about BV+, see Business View Plus (BV+) on page 350.

### Accessing Data

When WebFOCUS accesses data, it 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. WebFOCUS 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 configured, 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 answer 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 Synonyms

Synonyms are useful because they insulate client applications from changes to the location and identity of a request. You can move or rename a request without modifying the client applications that use it. You need to make only one change, redefining the request synonym on the server. Synonyms provide support for the extended metadata features of the server, such as virtual fields and security mechanisms. Creating a synonym generates a Master File and an Access File.

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 Web Console, the Data Management Console (DMC), or the Metadata canvas in App Studio.

Although, you can use Data Assist to create a new synonym, the situations in which you need to do this are extremely rare. The Web Console, DMC, and Metadata Canvas provide automatic and error-free synonym creation tools.
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 Data Assist or the Metadata canvas.

**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:

- 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.
- Define parent and child hierarchies for cube data sources.
- Apply security rules for fields and values to ensure that user access is based on Information Builders data source security (DBA) specifications.

**Accessing Data Assist**

You can access Data Assist by:

- Clicking **Data Assist** on the Applications ribbon and selecting **New Data Assist**.
  
  A dialog box opens for selecting an application and a synonym to open.
- Double-clicking a synonym on the Applications tree.
- Right-clicking a synonym on the Applications tree and selecting **Open**.
The synonym opens in Data Assist.

**Understanding the Data Assist User Interface**

The Data Assist user interface consists of a ribbon and up to four types of panes used for viewing and editing a synonym. You can open multiple synonyms in Data Assist. Each will have its own tab on the Data Assist page.

The number of panes you actually see when you open a synonym depends on the environment from which you are accessing Data Assist and the characteristics of the synonym you open.

*Reference:* **Data Assist Ribbon**

The Data Assist Ribbon is divided into sections, as shown in the following image. The sections that display depend on the environment from which you opened the synonym.

### File Section

The File section provides the following options.

**File Menu**

Provides the following file handling options.

**New**

Enables you to create a new Custom Copy, Upload Data, or Synonym.

**Open**

Opens the Application Tree so you can open another synonym in the Data Assist window.

**Switch Files**

Opens a list of files currently open in Data Assist tabs and lets you select one to switch to.

**Save**

Saves the file in the tab that currently has the focus.

**Save all Files**

Saves the files open in all tabs.

**Save As**

Opens the Save As dialog box to save the current file.
Close
Closes the file that currently has the focus. If you have made changes and have not saved the file, a Close dialog box opens asking if you want to save changes.

Exit all without saving
Exits Data Assist without saving any changes.

Close Tool Retaining Context
Closes Data Assist. If you reopen Data Assist, the tabs from the previous session will be intact.

Related Menu
Provides the following options.

Open Base Synonym
This option will only be available if the current tab is for a cluster synonym. It provides a list of the synonyms referenced by the cluster. Select one or more to open them in new tabs.

Custom Copy
Opens a Custom Copy window in a new tab.

Help Section
The Help section provides the following options.

Test Menu
Provides the following options.

Session Log
Opens the Session Log window.

Clear Session Log
Deletes all lines from the Session Log.

View MFD
Opens a text view of the Master File in the Output pane.

View AFD
Opens a text view of the Access File in the Output pane.

Tutorials
Provides two options, Upload Data and Business View Plus (BV+) tutorials. The selected tutorial will open in new window.

Help
Opens help about the wizards (Upload and SQL) and Data Assist.
**Undo/Redo Section**

The Undo/Redo section provides the following options.

**Undo**
Undoes the most recent actions. You can set the number of undo actions supported using the Options menu. The default number of undo actions is 50.

**Redo**
Redoes the most recent actions. You can set the number of redo actions supported using the Options menu. The default number of redo actions is 50.

**Metadata Section**

The Metadata section provides the following options.

**Define**
Opens the Add Detail dialog box with an expression editor for creating a virtual field. For more information, see *Creating a Virtual Field* on page 361.

**Compute**
Opens the Add Summary dialog box with an expression editor for creating a calculated summary value. For more information, see *Creating a Calculated Value* on page 361.

**Variable**
Opens a Properties dialog box to add a new global variable to the Variables list in the synonym. The new variable is added to the Tables/Columns pane. For more information, see *Adding a Global Variable to a Synonym* on page 366.

**Join Editor**
Opens the modeling (pictorial) view of the Master File showing the joins in effect. Enables you to edit the joins and create new cluster synonyms. For more information, see *Creating a Join* on page 367.

**DBA**
Opens the DBA dialog box for adding security rules to the synonym. For more information, see *Adding Data Source Security (DBA)* on page 370.

**Pivot**
Opens a Pivot Columns to Rows dialog box that lets you select columns to display as rows and to define their properties. For more information, see *Pivoting Columns* on page 375.
Sample Data Section

The Sample Data section provides the following options.

Autorun Menu
Provides the following autorun options.

Autorun
Can be Off or On. On creates a tab in the output window with a sample of the current data. Off does not show sample output. On is the default value.

Data Preview
Can be Off or On. On shows sample values in the Table/Columns and Business View panes. Off does not show sample data values in the Tables/Columns and Business View panes. On is the default value.

Sample Data Button
Lets you generate a sample data report of the current synonym in the output pane.

Options Section

The Options section provides the following options.

View Menu
The View menu provides the following options.

Reset View
Returns the Data Assist page to its default view.

Grid Details
Lets you choose whether to show metadata as columns in the Table/Column and Business View panes, or to just show the tree in the panes and show the metadata as tooltips when the mouse hovers over a field.

Table/Column Pane
Lets you choose whether to tile the Table/Column and Business View panes horizontally or vertically and whether to show or hide the Table/Column pane.

Business View Pane
Lets you show or hide the Business View pane.

Filters/Groups Pane
Lets you show or hide the Filters/Groups pane.

Output Pane
Lets you hide the output pane or show it pane floating (as a separate window on top of the Data Assist page), docked (as a pane in the Data Assist page), or maximized (as a full window).
Multiple Output Panes
Lets you select whether to create tabs in the output pane for each change or to shown only the latest output.

Options Menu
Provides the following options.

Advanced
Opens an Options dialog box for setting the following preferences.

Synonym Editor
Includes the following options.

- **Support extended options.** Selections are Yes and No. The default value is No. This will add right-click options sort objects and styles to appropriate fields and folders.

- **Enable Quick Copy from inside Synonym Editor.** Selections are Yes and No. The default value is No.

Column Management
Includes the following options.

- **Name display strategy.** Lets you select the type of metadata to display in the tree. Supported values are Name, Title, Description, Alias. The default value is Title.

- **Function display strategy.** Lets you select whether to display function syntax or a short description when you right-click a field and add a function. The default is a short description.

Language Generation
Includes the following options.

- **Use segment to qualify field reference.** Defines how field references will be generated in requests. Selections are For duplicate fields and Always. The default value is For duplicate fields.

- **Use application name to qualify synonym reference.** Defines how synonym references will be generated in requests. Selections are Yes and No. The default value is No.

Limits
Includes the following options.

- **Maximum number of rows for test.** Enter the maximum number of rows for test queries. The default value is 50.
- **Maximum number of columns for test.** Enter the maximum number of columns for test queries. The default value is 999999.

- **Maximum number of identical error messages.** Enter the maximum number of identical error messages that can be issued. The default value is 10.

- **Random Sampling limit (in %).** Enter the maximum sample size for data profiling, as a percent.

- **Undo/Redo Limit.** Enter the maximum number of undo/redo actions supported. The default value is 50.

- **Omit missing (null) values in Data Profiling charts.** Select Yes to omit missing values in the charts generates for data profiling. The default value is No, which includes missing values.

**Understanding Data Assist Panes**

The Data Assist panes that you see by default depend on the environment from which you are opening a synonym and the characteristics of the synonym. The panes available in Data Assist are:

- **Table/Column pane.** This pane shows the physical structure (segments and fields) of the data source.

- **Business View pane.** This pane shows the logical view (BV+) of the data source.

- **Filters/Groups pane.** This pane shows any filters and groups defined in the synonym or view.

- **Output pane.** This pane shows sample data and reports.

Each pane has a menu bar that offers options specific to that pane as well as options that are common to multiple panes.
The following menu bar options are common to multiple panes.

- **Find** (binocular search) button is common to all Data Assist panes. It opens a text box for entering a search term, a search icon for starting the search, previous and next arrows for advancing through the search, and a menu for selecting the following search options.

  - **Case Sensitive**
    When checked searches for the term in the case in which it is entered.

  - **Contains search term**
    When selected, searches for any text object that contains the search term.

  - **Starts with search term**
    When selected, searches for any text object that starts with the search term.

  - **Ends with search term**
    When selected, searches for any text object that ends with the search term.

  - **Show only matched items**
    When checked, shows only the matched items in the window after the search. This is checked by default.

- The **X** (Hide) button is common to the Table/Column, Filters/Groups, and Output panes. It hides the pane.
In addition, there are common right-click menu options for fields in the Table/Column, Business View, and Output panes. Some of the options that show up are dependent on the data type of the field. For more information, see Right-Click Options for Fields in the Table/Column, Business View, and Output Panes on page 378.

Reference: Table/Column Pane

The Table/Column pane displays the physical characteristics of the underlying data sources represented in the synonym. You can use options on the ribbon, or use the context sensitive right-click menu options to make changes to the physical synonym.
The Table/Column pane is shown in the following image.

<table>
<thead>
<tr>
<th>Display Name (Title)</th>
<th>Data Type</th>
<th>Value 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID Sales</td>
<td>Integer</td>
<td>1</td>
</tr>
<tr>
<td>ID Store</td>
<td>Integer</td>
<td>0</td>
</tr>
<tr>
<td>ID Currency</td>
<td>Integer</td>
<td>1</td>
</tr>
<tr>
<td>ID Customer</td>
<td>Integer</td>
<td>175589</td>
</tr>
<tr>
<td>ID Discount</td>
<td>Integer</td>
<td>100</td>
</tr>
<tr>
<td>ID Product</td>
<td>Integer</td>
<td>7005</td>
</tr>
<tr>
<td>ID Time</td>
<td>Integer</td>
<td>2195</td>
</tr>
<tr>
<td>Cost of Goods,Local Currency</td>
<td>Numeric</td>
<td>$234.00</td>
</tr>
<tr>
<td>Cost of Goods</td>
<td>Numeric</td>
<td>$234.00</td>
</tr>
<tr>
<td>Discount,Local Currency</td>
<td>Numeric</td>
<td>$0.00</td>
</tr>
<tr>
<td>Discount</td>
<td>Numeric</td>
<td>$0.00</td>
</tr>
<tr>
<td>Gross Profit,Local Currency</td>
<td>Numeric</td>
<td>$165.00</td>
</tr>
<tr>
<td>Gross Profit</td>
<td>Numeric</td>
<td>$165.00</td>
</tr>
<tr>
<td>MSRP,Local Currency</td>
<td>Numeric</td>
<td>$399.00</td>
</tr>
<tr>
<td>MSRP</td>
<td>Numeric</td>
<td>399.00</td>
</tr>
<tr>
<td>Quantity,Sold</td>
<td>Integer</td>
<td>1</td>
</tr>
<tr>
<td>Revenue,Local Currency</td>
<td>Numeric</td>
<td>$399.00</td>
</tr>
<tr>
<td>Revenue</td>
<td>Numeric</td>
<td>$399.00</td>
</tr>
<tr>
<td>Sale Unit(s)</td>
<td>Integer</td>
<td>1</td>
</tr>
<tr>
<td>Cost of Goods,Group</td>
<td>Numeric</td>
<td>$234.00</td>
</tr>
</tbody>
</table>

- **Customer Dimension**
- **Product Dimension**
- **Store Sales Dimension**
- **Time Sales Dimension**
- **Shipments Fact**
- **Constant Defines/Computes**
  - Customers: Integer
  - Customer,WKID: Character (fixed) 4326
  - Store,WKID: Character (fixed) 4326
- **Variables**
The menu bar at the top of the pane has the following options.

- The Display menu at the top of the pane gives you the following display options for the synonym tree.
  
  **Columns/Tables**
  Lists the segments and fields in the synonym with their data types and two data values. This is the default display.

  **Tables**
  Displays the segments (tables) and their relationships in the form of a tree.

  **Join Editor**
  Displays the modeling view of the synonym, with the Application Tree in the left pane and a pictorial view of the joined tables on the right. You can edit the joins using this display option. For more information, see *How to Create or Edit a Join* on page 367.

- The View menu gives you the following options.
  
  **Expand All**
  Expands the tree.

  **Collapse All**
  Collapses the tree.

  **Choose Columns ...**
  Opens a dialog box for selecting the metadata attributes and number of field values to display.

  **Reset to Defaults**
  Resets the pane to the default view.

**Reference:**  *Business View Pane*

The Business View pane shows the logical view using folders that has been created in the synonym to create a view (BV+) of the data and lets you add new folders or edit or delete existing folders. You can drag fields from the Table/Column pane, use options on the ribbon, or use the context sensitive right-click menu options to make changes to the folders. For information about BV+, see *Business View Plus (BV+)* on page 350.
The Business View pane is shown in the following image.

<table>
<thead>
<tr>
<th>Display Name (Title)</th>
<th>Data Type</th>
<th>Value 1</th>
<th>Value 2</th>
</tr>
</thead>
<tbody>
<tr>
<td>retail0317/wf_retail_lite</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Filters and Variables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Measure Groups</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Revenue Per Sq. Ft.</td>
<td>Numeric</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>Revenue Local Per Sq. M.</td>
<td>Numeric</td>
<td>.</td>
<td>.</td>
</tr>
<tr>
<td>Cost of Goods, Local Currency</td>
<td>Numeric</td>
<td>$234.00</td>
<td>$46.00</td>
</tr>
<tr>
<td>Cost of Goods</td>
<td>Numeric</td>
<td>$234.00</td>
<td>$46.00</td>
</tr>
<tr>
<td>Discount, Local Currency</td>
<td>Numeric</td>
<td>$.00</td>
<td>$20.00</td>
</tr>
<tr>
<td>Discount</td>
<td>Numeric</td>
<td>$.00</td>
<td>$20.00</td>
</tr>
<tr>
<td>Gross Profit, Local Currency</td>
<td>Numeric</td>
<td>$165.00</td>
<td>$13.99</td>
</tr>
<tr>
<td>Gross Profit</td>
<td>Numeric</td>
<td>$165.00</td>
<td>$13.99</td>
</tr>
<tr>
<td>MSRP, Local Currency</td>
<td>Numeric</td>
<td>$399.00</td>
<td>$79.99</td>
</tr>
<tr>
<td>MSRP</td>
<td>Numeric</td>
<td>$399.00</td>
<td>79.99</td>
</tr>
<tr>
<td>Quantity, Sold</td>
<td>Integer</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Revenue, Local Currency</td>
<td>Numeric</td>
<td>$399.00</td>
<td>$59.99</td>
</tr>
<tr>
<td>Revenue</td>
<td>Numeric</td>
<td>$399.00</td>
<td>$59.99</td>
</tr>
<tr>
<td>Sale Unit(s)</td>
<td>Integer</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Shipment(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Dimensions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sales Related</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transaction Date, Simple</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sale, Year</td>
<td>Integer</td>
<td>2012</td>
<td>2012</td>
</tr>
<tr>
<td>Sale, Quarter</td>
<td>Integer</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Sale, Month</td>
<td>Integer</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Sale, Day</td>
<td>Integer</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Transaction Date, Components</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Purchase</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Product</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Shipment Related</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Store</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Customer</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The menu bar at the top of the pane provides the following options. Note that certain options only appear when the view supports them.

- The Reset Default button resets the pane to the default view.
- The Flatten button removes child folders.
The Display menu provides the following options for displaying the folder tree.

**Columns/Folders**
- Lists the folders and fields in the view with their data types and two data values. This is the default display.

**Folders**
- Displays the folders and their relationships in the form of a tree.

**Modeling View of Folders**
- Displays the modeling view of the BV+, a pictorial view of the filters, join, and variables.

The View menu provides the following options.

**Expand All**
- Expands all folders.

**Collapse All**
- Collapses all folders.

**Choose Columns ...**
- Opens a dialog box for selecting the fields.

**Reset to Defaults**
- Resets the pane to the default view.

The X (Hide All) button removes the folders from the display.

The BV menu provides the following options.

**BV NAMESPACE=OFF**
- Enables BV Namespace Off mode. New folders cannot be added to the view, you are limited to adding new DV structures in the synonym.

**BV NAMESPACE=ON**
- Enables BV Namespace On mode. You can create a BV+ view of the synonym, adding new folders to the view and assign DV roles.

For information about BV+, see *Business View Plus (BV+)* on page 350.

**Reference:** Filters/Groups Pane

The Filters/Groups pane shows filters and groups defined in the synonym.

Each filter or group added is displayed in its own card (vertically tiled pane) within the Filters/GROUPS pane.
The Filters/Groups pane is shown in the following image.
The menu bar at the top of the pane has the following options.

**Common Menu Bar Options**

Every card in the Filters/Groups pane has the following options.

**Move Up**
Moves the card up in the pane. This option is only available if the card is not the top card in the pane.

**Move Down**
Moves the card down in the pane. This option is only available if the card is not the bottom card in the pane.

Each group card has an expand button on the menu bar, which expands the Filters/Groups pane. Once the pane is expanded, a Restore button appears for collapsing the pane.

**Filter Menu**

The down arrow (menu) for a filter provides the following options.

**Display Menu**
Provides the following options for displaying and selecting the filter values.

**Dropdown List**
Generates a dropdown list for filter values. When expanded, a check list of values.

**Check List**
Lists the field values with a check box next to each, and a scroll bar, if needed to scroll through the values. This is the default display option for filters on alphanumeric and integer fields.

**Slider**
Available for filters on non-integer numeric fields only. Displays a bar with two sliders for selecting From and To values. When you move the sliders, a Reset button displays that resets the range to the entire range of values. This is the default display option for filters on non-integer numeric fields.

**Text Box**
Opens a text box in which you can enter a value.

**Double List**
Shows two lists, one with available values and one with selected values. To add values to the Selected Values list, you can right-click a value or multi-selected values (if Multiple Values is enabled) and choose Select. You can also double-click a value or drag values. To remove values from the Selected Values list, you can right-click a value or multi-selected values and choose Unselect. You can also double-click a value or drag values.
Once you have added a value to the Selected Values list, an *Unselect all* button appears to make it easy to remove all selections.

**Multiple Values**
Enables multiple selections. This is the default selection option.

**Single Value**
Disables multiple selections.

**Relation Menu**
Provides the following operators for the filter.

**EQ**
Selects fields with values equal to a filter value. This is the default operator for alphanumeric and integer fields.

**NE**
Selects fields with values not equal to any filter value.

**LT**
Selects fields with values less than the filter value.

**GT**
Selects fields with values greater than the filter value.

**LE**
Selects fields with values less than or equal to the filter value.

**GE**
Selects fields with values greater than or equal to the filter value.

**LIKE**
Selects fields whose values match a pattern. This operator is available for alphanumeric fields.

**RANGE**
Selects fields whose values fall within a range. This operator is available for numeric fields. This is the default operator for non-integer numeric fields.

**Variables Menu**
Supported for filters on alphanumeric fields. It lists all defined variables for selection and includes the default option to prompt for actual data.

**Values Menu**
Supported for filters on alphanumeric fields. Provides the following options.

**Show Null**
Shows null values on the list of selection values.
Hide Nulls
Does not show null values on the list of selection values. This is the default option.

Advanced Menu
Provides the following options.

No delay, immediate update
Updates the filter as soon as you select a value. This is the default update option.

Use Apply button
Does not update the filter until you click the Apply Filter button, which displays on the menu bar when you select this option.

Show selected values on top
Moves selected values to the top of the list. This is the default option.

Keep selected values in place
Does not move selected values to the top of the list.

Hide Filter Card
Removes the filter from the pane, but leaves it in the synonym. To reopen the filter in the Filters/Groups pane, right-click the filter in the synonym and select Edit.

Delete Filter
Deletes the filter from the synonym and the Filters/Groups pane.

Properties
Opens a dialog box showing filter properties in which you can change the title for the filter that appears on output.

Group Menu
The down arrow (menu) for a group provides the following options.

Display Menu
Provides the following options for displaying groups.

Double List
Shows two lists, one with input values and one with selected values. To add values to the Selected Values list, you can right-click a value or multi-selected values and choose Select. You can also double-click a value or drag values. To remove values from the Selected Values list, you can right-click a value or multi-selected values and choose Unselect. You can also double-click a value or drag values. If you right-click in the Input Values list and select Make a new group, the new group will be added in the Selected Values list. The added groups are named based on the values selected and contain the values selected.
Single List
Shows a list of values, initially in one default group. Right-click menu options let you create a new group, copy and paste values, ungroup values, and edit the group name, and recreate groups based on like-sounding values.

Add All
Adds all shown ungrouped values to a new group.

Create a New Group
Creates a new group with no values in it.

Ungroup All
Removes all groups except the default group.

Edit properties
Opens the Edit properties dialog box. You can change the overall group name, title, and default value.

Hide Group Card
Removes the group from the pane, but leaves it in the synonym. To reopen the group in the Filters/Groups pane, right-click the group in the synonym and select Edit Grouping.

Reference: Output Pane
The Output pane shows the results of changes to a synonym or view, sample data output, and output of sample data, impact analysis, and data profiling reports and charts.
Each new output can be added on a new tab in the Output pane or replace the existing tab, depending on your preferences. The following image shows the output pane with two tabs. If there are too many tabs to display in the window, left/right arrows (< >) display for scrolling.

The menu bar at the top of the pane provides the following options.

**Double the row limit**
- Doubles the number of rows used for sample and changed data display.

**View as Columns**
- Displays the output with grid lines separating rows and columns.

**View as Tooltip**
- Displays the output without grid lines.

**View Printable Format**
- Opens the output in a browser.

**Choose Columns ...**
- For certain types of reports, opens a check list for selecting the columns to display.

**Reset to Defaults**
- Resets the output to its default view.
Each tab has a right-click menu with the following options:

- **Close other tabs.** Closes all tabs but this one.

- **Close tabs to the right.** Closes all tabs to the right. If this tab is the rightmost tab, this option is grayed out.

- **Show only the latest.** Closes all tabs but the most recent tab.

On each tab, each column title has a menu (opened using the down arrow) that has the same options as the right-click menu for the field in the Table/Column and Business View panes. For information, see *Right-Click Options for Fields in the Table/Column, Business View, and Output Panes* on page 378.

In addition, the following options are specific to the Output pane.

- **Sort Ascending.** Sorts the values in low to high order.

- **Sort Descending.** Sorts the values in high to low order.

- **Reset to Original Order.** Resets the order to the original when the tab first opened.
Enhancing a Synonym

You can enhance a synonym by:

- Adding a logical view using the Business View pane. For information, see Business View Plus (BV+) on page 350.
- Adding filters. For information, see Right-Click Options for Fields in the Table/Column, Business View, and Output Panes on page 378.
- Creating a virtual field. For information, see Creating a Virtual Field on page 361.
- Creating a calculated summary value. For information, see Creating a Calculated Value on page 361.
- Adding a global variable. For information, see Adding a Global Variable to a Synonym on page 366.
- Creating a join. For information, see Creating a Join on page 367.
- Adding security restrictions. For information, see Adding Data Source Security (DBA) on page 370.
- Pivoting columns. For information, see Pivoting Columns on page 375.

Note: When you enhance a synonym, in most cases you can use the Business View pane to create the enhancement. However, since this pane gives you a logical view of the synonym, it does not give you full access to the features that are added. To have full view of and access to synonym components, you must open the Table/Column pane, if it is not already open. To open the Table/Column pane, click Table/Column Pane on the View menu in the Options group on the ribbon. This pane represents the physical view of the synonym and provides full access to all of its components.

Business View Plus (BV+)

Business View Plus (BV+) combines the power and capabilities of Business View (BV) and Dimension View (DV) into one feature that allows a customized view of the data source and enables the use of joins, measures, hierarchies, attributes, expressions, and filters. This allows for robust report, chart, document, and visualization development using a customized logical view of a data source.

A traditional Business View offered users a customized logical view of a data source by grouping related items into folders that reflect business logic for an application, rather than the physical position of items in the data source. However, the fields in these folders did not have any indication of their roles in a request.
A traditional Dimension View, on the other hand, categorized fields on the basis of their roles in a request. Measures were placed in measure groups, hierarchies were organized within dimensions, levels were organized within hierarchies, and attributes were organized within levels. Then, when a field was double-clicked in InfoAssist+ or dragged onto the report or chart canvas in App Studio, it was added as a sort field or aggregation field depending on its placement in the Dimension View structure. Dimension Views, however, offered no ability to create a custom logical view of the data source.

BV+ combines Business Views and Dimension Views by enabling you to group fields into folders and, for each field, assign a role that indicates its role in a request. The syntax is clear and simple, and it provides all of the functions of both traditional Business Views and Dimension Views. In addition, BV+ gives you total flexibility in creating folders anywhere in the structure, and in reusing fields in multiple folders.

For example, if you assign the role DIMENSION to a field, it will automatically be added to the By field container for reports and the horizontal axis for charts if you double-click or drag the field onto the report or chart canvas. If you assign the role Drill Level to successive fields in a folder and turn AUTODRILL on, automatic drilldowns will be generated from the top level to the bottom level on the generated output.

You can create or edit a synonym to use BV+ in the Reporting Server Web Console, the Data Management Console, or the App Studio Metadata Canvas.

**Introduction to BV Namespace Modes**

When you upload a file or create or open a synonym in the Reporting Server Web Console or Data Management Console, the synonym opens in one of two modes for creating a BV+ structure, BV_NAMESPACE=OFF mode or BV_NAMESPACE=ON mode. The mode in which the synonym opens determines the types of BV+ structures you can add to your synonym. It also controls the type of field name qualifiers that will be used, after the synonym is saved, when you create a request using the WebFOCUS tools.

You can set your Web Console preferences to open Data Assist, the wizards, the DMC, and the App Studio Metadata Canvas in your preferred BV Namespace mode by going to the Workspace tab, clicking FOCUS Sets and Info, clicking Settings for Web Console Preferences, and setting the parameter AUTO_BV_NAMESPACE to OFF (the default if you install a new server) or ON. If the synonym already contains a DV or BV structure, the presence of this existing structure will override your setting with BV_NAMESPACE=OFF or BV_NAMESPACE=ON, respectively.

If you create a new synonym, or open an existing synonym that has no DV or BV, it will respect the setting you set in the Web Console. When you upload a file, the synonym has no existing DV or BV structure, so it respects the mode you set in the Web Console.
Reference: **BV_NAMESPACE=OFF Mode**

BV_NAMESPACE=OFF mode uses physical segment names to qualify field references in reports. If you open an existing synonym that has a DV, it will open in this mode, regardless of the setting you configured. In this mode, you can only add nodes that conform to the DV structure. That is, you can add new measure groups and dimensions under the existing measure group and dimension structure.

The following describes the structures and actions available in new or existing synonyms in BV_NAMESPACE=OFF mode:

- **Creating a new cluster synonym or opening an existing synonym that has no BV or DV.** If the synonym has no logical view defined, it opens with three default nodes in the Business View pane, Filters and Variables, Measure Groups, and Dimensions, as shown in the following image.

![Data Assist Image](image)

These nodes are based on a DV structure, and any edits you make to the synonym in this pane using BV_NAMESPACE=OFF mode must adhere to this structure. The right-click menu options provide only the structures available for a DV. You can insert a new measure group under the Measure Group node or a new dimension folder under the Dimensions node, but you cannot create a new node in the synonym. In a measure group folder, you can only place measures. In a dimensions folder, you can only place dimensions. Under a dimension, you can only add hierarchies, and under a hierarchy field, you can only add attributes.
Opening an existing synonym with a DV defined. It opens showing the DV organization and icons in the Business View pane. The synonym syntax is converted to use BV+ folders with the DV structure. You cannot create new folders, you are limited to the structure already defined in the Business View pane. The right-click menu options provide only the structures available for a DV, as shown in the following image that shows the right-click options for the Measure Group folder.

Reference:  BVNAMESPACE=ON Mode

BVNAMESPACE=ON mode uses logical folder names to qualify field references in reports. If you open an existing synonym that has a BV, it will open in this mode, regardless of the setting you configured. In this mode, you can create your own logical view of the synonym. You are free to add new folders and assign DV roles to fields and folders.

The exception to this is the Upload Wizard. When a file is selected in the wizard, the business view default structure that is automatically populated is based on the three DV nodes. For BVNAMESPACE=ON, you will be able to insert new folders anywhere in the structure. You are not limited to the three default node.
The following describes the structures and actions available in new or existing synonyms in BV_NAMESPACE=ON mode:

- **Creating a new cluster synonym or opening an existing synonym with no DV or BV.** No nodes are pre-configured, as shown in the following image.

The right-click menu options provide all BV+ options.
Opening an existing synonym with a BV defined. It opens in BV_NAMESPACE=ON mode. It will open showing the Business View structure defined within it. The right-click menu options provide BV+ options, as shown in the following image.

Reference: Usage Notes for BV_NAMESPACE Modes

- When you enhance a synonym by adding a new item to the synonym, such as a virtual field or calculated value, you can hide it in the Business View pane, but that does not delete the object from the synonym. To physically delete an object from a synonym, you must do it from the Table/Column pane, which contains the physical representation of the synonym.

- In BV_NAMESPACE=ON or OFF mode, the folder structure must include all of the fields referenced in the request, as fields not included in folders will not be accessible.

- In BV_NAMESPACE=ON mode, moving a field from one folder to another may also make the field inaccessible, as the request will not have the correct folder qualifier for the field.

- Synonyms in BV_NAMESPACE=OFF mode have the attribute BV_NAMESPACE=OFF on the file declaration.

- You can change BV Namespace modes in the Reporting Server Web Console by clicking the BV menu at the top of the Business View pane and selecting BV_NAMESPACE=ON or BV_NAMESPACE=OFF.
If you generate a request using the WebFOCUS tools in one BV_NAMESPACE mode, it may not run if the synonym is converted to the other BV_NAMESPACE mode, as the field qualifiers will be incorrect for the new mode.

If you change the BV_NAMESPACE mode, a popup window opens to warn you of the potential effects on existing requests.

When you begin the cycle of developing reports and metadata in parallel, use BV_NAMESPACE=OFF mode to make sure that procedures developed earlier in the cycle will continue to run as changes are made to the metadata.

Any changes to metadata should be thoroughly tested before use in production environments.

### Assigning DV Roles

In BV+, you define folders, which function as segments to provide a view of the synonym and to define the accessible fields and their relationships. Folder relationships are the same as segment relationships, with parent folders, child folders, and sibling folders.

While you have total flexibility defining a structure using any fields from your data source, when you issue a report request against the synonym, the retrieval path for the data must conform to any constraints imposed by your DBMS entity diagrams and by the rules of WebFOCUS retrieval.

Only the folders will be displayed in the WebFOCUS tools, not the real segments, and only the fields within the folder structure will be accessible for reporting.
You can assign a DV role to a folder or field by right-clicking the folder or field and selecting a DV role. The following image shows the right-click options for a folder.

![Right-click options for a folder](image)

You can explicitly assign a DV role to a folder or field, or have it automatically inherit its role from its parent. If you explicitly assign a DV role, that role moves with the object if you drag it to another location within the BV+ structure. If you do not explicitly assign a DV role, the role changes as you move the object under a new parent, except if you drop it onto a field with the Drill Level role. If dropped onto a Drill Level field, the moved field inherits the Drill Level role.

The following DV roles can be assigned.

- **Dimension.** A dimension field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, will automatically be added to the request as a vertical (BY) sort field.

  A folder can be assigned the role Dimension.
A field can be assigned the role Dimension (Standalone) or Dimension (Drill Level). When it is assigned the role Dimension (Drill Level), it will become part of a hierarchy where the levels depend on the order of the fields in the folder. Then, when AUTODRILL is turned on, automatic drill-downs will be created on the report or chart output. The following image shows the choices for DV role when you right-click a dimension field.

For a folder assigned the DV role Dimension or a field assigned the DV role Dimension (Standalone), the following attribute is added to the folder or field declaration in the synonym.

**DV_ROLE=DIMENSION**

For a field assigned the DV role Dimension (Drill Level), the following attribute is added to the field declaration in the synonym.

**DV_ROLE=LEVEL**

A folder can contain only one drill level hierarchy. However, you can use the same fields in multiple hierarchies by placing each hierarchy in a separate folder. A folder with a drill level hierarchy is not limited to just the hierarchy. It can contain other fields with different DV_ROLEs.
- **Measure.** A measure field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, will automatically be added to the request as an aggregated value (SUM), if it is numeric. If it is alphanumerical, it will be added as a vertical (BY) sort field. A folder or field can be assigned the role Measure.

For a folder or field assigned the DV role Measure, the following attribute is added to the folder or field declaration in the synonym.

```
DV_ROLE=MEASURE
```

- **Attribute.** An attribute field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, will automatically be added to the request as an aggregated value (SUM), if it is numeric, or as a vertical sort field (BY), if it is alphanumerical.

For a folder or field assigned the DV role Attribute, the following attribute is added to the folder or field declaration in the synonym.

```
DV_ROLE=ATTRIBUTE
```

- **Folder.** A folder is a virtual segment in a BV+. It can be assigned the roles Dimension, Measure, or Attribute.

**Note:** When a folder is inserted as a child of a field, the attribute PARENT_FIELD describes this relationship. By default, such a folder and its fields will be assumed to have the Attribute role.

- **None.** If no role is assigned, the field or folder will inherit its role from its parent. If a role has been assigned, you can remove it by selecting the option to inherit its role from its parent, as shown in the following image.
Example: Sample BV+ Declarations

The following declarations show sample BV+ folder and field definitions. Note that the declaration for each field in a BV+ folder specifies the real segment it actually belongs to.

Sample Dimension Folder Declaration

The DV_ROLE for the PRODUCT_CATEGORY folder is DIMENSION.

```
FOLDER=PRODUCT_CATEGORY, PARENT=FOLDER1,
    DV_ROLE=DIMENSION,
    DESCRIPTION='Product and Vendor', $
```

Sample Attributes Folder Declared as a Child of a Field

The ATTRIBUTES1 folder has the DV_ROLE ATTRIBUTE. Its parent folder is PRODUCT_CATEGORY, and its parent field is MODEL.

```
FOLDER=ATTRIBUTES1, PARENT=PRODUCT_CATEGORY, PARENT_FIELD=MODEL,
    DV_ROLE=ATTRIBUTE,
    DESCRIPTION='Model Details', $
```

Sample BV+ Level Hierarchy and Standalone Dimension

The PRODUCT_CATEGORY folder has a hierarchy defined consisting of the PRODUCT_CATEGORY, PRODUCT_SUBCATEG, BRAND, and MODEL fields. The field VENDOR_NAME is a standalone dimension field.

```
FOLDER=PRODUCT_CATEGORY, PARENT=FOLDER1,
    DV_ROLE=DIMENSION,
    DESCRIPTION='Product and Vendor', $
    FIELDNAME=PRODUCT_CATEGORY, ALIAS=PRODUCT_CATEGORY,
        BELONGS_TO_SEGMENT=WF_RETAIL_PRODUCT,
        DESCRIPTION='Product Category',
        DV_ROLE=LEVEL, $
    FIELDNAME=PRODUCT_SUBCATEG, ALIAS=PRODUCT_SUBCATEG,
        BELONGS_TO_SEGMENT=WF_RETAIL_PRODUCT,
        DESCRIPTION='Product Subcategory',
        DV_ROLE=LEVEL, $
    FIELDNAME=BRAND, ALIAS=BRAND,
        BELONGS_TO_SEGMENT=WF_RETAIL_PRODUCT,
        DESCRIPTION='Product Brand',
        DV_ROLE=LEVEL, $
    FIELDNAME=MODEL, ALIAS=MODEL,
        BELONGS_TO_SEGMENT=WF_RETAIL_PRODUCT,
        DESCRIPTION='Product Model',
        DV_ROLE=LEVEL, $
    FIELDNAME=VENDOR_NAME, ALIAS=VENDOR_NAME,
        BELONGS_TO_SEGMENT=WF_RETAIL_VENDOR,
        DESCRIPTION='Vendor Name',
        DV_ROLE=DIMENSION, $
```
Sample Measure Field
The PRODUCT_COST field has been assigned the DV_ROLE MEASURE.

`FIELDNAME=PRODUCT_COST, ALIAS=PRODUCT_COST, BELONGS_TO_SEGMENT= WF_RETAIL_PRODUCT, DESCRIPTION='Product Cost', DV_ROLE=MEASURE, $`

Creating a Virtual Field
A virtual field can be used in a request as though it is a real data source field. The calculation that determines the value of a virtual field is performed on each retrieved record that passes any screening conditions on real fields. The result of the expression is treated as though it were a real field stored in the data source. A virtual field defined in a synonym is available whenever the data source is used for reporting.

Procedure: How to Create a Virtual Field
1. Click Define on the Data Assist ribbon, or right-click the filename node in the Table/Column pane, point to Insert, and select Advanced Define.

The Add Detail expression calculator opens, as shown in the following image.

![Add Detail Expression Calculator](image)

2. Create the expression.

For more information about creating an expression see Using the Expression Calculator on page 362.

3. Click OK.

Creating a Calculated Value
A calculated value is a temporary field that is evaluated after all the data that meets the selection criteria is retrieved, sorted, and summed.
Procedure: How to Create a Calculated Field

1. Click Compute on the Data Assist ribbon.

   The Add Summary expression calculator opens, as shown in the following image.

2. Create the expression.

   For more information about creating an expression see Using the Expression Calculator on page 362.

3. Click OK.

Using the Expression Calculator

When you generate a virtual field or calculated value, the Expression Calculator opens with buttons that contain all of the elements needed for generating any type of WebFOCUS expression.

Procedure: How to Use the Expression Calculator

The expression calculator is used for defining virtual fields (DEFINE) and creating calculated summary values (COMPUTE).

1. Click Define or Compute on the Data Assist ribbon.

   The expression calculator opens, as shown in the following image.
Note that if you clicked Define, the title in the expression calculator window says Add Detail (Define). If you clicked Compute, it says Add Summary (Compute).

2. Enter a name for the virtual field or calculated value, or accept the default.

3. Add a title or leave the field blank. The title will be used as the column heading on reports, if you enter one. If you do not, the field name will be used.

4. Enter a format for the field or accept the default.
   The default format is A20. You must make sure the format supports the expression you will be creating.

5. Select the type of elements to show. Choose a view that will help you the most in creating the expression.
   Select one of the following.

   - **Metadata.** This view shows the fields in the synonym in their logical folders. This is the default view if a Business View already exists.
   - **Metadata (Segment View).** This view shows the fields in their physical segments.
   - **Variables/Functions.** This view shows the system variables and functions available.
   - **User Functions.** This view shows your application tree so that you can access any user functions you have created.

   **Note:** To be recognized as a procedure that contains user functions, any .fex file that contains user functions (DEFINE FUNCTIONs) must have the following syntax at the beginning.

   ```
   -*DM_JOB_TYPE=512
   ```

6. Choose a view for the metadata pane.
   The default view is to show the columns. You can expand or collapse the tree and select the columns to show. You can also reset the view to its default.
   In addition, you can search for a metadata element using the binocular search function. Clicking the binoculars opens a text box for entering a search term and navigation buttons for searching backward and forward.

7. Create the expression.
In the Expression pane, you can enter an expression in the text box or double-click fields from the metadata pane and use the calculator buttons to create the expression. For more information about expressions and operators, see the *Creating Reports With WebFOCUS Language* manual. The buttons are:

- **Relational Operators.**
  - **LT.** Less than. Is true if the expression on the left evaluates to be less than the expression on the right.
  - **EQ.** Equal to. Is true if the expression on the left evaluates to be equal to the expression on the right.
  - **GT.** Greater than. Is true if the expression on the left evaluates to be greater than the expression on the right.
  - **LE.** Less than or equal to. Is true if the expression on the left evaluates to be less than or equal to the expression on the right.
  - **NE.** Not equal to. Is true if the expression on the left evaluates to be not equal to the expression on the right.
  - **GE.** Greater than or equal to. Is true if the expression on the left evaluates to be greater than or equal to the expression on the right.

- **Conditional Operators.**
  - **IF.** Specifies the condition to be tested.
  - **THEN.** Specifies the result if the condition is true.
  - **ELSE.** Specifies the result if the condition is false.

- **Logical Operators.**
  - **AND.** Is true if both expressions are true.
  - **OR.** Is true if at least one of the expressions is true.
  - **NOT.** Is true if the expression is false.

- **Alphanumeric Operators.**
  - **|.** Weak concatenation.
  - **||.** Strong concatenation (remove trailing blanks).
Enclose in single quotation marks.

- **Arithmetic Operators.**
  - ****. Raise to a power.
  - `. `. Plus. Add the numbers on either side of the `+` sign.
  - `. `. Minus. Subtract the number on the right of the minus sign from the number on the left.
  - `*`. Multiplication. Multiply the number on the left by the number on the right.
  - `/`. Division. Divide the number on the left by the number on the right.

- **Date Operators.**
  - **Date.** Opens a dialog box with the current date entered and lets you select a date using a calendar control.
  - **Datetime.** Opens a dialog box with the current date and time entered and lets you select a date using a calendar control and a time using drop-down lists.

- **Case Operators.**
  - `a > A`. Changes the case to uppercase.
  - `A > a`. Changes the case to lowercase.

- **Other Buttons.**
  - **Validate.** Checks if the expression entered is valid.
  - **Function Assist.** Helps you apply a function to an expression. First you must change the view in the metadata pane to show the list of functions and select a function. Clicking **Function Assist** will open a dialog box that describes what the function does and lets you select a field from the metadata. You can click the **Example** button to see an example of the function syntax. Click **OK** to add the function to the expression or **Cancel** to cancel.

You can clear the current expression by clicking the **Clear (X)** button.

8. Click **OK** to create the Define or Compute, or **Cancel** to cancel.

The virtual field or calculated summary field is added to the list of fields in the Metadata pane.
Adding a Global Variable to a Synonym

You can define global variables in a Master File and use them to parameterize certain attributes in the Master File and its corresponding Access File. You can also add certain system variables to a synonym.

**Procedure:** How to Insert a Global Variable

1. Click *Variable* on the Data Assist ribbon.

   The Properties window opens, as shown in the following image.

   ![Properties window](image)

2. Enter a name for the variable or accept the default.

3. Enter a prompt caption, if needed, for describing what type of value to enter when prompted for the value.

4. Enter a default value, if there is one.

5. Select the type of value container to show, when a request is run.

   You can select from the following General options:

   - **Input box.** The user must enter a value.

   - **Static list of values.** The user must select from a predefined list of values. If you select this option, additional input fields appear in which you list the static values and select whether the user can select a single value or multiple values.

     Enter a list of values enclosed in single quotation marks and separated by the logical operator OR.

   - **Static list of values/captions.** The user must select from a predefined list of values. If you select this option, additional input fields appear in which you list the static values and the captions that should display instead of the actual values, and select whether the user can select a single value or multiple values.
Enter a list of pairs, each pair containing the actual value and the caption to appear separated by commas. The list must be enclosed in parentheses. Each entry must be enclosed in single quotation marks and each pair must separated by commas.

- **Synonym based dynamic list of values.** The user must select from a list of values that is generated dynamically by looking up field values in a lookup synonym. If you select this option, additional fields appear for entering or selecting the lookup synonym, the lookup field, the display field for the caption to appear, and whether the user can select only a single value or multiple values.

- **Procedure based dynamic list of values.** The user must select from a list of values that is generated dynamically by running a procedure that retrieves the lookup field values and display field values. If you select this option, additional fields appear for entering or selecting the lookup procedure, any parameters required for running the procedure, the lookup field, the display field for the caption to appear, and whether the user can select only a single value or multiple values.

You can also enter or select the following Advanced properties for the variable.

- Whether to add single quotation marks around strings.
- The data type.
- The length of the variable value.

6. Click *Apply* to save these properties or *Cancel* to cancel.

### Creating a Join

A join describes a relationship between multiple synonyms based on a condition. The condition may be equality between fields in the synonyms or the result of an expression that relates fields in the synonyms. For more information about joins in a synonym, see the *Describing Data With WebFOCUS Language* manual.

**Procedure:** How to Create or Edit a Join

1. To create a new cluster synonym, from the Application tree right-click an application, point to *New*, and click *Synonym via Data Assist*, or, to edit an existing join open an existing synonym in Data Assist.

2. Click the *Join Editor* button on the Data Assist ribbon.
The Join Editor opens, as shown in the following image for an existing synonym.

If you are creating a new cluster synonym, the right pane will be empty and you can double-click or drag synonyms into it.

3. To insert a new root synonym, click **Insert Root** on the Join Editor menu bar.

The Insert Root window opens, as shown in the following image.

![Insert Root window](image1)

Select a synonym to insert as a root.

You can also drag a synonym from the tree, and set up the join manually.

4. To insert a new child synonym, click **Insert Child** on the Join Editor menu bar.
The Insert Child window opens, as shown in the following image.

Select a synonym to insert as a child.

You can also drag a synonym from the tree, and set up the join manually.

Use the Filtering menu to help with selection.

5. Click OK when you are finished.

6. You can edit the join properties by right-clicking a join connector.

Select from the following options.

- **Join Multiple.** Makes the join a one-to-many join.
- **Join Unique.** Makes the join a one-to-one join.
- **Inner Join.** Selects only those records that have values that satisfy the join condition in both synonyms.
- **Left Outer Join.** Selects all records from the host synonym. Where there is no record that satisfies the join condition in the cross-reference file, default values are substituted.
- **Delete Link.** Deletes the join.
Edit Parent Link. Opens a window for selecting new join fields and changing the join type and condition as shown in the following image.

To test your changes, click Test.

When you are finished, click OK or Cancel to cancel.

7. Close the Join Editor using the x button when you are finished.

You can also make the following edits:

- Click Delete All to delete all joins.
- Click Undo to undo your last action.
- Click Redo to redo your last action.
- Click View to change the view.

You can collapse all of the synonyms so that the fields do not show. You can expand all of the synonyms, you can expand the synonym boxes to full size, set them to standard size (to show four fields at a time), or customize which dimensions are set to standard or full size. You can select Auto Arrange to automatically arrange the synonyms.

Click Options to set join defaults. The options are:

- Insert child segment with snowflakes. The default is No, to insert only the segment selected.
- Default Join Type. The default is Multiple, to create one-to-many joins.
- Display full component names. The default is Yes.

Click OK to save your defaults.

Adding Data Source Security (DBA)

The DBA facility lets you define restrictions and access rights for users.
**Procedure:** How to Add DBA Security

1. Click **DBA** on the Data Assist ribbon.

   The DBA window opens, as shown in the following image.

   ![DBA Window](image)

2. Click **Initialize DBA**.

   A DBA section is added to the synonym, as shown in the following image.

   ![DBA Statements](image)

   The **Initialize DBA** selection is replaced by a **Remove DBA** selection.

   - The top node, named DBA1 by default, is the password for the Database Administrator (DBA). The DBA has complete access, so no access rights need to be defined.

   - The next node, named USER0001 by default, represents a user password. By default, the user is given read access to the data source.

   You can rename the passwords and add and change access rights using right-click options. You can undo actions using the **Undo** link on the menu bar.

3. To change a password, right-click a user and select **Rename**.

   A **Rename** dialog box opens.

   Enter the new password and click **OK**.

4. To add a user, right-click the DBA password, point to **Insert**, and select **User**.

   A new user node is added to the DBA Statements pane.
5. To add an access right to a user password, right-click a user password, point to Insert, and select one of the following:

- **Read Access.** This allows the user to only read the data source.

- **Write Access.** This allows the user to only write new segment instances to the data source.

- **Read/Write Access.** This allows the user to both read from and write to the data source.

- **Update Access.** This allows the user to only update records in the data source.

The access right is added under the user password. You can then restrict those rights to specific segments, fields, or field values.

6. You can further restrict the access rights of a user based on segment names, field names, and field values.
   
a. **Field Restriction.** To prevent access rights to a field, do the following.

   1. Right-click an access right under the user you want to restrict, point to Insert, and select **Field Restriction** as shown in the following image.

   ![Field Restriction Image](image)

   A field restriction placeholder is added under the access right.

   2. Drag a field to the placeholder.
The placeholder is replaced by the field, as shown in the following image.

3. To restrict access to additional fields, repeat these steps for each additional field.
   
b. **Value Restriction.** To prevent access rights to specific field values, create a filter.
   
1. Right-click an access right under the user you want to restrict, point to **Insert**, and select **Value Restriction**.

   A value restriction placeholder is added under the access right.

2. Drag a field to the placeholder.

   The placeholder is replaced by the field, with a default expression. A Restrictions dialog box opens for you to create the expression that will identify the restricted values, as shown in the following image.

   For a non-integer numeric field, a text box opens in which you can enter values. Using the menu on the top right of the Restrictions pane, you can change the display to a slider or a check list. For alphanumeric or integer fields, the default display is the check list. You can multi-select values for the EQ and NE relations. If your display option is a text box, you can click the Add Value (+) button on the menu bar to add another text box. To delete a value, click the Delete Value (-) button on the left of the text box that contains the value you want to delete.
By default, the EQ (equal to) relation is used, so the restriction is in effect for field values equal to the values you enter or select. To change the relation, point to Relation on the menu and select one of the following relational operators.

- **EQ.** Equal to. The restriction is in effect for field values equal to any of the values specified in the restriction expression.

- **NE.** Not equal to. The restriction is in effect for field values not equal to any of the values specified in the restriction expression.

- **LT.** Less than. The restriction is in effect for field values less than the value specified in the restriction expression.

- **GT.** Less than. The restriction is in effect for field values greater than the value specified in the restriction expression.

- **LE.** Less than or equal to. The restriction is in effect for field values less than or equal to the value specified in the restriction expression.

- **GE.** Less than. The restriction is in effect for field values greater than or equal to the value specified in the restriction expression.

- **Range.** From-to. The restriction is in effect for field values greater than or equal to the first value in the range and less than or equal to the second value in the range.

Once you have created an expression, Advanced options become available on the menu. You can update the expression immediately (the default) or use an Apply button. For check lists you can move selected values to the top (the default) or leave them where they are.

c. **Segment Restriction.** To prevent access to one or more segments, do the following:

1. Right-click an access right under the user you want to restrict, point to Insert, and select Segment Restriction.

   A segment restriction placeholder is added under the access right.

2. Drag a segment to the placeholder.
The placeholder is replaced by the segment, as shown in the following image.

3. To restrict access to additional segments, repeat these steps for each additional segment.

d. **Noprint Restriction.** To let the user access a field or segment for retrieval but not display its value on output, do the following.

1. Right-click an access right under the user you want to restrict, point to Insert, and select Noprint Restriction.

   A Noprint restriction placeholder is added under the access right.

2. Drag a field to the placeholder.

   The placeholder is replaced by the field.

3. To restrict print access to additional fields, repeat these steps for each additional field.

7. When you are finished adding restrictions to the synonym, close the DBA window and save the synonym.

   In order to access the synonym, a user must issue a SET PASS command and enter one of the user passwords. This command can be issued in any supported profile or in a procedure.

**Pivoting Columns**

You can pivot columns that represent identical data or groups of such columns to display them as rows. This is useful when you want to access their values as one field. For example, if a spreadsheet has a column for each year, you may want to create a row containing all of the years for reporting.
Procedure: How to Pivot Columns

The spreadsheet pivot_demo.xlsx is created as part of the WebFOCUS Retail tutorial and can be uploaded to demonstrate this feature.

1. Click Pivot on the Data Assist ribbon.

The Pivot dialog box opens, as shown in the following image.

2. Enter or select the following values.

   - **Pivot Type.** Select Repeating column or Repeating group of columns.
     If you select Repeating group of columns, some of the information you need to enter changes, as shown in the following image.

   - **First Column.** This is the first column in a group of repeating columns.
   - **Last Column.** This is the last column in a group of repeating columns.
Number of groups. This is the number of groups of columns for repeating groups of columns. For example, if an Excel spreadsheet has data that includes two columns of consecutive data for Plan and Actual figures for six years, this number would be 6.

First column in group. Is the name of the first column in a group. For example, if an Excel spreadsheet has groups of data consisting of two columns called year_plan and year_actual, the first year_plan of the first group would be selected for First column in group.

Last column in group. Is the name of the last column in a group. For example, if an Excel spreadsheet has groups of data consisting of two columns called year_plan and year_actual, the first year_actual of the first group would be selected for Last column in group.

Column Title for Pivoted Value. This is the name for the new column containing the data values. the default is Pivot value. For groups, separate the titles for the columns in the groups with slashes (/).

Column Title for Pivoted Key. This is the name of the new column that identifies the values in the data column. If the source is a spreadsheet this would be the name that could apply to the column headers. The default is Pivot key.

Formula for Pivoted Key. This is automatically calculated based on the values selected for First column/Last column or First column in group/Last column in group.

3. Click OK.

The data is pivoted using an occurs attribute. The following image shows the synonym and its output pane after pivoting the years from 1960 to 2012.

In the original synonym, each year was a column, but in the pivoted synonym, each year is a row.
Other Synonym Enhancements

Other synonym enhancements are available for fields in the Table/Column, Business View, and Output panes, by right-clicking a field. Some of the right-click menu options that are available depend on the data type of the field.

Reference: Right-Click Options for Fields in the Table/Column, Business View, and Output Panes

Insert

Right-click a field to insert one of the following.

- **Filter.** You can open the Filters/Groups pane to create a filter for the field that will select only values satisfying the filter expression. For more information, see Filters/Groups Pane on page 342.

- **Function.** The types of functions available depend on the data type of the field. For more information about individual functions, see the Using Functions manual or generate a Function Parameters report from the FOCUS SETs and Info button on the Workspace page of the Web Console.

Point to a type of function and select one of the functions from the list that appears, as shown in the following image.

![Function Types](image-url)
Selecting Advanced Function opens the expression calculator, described in *Using the Expression Calculator* on page 362.

Once you select a function, a dialog box opens where you can enter any necessary parameters and enter a name and title for the virtual field, as shown in the following image.

When you are finished entering parameters, click OK.

The virtual field is added to the synonym, as shown in the following image.

---

**Grouping.** This option opens the Filters/Groups pane so that you can categorize the field values into groups for sorting. It creates a new virtual field using a conditional expression, as shown in the following image.

For more information about the Filters/Groups pane, see *Filters/Groups Pane* on page 342.
To open the Filters/Groups pane to edit the grouping, you can right-click the virtual field and select *Edit*.

To open the expression calculator for more advanced editing, right-click the virtual field and select *Edit (Advanced)*.

**Phonetic Grouping.** This option is available for grouping alphanumeric fields based on one of two methods for encoding names based on pronunciation, Soundex or Metaphone. Soundex calculates a code for alphanumeric values so that if they sound the same but are spelled differently, they will still have the same code. Metaphone is an improved version of Soundex that takes into account anomalies in English spelling and pronunciation. During upload, this option can correct spelling inconsistencies before actually uploading the data.
For example, upload the file `sales_orders_misspelled_cities.csv` that is in the Uploads folder of the WebFOCUS Retail application.

Right-click the City field in the Geography dimension, point to Insert, and select *Phonetic Grouping*. The group will initially open in the Filters/Groups pane with the data values grouped based on the default phonetic algorithm for your operating environment, as shown in the following image.
Each group contains different spellings of city names that would be pronounced the same way based on the phonetic algorithm used. If you do not agree with a grouping, you can edit it. Any data value that could not be placed in a group based on the phonetic algorithm is placed in a group called (Ungrouped Values). You can move those values into another group, if necessary.

A virtual field is created with an expression that causes all of the values within each group to be uploaded with the correct spelling, as shown in the following image:

![Virtual Field Creation Image]

You can upload both the CITY and CITY_GROUP fields, or hide the CITY field and rename CITY_GROUP to CITY so that the CITY field has the corrected data values.

The options on the group menu specific to phonetic grouping are:

- Recreate groups by Metaphone.
- Recreate groups by SoundEx.

For information about other options for groups, see Filters/Groups Pane on page 342.
- **Binning.** This option opens a wizard for dividing the data values in the field into a specified number of bins based on equal intervals, equal intervals using a formula, or quantiles, as shown in the following image.

The default number of bins is 10, but you can specify a different number for equal intervals and quantiles. For equal intervals via formula, you specify the bin width.

The virtual fields created using this option can be used for sorting.

The following image shows the binning card for bins based on equal intervals.
The virtual field is added to the synonym, as shown in the following image.

<table>
<thead>
<tr>
<th>Sales_Related</th>
<th>Cost of Goods,Bin(1)</th>
<th>Character</th>
<th>0989 &amp; less</th>
<th>0989 &amp; less</th>
</tr>
</thead>
</table>

- **Subquery.** If your data source is relational, you can select this option to create a field that runs a subquery to retrieve the values of the specified field.

**Geographic Role**

You can right-click a field and assign it a geographic role, or change its geographic role assignment if it already has one, as shown in the following image.

To remove a geographic role, select (None).
For a field that has a geographic role assigned, you can generate a sample map, as shown in the following image.
Sample Data

You can right-click a field and select Sample Data to generate sample data for that field, as shown in the following image.
Data Profiling

Data profiling provides reports and charts analyzing the values in a field or, for some reports, for a segment. For most reports, a View menu on the menu bar of the reports lets you generate a printable view of the report, and a binocular search function lets you search for characters. Right-click a field or segment, point to Data Profiling, and select one of the following options.

- **Statistics.** This report lists counts, percents, limits, distinct values, and information about null values in a field or a segment, as shown in the following image.
Key Analysis. This report lists counts and distinct and duplicate counts and percents for a field or a segment, as shown in the following image.

<table>
<thead>
<tr>
<th>Segment</th>
<th>Name</th>
<th>Format</th>
<th>Elements</th>
<th>Count</th>
<th>Distinct Count</th>
<th>Distinct Percent</th>
<th>Duplicate Count</th>
<th>Duplicate Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>MEASGRP1</td>
<td>QUANTITY_SOLD</td>
<td>I11G</td>
<td>1</td>
<td>10000</td>
<td>4</td>
<td>.04</td>
<td>9995</td>
<td>99.95</td>
</tr>
<tr>
<td>MEASGRP1</td>
<td>SALEUNITY</td>
<td>I9C</td>
<td>1</td>
<td>10000</td>
<td>1</td>
<td>.01</td>
<td>9999</td>
<td>99.99</td>
</tr>
<tr>
<td>MEASGRP1</td>
<td>QUANTITY_SOLD/SALEUNITY</td>
<td>I11C9C</td>
<td>2</td>
<td>10000</td>
<td>4</td>
<td>.04</td>
<td>9995</td>
<td>99.95</td>
</tr>
</tbody>
</table>

Patterns. This report shows the patterns of values for alphanumeric fields. The capital A character represents a capital letter, the lowercase a character represents a lowercase letter, and a 9 character represents a numeric character. Other characters represent themselves, as shown in the following image for the customer email field.

<table>
<thead>
<tr>
<th>Pattern</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:AaaaaaaaaAaaaaaaaa9999@aaaaaa.aa">AaaaaaaaaAaaaaaaaa9999@aaaaaa.aa</a></td>
<td>105</td>
<td>1.05</td>
</tr>
<tr>
<td><a href="mailto:AaaaaaaaaAaaaaaaaa9999@aaaaaa.aa">AaaaaaaaaAaaaaaaaa9999@aaaaaa.aa</a></td>
<td>101</td>
<td>1.01</td>
</tr>
<tr>
<td><a href="mailto:AaaaaaaaaAaaa@aaaaa.aa">AaaaaaaaaAaaa@aaaaa.aa</a></td>
<td>100</td>
<td>1.00</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>97</td>
<td>.97</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>87</td>
<td>.87</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>83</td>
<td>.83</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>76</td>
<td>.76</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>68</td>
<td>.68</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>66</td>
<td>.66</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>66</td>
<td>.66</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>66</td>
<td>.66</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>66</td>
<td>.66</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>66</td>
<td>.66</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>65</td>
<td>.65</td>
</tr>
<tr>
<td><a href="mailto:AaaaaAaaaaaaa9999@aaaaaa.aa">AaaaaAaaaaaaa9999@aaaaaa.aa</a></td>
<td>65</td>
<td>.65</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aa">AaaaAaaaAaaa9999@aaaaaa.aa</a></td>
<td>64</td>
<td>.64</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aa">AaaaAaaaAaaa9999@aaaaaa.aa</a></td>
<td>63</td>
<td>.63</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aa">AaaaAaaaAaaa9999@aaaaaa.aa</a></td>
<td>62</td>
<td>.62</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>61</td>
<td>.61</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>61</td>
<td>.61</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>61</td>
<td>.61</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>56</td>
<td>.56</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>56</td>
<td>.56</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>56</td>
<td>.56</td>
</tr>
<tr>
<td><a href="mailto:AaaaAaaaAaaa9999@aaaaaa.aaa">AaaaAaaaAaaa9999@aaaaaa.aaa</a></td>
<td>56</td>
<td>.56</td>
</tr>
</tbody>
</table>
Hex View. This report lists the values in a field and their corresponding hexadecimal equivalents, as shown in the following image.

<table>
<thead>
<tr>
<th>Value</th>
<th>Hex</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:AshleyHawthorne463@gmail.com">AshleyHawthorne463@gmail.com</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AshleyHawthorne393@gmail.com">AshleyHawthorne393@gmail.com</a></td>
<td>410195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AshleyHawthorne864@gmail.com">AshleyHawthorne864@gmail.com</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AaronGregory285@armyspy.com">AaronGregory285@armyspy.com</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AaronShaffer784@telecom.us">AaronShaffer784@telecom.us</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AbbeySparkler154@superpete.co">AbbeySparkler154@superpete.co</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AbbeyDickerson324@ghytya.co">AbbeyDickerson324@ghytya.co</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:Abboudavenav165@javir.nl">Abboudavenav165@javir.nl</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AbbudAzimWaseem532@ghytya.fr">AbbudAzimWaseem532@ghytya.fr</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AbbudKamalMohammed2697@ccatara.fr">AbbudKamalMohammed2697@ccatara.fr</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
<tr>
<td><a href="mailto:AbbudWahhabidatta1184@ccatara.fr">AbbudWahhabidatta1184@ccatara.fr</a></td>
<td>416195C9E786E96874617723436393407375965727269745F2E8782</td>
</tr>
</tbody>
</table>

Values. This report lists the values, count of duplicates, and corresponding percent, as shown in the following image.

<table>
<thead>
<tr>
<th>Value</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$17.99</td>
<td>1</td>
<td>.01</td>
</tr>
<tr>
<td>$22.49</td>
<td>1</td>
<td>.01</td>
</tr>
<tr>
<td>$23.99</td>
<td>5</td>
<td>.05</td>
</tr>
<tr>
<td>$25.49</td>
<td>9</td>
<td>.09</td>
</tr>
<tr>
<td>$26.99</td>
<td>9</td>
<td>.09</td>
</tr>
<tr>
<td>$29.99</td>
<td>82</td>
<td>.82</td>
</tr>
<tr>
<td>$30.00</td>
<td>1</td>
<td>.01</td>
</tr>
<tr>
<td>$35.00</td>
<td>3</td>
<td>.03</td>
</tr>
<tr>
<td>$37.50</td>
<td>1</td>
<td>.01</td>
</tr>
<tr>
<td>$40.00</td>
<td>7</td>
<td>.07</td>
</tr>
<tr>
<td>$41.99</td>
<td>1</td>
<td>.01</td>
</tr>
<tr>
<td>$42.50</td>
<td>5</td>
<td>.05</td>
</tr>
<tr>
<td>$45.00</td>
<td>17</td>
<td>.17</td>
</tr>
</tbody>
</table>
Values Graph. This chart shows a horizontal bar graph of the field values, as shown in the following image. The tooltip for each bar also shows the count of instances of the field.

Values Pie Graph. This chart shows a pie chart of the field values, as shown in the following image for the days delayed field. The tooltip for each bar also shows the count of instances of the field and the percent of the total.
### Duplicate Values

This report lists the values that have multiple instances, the count of instances, and the corresponding percent, as shown in the following image.

<table>
<thead>
<tr>
<th>Value</th>
<th>Count</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>$23.99</td>
<td>5</td>
<td>.05</td>
</tr>
<tr>
<td>$25.49</td>
<td>9</td>
<td>.09</td>
</tr>
<tr>
<td>$26.99</td>
<td>9</td>
<td>.09</td>
</tr>
<tr>
<td>$29.99</td>
<td>82</td>
<td>.82</td>
</tr>
<tr>
<td>$35.00</td>
<td>3</td>
<td>.03</td>
</tr>
<tr>
<td>$40.00</td>
<td>7</td>
<td>.07</td>
</tr>
<tr>
<td>$42.50</td>
<td>5</td>
<td>.05</td>
</tr>
<tr>
<td>$45.00</td>
<td>17</td>
<td>.17</td>
</tr>
<tr>
<td>$50.00</td>
<td>74</td>
<td>.74</td>
</tr>
<tr>
<td>$50.98</td>
<td>2</td>
<td>.02</td>
</tr>
<tr>
<td>$53.98</td>
<td>3</td>
<td>.03</td>
</tr>
<tr>
<td>$59.49</td>
<td>2</td>
<td>.02</td>
</tr>
<tr>
<td>$59.98</td>
<td>34</td>
<td>.34</td>
</tr>
</tbody>
</table>
Outliers. This report shows high and low values with a count of instances that fall outside the bulk of the data for a field, as shown in the following image.

<table>
<thead>
<tr>
<th>High</th>
<th>Count</th>
<th>Low</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>$11,999.55</td>
<td>1</td>
<td>$17.99</td>
<td>1</td>
</tr>
<tr>
<td>$9,447.30</td>
<td>1</td>
<td>$22.49</td>
<td>1</td>
</tr>
<tr>
<td>$7,999.70</td>
<td>2</td>
<td>$23.99</td>
<td>5</td>
</tr>
<tr>
<td>$7,998.00</td>
<td>2</td>
<td>$25.49</td>
<td>9</td>
</tr>
<tr>
<td>$6,998.00</td>
<td>2</td>
<td>$26.99</td>
<td>9</td>
</tr>
<tr>
<td>$6,798.00</td>
<td>6</td>
<td>$29.99</td>
<td>82</td>
</tr>
<tr>
<td>$5,438.40</td>
<td>1</td>
<td>$30.00</td>
<td>1</td>
</tr>
<tr>
<td>$4,499.98</td>
<td>1</td>
<td>$35.00</td>
<td>3</td>
</tr>
<tr>
<td>$4,199.85</td>
<td>1</td>
<td>$37.50</td>
<td>1</td>
</tr>
<tr>
<td>$4,198.80</td>
<td>1</td>
<td>$40.00</td>
<td>7</td>
</tr>
</tbody>
</table>
Stored Procedures

Procedures are reusable components of application logic which can include reporting or extract syntax, and are usually written in the native 4GL language of the server (TABLE). The native language of the server also includes syntax for controlling the execution of events within the request, and is known as Dialogue Manager. Procedures that contain TABLE and Dialogue Manager commands are called FOCEXECs.

Procedures may also be written in compiled and linked 3GL languages, such as C, COBOL, Fortran, Assembler, RPG, and others, and then can be called from the native 4GL language of the server.

This chapter discusses use of tools to create 4GL procedures plus an introduction to the general use of the Dialogue Manager language. The Stored Procedure Reference manual discusses the creation of procedures using 3GL languages.

In this chapter:

- Working With Stored Procedures
- Creating a Stored Procedure
- Using the Web Console Binocular Search
- Using the Web Console Text Editor
- Sending Stored Procedure Report Output to Server-Side Printers
- Editing a Stored Procedure
- Running a Stored Procedure
- Running a Procedure With Advanced Options
- Scheduling a Procedure
- Sending an E-mail Notification for a Procedure
- Procedure Run-Time Processing Essentials
- Platform-Specific Commands and Features
- Stress Testing a Procedure
- Running Impact Analysis Reports

Working With Stored Procedures

Procedures are available from the navigation pane of Application page. You can:

- Create and edit stored procedures.
Run procedures at the present time, at a later time, or under stress conditions (Web Console only).

Run a variety of reports that monitor many aspects of procedure performance.

Creating a Stored Procedure

You can code a stored procedure in the text editor feature that is easily accessible from the Web Console and the Data Management Console.

The contents of a procedure can vary greatly. Reports can be created that go to a user's browser, a configured printer, or held as a data extract in various formats. The reporting and extract language is called TABLE. Additionally, syntax is available to parameterize a request and control the flow of execution in a request. Parameters (called amper variables) and flow of control within a procedure are part of the Dialogue Manager language.

For complete information about TABLE, see the Creating Reports With WebFOCUS Language manual. For complete information about Dialogue Manager commands, see the Developing Reporting Applications manual. While the entire syntax of these features is not within the scope of this manual, it is necessary to provide information about basic run-time essentials.

For information, see Procedure Run-Time Processing Essentials on page 415.

The following is small representative example that embodies reporting (TABLE), parameters (Amper Variables) and execution flow (Dialogue Manager):

-DEFAULT &COUNTRY = ENGLAND
-IF &COUNTRY EQ '' THEN GOTO NOPARM ;
TABLE FILE CAR
PRINT COUNTRY CAR
WHERE COUNTRY = '&COUNTRY' ;
END
-EXIT
-NOPARM
TABLE FILE CAR
PRINT COUNTRY CAR
END

Procedure: How to Create a Stored Procedure

You can create procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.
2. Right-click an application folder, select New, and then Procedure.

A text editing window opens.

3. Type the procedure code, which may be either FOCUS syntax or SQL Passthru syntax. For example:

```
SQL DB2 SELECT x FROM y;
END
```

When using a pure editor environment, you are responsible for the accuracy of the syntax you enter. However, any errors that are generated will be displayed in the right pane, as well as in the Session Log, which you can access from the My Console option on the menu bar.

4. Click the Run or Save As icon.

When you Run the procedure, the output is displayed in the right pane.

When you Save the procedure, the Save As pane opens.
5. Select an application folder, as shown in the following image.

![Application Folder Selection](image)

6. Enter a name in the **File Name** field.

7. Click **OK**.

The procedure is added to the application folder in the navigation pane.

**Using the Web Console Binocular Search**

The binocular search is available on all web Console pages that display a list of files. For example, the binocular search is available on the Synonym Candidates pages, the Manage Files page, and the Application Path Configuration page.
Clicking the binoculars icon opens a Find box where you can enter characters. Click the magnifying glass to implement the search. The magnifying glass icon changes to a stop icon, as shown in the following image.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>File Count</th>
<th>Physical Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>appstudio82</td>
<td>approot</td>
<td>64</td>
<td>C:\apps\appstudio82</td>
<td></td>
</tr>
<tr>
<td>asvwretail</td>
<td>approot</td>
<td>10</td>
<td>C:\apps\asvwretail</td>
<td></td>
</tr>
<tr>
<td>itademo</td>
<td>approot</td>
<td>576</td>
<td>C:\apps\itademo</td>
<td></td>
</tr>
<tr>
<td>itamagn</td>
<td>approot</td>
<td>974</td>
<td>C:\apps\itamagn</td>
<td></td>
</tr>
<tr>
<td>maintain</td>
<td>approot</td>
<td>254</td>
<td>C:\apps\maintain</td>
<td></td>
</tr>
<tr>
<td>map01</td>
<td>approot</td>
<td>1</td>
<td>C:\apps\map01</td>
<td></td>
</tr>
<tr>
<td>session</td>
<td>approot</td>
<td>18</td>
<td>C:\apps\session</td>
<td></td>
</tr>
<tr>
<td>tagclouddrill</td>
<td>approot</td>
<td>5</td>
<td>C:\apps\tagclouddrill</td>
<td>Heidi Bale</td>
</tr>
<tr>
<td>tenants</td>
<td>approot</td>
<td>2</td>
<td>C:\apps\tenants</td>
<td></td>
</tr>
<tr>
<td>wftetail</td>
<td>approot</td>
<td>10</td>
<td>C:\apps\wftetail</td>
<td></td>
</tr>
<tr>
<td>wftetail_bvp</td>
<td>approot</td>
<td>11</td>
<td>C:\apps\wftetail_bvp</td>
<td></td>
</tr>
<tr>
<td>wftetail_enterprise</td>
<td>approot</td>
<td>10</td>
<td>C:\apps\wftetail_enterprise</td>
<td></td>
</tr>
</tbody>
</table>

All matching characters on the list will be highlighted. You can move from one matching row to the next or prior match using the arrow keys.

You can filter the list to display only the rows with matching characters by clicking the Search Options icon. The search options are:

- **Case Sensitive**. Check the box to do a case sensitive search.
- **Contains search item**. Finds all strings that contain the specified characters.
- **Starts with search item**. Finds all strings that start with the specified characters.
- **Ends with search item**. Finds all strings that end with the specified characters.
- **Show only matched items**. Check this box to hide rows that do not contain the specified characters.
Using the Web Console Text Editor

The Web Console Text Editor that is used to edit procedures, files, and server configuration files has line numbers and a search facility. A search for characters in the Find text box opens a window with the list of lines matching the pattern, as shown in the following image.

As you click each line in the Find window, the Web Console text editor scrolls to display that line.

When you edit configuration files from the Workspace tab, the editor toolbar has new actions to:

- Refresh from disk.
- Reset to the server default settings.

Sending Stored Procedure Report Output to Server-Side Printers

A report is spooled to print using a combination of commands. You must issue a FILEDEF (or ALLOCATE on z/OS) command to point to a specific printer, the OFFLINE command to redirect the report request output to the device, the report request itself, and the OFFLINE CLOSE command to close the spooling session (as multiple requests may be spooled as part of a single print output). For details, see Server Side OFFLINE Printing on page 473.
Editing a Stored Procedure

Once you have created a procedure, you can open the text editor to view or revise it.

**Tip:** In addition to editing procedure code, you can copy, delete, or move a procedure component using options on the Applications navigation pane.

**Procedure:** How to Edit a Procedure

You can edit procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, and select Open.
   
   The procedure opens in the text editor.

   **Tip:** Double-clicking the procedure will also open the text editor.

4. When you have made your changes, click the Save, Save As, or Run icon.

Running a Stored Procedure

You can run a procedure from the Web Console or the DMC with the following variations:

- **Run.** Runs the procedure immediately.

- **Run Advanced.** Has the following options:
  
  - **Submit with E-Mail.** Allows you to set up email notification when the procedure starts and/or completes, and to change default values of amper variables.
  
  - **Run Stress.** Records the exact sequence of user actions into a script. For information, see *Stress Testing a Procedure* on page 477.
  
  - **Debug.** Enable you to run the procedure in debug mode. You can step through the code, viewing the result for each line.

Running a Stored Procedure

You can run a stored procedure from an application folder in the navigation pane of the Applications page.
In addition, when you create or edit a stored procedure in the text editor, you can run the procedure directly from that window, with or without first saving it.

**Procedure: How to Run a Procedure**

You can run procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, and select Run.

The output is displayed in the right pane.

If output cannot be generated, an error message is displayed.

**Running a Procedure With Different Variables**

You can run a stored procedure with amper variable values that differ from those originally specified in the procedure.

**Procedure: How to Run a Procedure With Different Variable Values**

You can run procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select Run changing defaults.
4. Enter values for the variables and click Run.

**Note:** You can also change variable values by selecting *Run Advanced* and then *Submit with E-Mail*. There is a *Submit changing defaults* check box on the Submit page that opens.

The output is displayed in the right pane.
Executing a Repository FOCEXEC From EDASPROF

Repository procedures can be executed, and Master and Access Files stored in a repository can be accessed, during server, group, and user profile execution after all DBMS connections and an APP MAP command to the repository have been executed.

For information about creating and managing an SQL Repository, see Managing Applications on page 147.

Prompting for Amper Variables in Procedures

First-level (non-nested) procedures can prompt for Dialogue Manager amper variables with the following exceptions: -IF THEN ELSE branching, -GOTO branching, and -PROMPT with a list amper variable values. (These commands may produce unexpected results.)

Running a Procedure With Advanced Options

You can submit a procedure and specify email options to send an email at start, at completion, and at failure. You can also run a stress test.

**Procedure:** How to Run a Procedure With Advanced Options

You can run a procedure with advanced options.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Expand an application folder.
3. Right-click a procedure, select Run Advanced, and then either Submit with E-Mail, Run Stress, or Run Stress Deferred.

- If you selected Submit with E-Mail, the following page opens.

![Submit procedure ibisamp/flow2xml with E-Mail](image)

Check the submission and log options you want, fill in the email fields if you want to send emails at start or completion, and click Submit.

- If you selected Run Stress or Run Stress Deferred, the following page opens.

![Playback of HTI Script Files](image)

You can fill in the fields to create a test, and click Start to run it, or use the buttons at the top of the window to create a new script file or recording.
Scheduling a Procedure

You can control when and how often a procedure is run using the Schedule and E-mail option on the navigation pane of the Applications page.

Procedure: How to Schedule a Request to Run Once

You can schedule procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select Schedule and E-mail, and then Manage.

The Manage Schedule and E-mail for procedure page opens, as shown in the following image.

4. Select Active from the Scheduler Status drop-down menu.
The Start and stop range section open, as shown in the following image.

5. To set a start date, click the Start Date drop-down menu to open a calendar, and select a date, as shown in the following image.

6. To select a start time, select an hour and minute from the Start Time drop-down menus. Hours are listed for a 24-hour clock.

   Optionally, you can set a forced stop time.

7. Optionally, you can set up email notification when the procedure starts and/or ends in the E-Mail on Start and E-Mail on Completion sections.

   **Note:** To use email notification, the E-mail SMTP Server must be configured from workspace. For information, see *E-mail SMTP Server Settings*.

   You can also specify options for logging.

8. Click Set or Set and Test Run.
**Procedure: How to Schedule a Recurring Request to Run**

You can schedule procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click **Applications**, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select **Schedule/E-mail**, and then **Manage**.
   
   The Manage Schedule and E-mail for procedure page opens.

4. Select the **Active** from the Scheduler Status drop-down menu.

5. In the Schedule Type drop-down list, select **Recurring**.
Additional parameters become available in the General Section, as shown in the following image.

6. Select an interval from the Interval Type drop-down menu. The choices are Minutes, Hourly, Daily, Weekly, Monthly and Yearly.

7. Enter a value in the Interval value field. This specifies the frequency at which the procedure will run. For example, if you chose Weekly as the Interval Type, entering 2 will execute the procedure every two weeks.
8. To set a start date, click the Start Date drop-down menu to open a calendar, and select a date, as shown in the following image.

9. To select a start time, select an hour and minute from the Start Time drop-down menus. Hours are listed for a 24-hour clock.

10. Optionally, you can select the Specify End Date check box, and select an end date and time.

11. Optionally, you can select days of the week or month, intraday start and/or end, as well as how to handle holidays, from the Special date/time ranges section, as shown in the following image.
The Run on Holidays drop-down menu allows you to skip, run, or only run the report on holidays.

12. Optionally you can expand from the Log and output destinations section and select destinations, as shown in the follow image.

13. Optionally, you can set up email notification when the procedure starts and/or ends in the E-Mail on Start and E-Mail on Completion sections.

   **Note:** To use email notification, the E-mail SMTP Server must be configured from workspace. For information, see *E-mail SMTP Server Settings*.

14. Click Set or *Set and Test Run*.

**Procedure:** How to Schedule a Request to Run on Multiple Days

You can schedule procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click *Applications*, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select *Schedule/E-mail*, and then *Manage*.

   The Manage Schedule and E-mail for procedure page opens.

4. Select the *Active* from the Scheduler Status drop-down menu.

5. In the General section, select *Multi-Day* from the Schedule Type drop-down menu.
The Special date/time ranges section opens, as shown in the following image.
6. To set a start date, click the Start Date drop-down menu to open a calendar, and select a date, as shown in the following image.

![Calendar Image]

7. To select a start time, select an hour and minute from the Start Time drop-down menus. Hours are listed for a 24-hour clock.

8. Optionally, you can select the Specify End Date check box, and select an end date and time.

9. Optionally, you can select days of the week or month, as well as how to handle holidays, from the Special date/time ranges section, as shown in the following image.

![Special Date/Time Ranges Image]
The Run on Holidays drop-down menu allows you to skip, run, or only run the report on holidays.

10. Optionally you can expand from the Log and output destinations section and select destinations, as shown in the follow image.

11. Optionally, you can set up email notification when the procedure starts and/or ends in the E-Mail on Start and E-Mail on Completion sections.

**Note:** To use email notification, the E-mail SMTP Server must be configured from workspace. For more information, see *E-mail SMTP Server Settings*.

12. Click Set or Set and Test Run.

**Procedure:** How to Schedule a Request to Run When the Server Starts

You can schedule procedures from the Web Console or the DMC. This procedure will run on every server start.

1. From the Web Console menu bar, click *Applications*, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select *Schedule/E-mail*, and then *Manage*.

   The Manage Schedule and E-mail for procedure page opens.

4. Select the *Active* from the Scheduler Status drop-down menu.
5. In the General section, select *Run when server starts* from the Schedule Type drop-down menu.

6. Optionally, you can set up an email notification when the procedure starts and/or ends in the E-Mail on Start and E-Mail on Completion sections.

   **Note:** To use the email notification option, the E-mail SMTP Server must be configured from the workspace. For information, see *E-mail SMTP Server Settings*. 
7. Optionally, you can expand from the Log and output destinations section and select destinations, as shown in the follow image.

![Log and output destinations](image)

8. Click Set or Set and Test Run.

### Sending an E-mail Notification for a Procedure

You can set up your server to send an email message that notifies recipients of the successful completion or failure of every procedure execution. In addition, you can request that an email message be sent to a designated recipient at the start or end of the request execution.

**Prerequisites:** This procedure assumes that the E-mail SMTP Server has been configured. For information, see *E-mail SMTP Server Settings*.

**Procedure:** How to Send an E-mail Message for a Request

You can set up email for procedures from the Web Console or the DMC.

1. From the Web Console menu bar, click *Applications*, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select *Schedule and E-mail*, and then *Manage*.
   
   The Manage Schedule and E-mail for procedure page opens.

4. Optionally, expand the E-Mail on Start section and enter one or more email addresses in the *Mail to* field. You can optionally send carbon copies and blind carbon copies using the Cc and Bcc fields.

5. In the E-Mail on Completion section, enter an email address in the *Mail to* field. You can optionally send carbon copies and blind carbon copies using the Cc and Bcc fields.

6. Optionally, select the *Advanced* check box in either E-Mail section.
   
   Additional parameters become available, as shown in the following screen.
7. To provide advanced parameters:

- Select an option from the Importance drop-down menu, either Normal, Low or High.
- Enter information in the Subject field.
- Enter information in the E-Mail Message field.
- Select the Send HTML output as inline message check box (only available for E-Mail on Completion).

**Note:** This option will use the report as the email body. Any content in the E-Mail Message field will not be included.

8. Click Set or Set and Test Run.

**Procedure Run-Time Processing Essentials**

A stored procedure is a file of commands that resides on a server and is also known as a FOCEXEC procedure. The procedure typically includes any combination of Dialogue Manager control statements, Dialogue Manager variables, SET commands, SQL syntax, TABLE syntax and other syntax that perform tasks such as report generation or file maintenance, or it simply generates messages.

This section is intended as a basic reference for Dialogue Manager and how it integrates to some basic TABLE tasks. Complete information about Dialogue Manager, see the Stored Procedures Reference manual and Managing Flow of Control in an Application in the WebFOCUS Developing Reporting Applications manual.
Commands in a Stored Procedure

A procedure must reside on disk in an APP location, which may be an APP directory or an APP MAPped directory (or PDS on z/OS PDS deployment). Additionally, a procedure may reside elsewhere and be "sent" to the server by a client application such as the WebFOCUS mid-tier.

With the EXEC (or EX) command, a stored procedure may be called by another stored procedure or by a client application. This is illustrated below.

![Diagram showing a client application calling a stored procedure with EXEC]

In addition to Dialogue Manager commands that control execution flow, and messages (such as the -TYPE above), the following may be included in a procedure:

- SQL and TABLE statements allowed by the server platform.
- Server commands, for example, CALLPGM, EXEC, and END. For details on CALLPGM and EXEC when used to call a compiled 3GL program, see the Stored Procedures Reference manual. This chapter discusses the use of EXEC to call other FOCEXEC procedures.
- Commands allowed in a server profile, such as SET. For details on the profile and its allowable commands, see Server Introduction on page 23.
- Commands that enable portions of a procedure to be executed on a remote alternate server. See the Stored Procedures Reference manual for details on the syntax and use of those commands. Also see the Server Administration manual for commands that connect to a target server, such as SQL EDA SET SERVER.
- The ON TABLE HOLD command, which holds an answer set in a temporary file on a server. See ON TABLE HOLD on page 445 for details on syntax and use.
- The ON TABLE PCHOLD command, which sends an answer set to a client application. See ON TABLE PCHOLD on page 446 for details on the syntax and use.
- Platform-specific commands such as file allocation (that is, DYNAM on z/OS or FILEDEF on other platforms).
## Dialogue Manager Commands and Processing

The following table summarizes the available Dialogue Manager commands. Note that every command begins with a hyphen (-), and this is what differentiates Dialogue Manager syntax from other syntax within a procedure.

The following sections describe the syntax and use of the commands. For an alphabetical list, see the *Stored Procedures Reference* manual.

<table>
<thead>
<tr>
<th>Command</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>-*[text]</td>
<td>Comments within a procedure.</td>
</tr>
<tr>
<td>-?</td>
<td>Displays the value of local variables.</td>
</tr>
<tr>
<td>-UNIX cmd</td>
<td>Executes an operating system command for the respective operating system, and the command is ignored when encountered on a non-applicable operating system, except -SYSTEM which runs on all platforms.</td>
</tr>
<tr>
<td>-WINNT cmd</td>
<td>Note that some platforms use a prior version of the platform name (that is, -AS/400 is for IBM i and -WINNT is for Windows). There are also non <em>dash</em> versions of these commands (and ! is the equivalent of -SYSTEM), but they are not ignored when run on a platform for which they are not relevant.</td>
</tr>
<tr>
<td>-DOS cmd</td>
<td></td>
</tr>
<tr>
<td>-VMS cmd</td>
<td></td>
</tr>
<tr>
<td>-AS/400 cmd</td>
<td></td>
</tr>
<tr>
<td>-ISO RUN cmd</td>
<td></td>
</tr>
<tr>
<td>-SYSTEM cmd</td>
<td></td>
</tr>
<tr>
<td>-CLOSE</td>
<td>Closes an external file opened for reading or writing (an external file is a sequential file in the platform’s file system).</td>
</tr>
<tr>
<td>Command</td>
<td>Function</td>
</tr>
<tr>
<td>-------------</td>
<td>------------------------------------------------------------</td>
</tr>
<tr>
<td>-DEFAULT</td>
<td>Sets a variable to an initial value.</td>
</tr>
<tr>
<td>-DEFAULTS</td>
<td>Executes stacked commands and terminates the procedure. For a definition of stacked commands, see <em>Commands in a Stored Procedure</em> on page 416.</td>
</tr>
<tr>
<td>-EXIT</td>
<td>Forces an unconditional branch to a label.</td>
</tr>
<tr>
<td>-GOTO</td>
<td>Determines the execution flow based on the evaluation of an expression (a conditional branch).</td>
</tr>
<tr>
<td>-IF</td>
<td>Calls another Dialogue Manager FOCEXEC procedure.</td>
</tr>
<tr>
<td>-label</td>
<td>Identifies a section of code that is the target of a -GOTO or -IF.</td>
</tr>
<tr>
<td>-PASS</td>
<td>Directly issues and controls passwords.</td>
</tr>
<tr>
<td>-PROMPT</td>
<td>Types a message to the terminal (if edastart -t is in use) or creates an input window with the message in a browser if the connection type is HTTP and reads the reply from the user. This reply assigns a value to the variable named.</td>
</tr>
<tr>
<td>-QUIT</td>
<td>Terminates the procedure without executing stacked commands.</td>
</tr>
<tr>
<td>-READ</td>
<td>Reads data from an external file.</td>
</tr>
<tr>
<td>-REMOTE BEGIN</td>
<td>Signals the start of commands on an originating server that are to be sent to a target server. Only available with Hub Services.</td>
</tr>
<tr>
<td>-REMOTE END</td>
<td>Signals the end of commands from an originating server.</td>
</tr>
<tr>
<td>-REPEAT</td>
<td>Executes a loop.</td>
</tr>
<tr>
<td>-RUN</td>
<td>Executes stacked commands and closes any external files opened with -READ or -WRITE.</td>
</tr>
<tr>
<td>-SET</td>
<td>Sets a variable to a literal value or to a value computed in an expression.</td>
</tr>
</tbody>
</table>
### Command Function

<table>
<thead>
<tr>
<th>Command</th>
<th>Function</th>
</tr>
</thead>
<tbody>
<tr>
<td>-TYPE</td>
<td>Sends a message to a client application.</td>
</tr>
<tr>
<td>-WRITE</td>
<td>Writes data to an external file.</td>
</tr>
<tr>
<td>-</td>
<td>Line continuation of a prior Dialogue Manager command.</td>
</tr>
</tbody>
</table>

#### Dialogue Manager Command Processing in a Procedure

A procedure processes as follows:

- Dialogue Manager reads each line of the procedure, one by one. Values are substituted for variables encountered in any line.

- All Dialogue Manager commands (commands that start with a "-".) execute as they are encountered.

- Other commands are temporarily stored (stacked) for subsequent execution and are referred to as stacked commands.
The Dialogue Manager commands -RUN and -EXIT force the execution of any stacked commands.

**Example:** Issuing an EXEC (or EX) Call

The following is an example of executing a procedure (SLRPT), with an explanation of the way it processes.

To execute this procedure, the requesting application issues an EXEC (or EX) with the procedure name and supplies values for the required parameters. For example:

```
EX SLRPT COUNTRY=ENGLAND, CAR=JAGUAR
```
The following procedure has been enumerated into sections, and its behavior explained (the numbers on the left are not part of the actual procedure, but are simply supplied as reference points for the explanations):

1. \texttt{-IF &COUNTRY EQ 'DONE' THEN GOTO GETOUT;}

2. \texttt{SQL}
   \texttt{SELECT COUNTRY, CAR, MODEL, BODY}
   \texttt{FROM CAR}
   \texttt{WHERE COUNTRY='&COUNTRY' AND CAR='&CAR'}
   \texttt{ORDER BY CAR;}

3. \texttt{TABLE}
   \texttt{ON TABLE PCHOLD}
   \texttt{END}

4. \texttt{-RUN}

5. \texttt{-EXIT}

   \texttt{-GETOUT}
   \texttt{-TYPE NO PROCESSING DONE: EXITING SP}

The procedure processes as follows:

1. Values for the variables \&COUNTRY and \&CAR are passed to the procedure before the first line executes. Dialogue Manager substitutes the value ENGLAND for the variable \&COUNTRY in the first line and tests for the value DONE. The test fails, so Dialogue Manager proceeds to the next line.

   If the value were DONE instead of ENGLAND, control would pass to the label -GETOUT, and the message NO PROCESSING DONE: EXITING SP would be sent to the client application. (Dialogue Manager would skip the intervening lines of code.)

2. The next five lines are SQL. Dialogue Manager scans each for the presence of variables, substituting the value ENGLAND for \&COUNTRY and the value JAGUAR for \&CAR (remember, those values were passed by EDARPC). As each line is processed, it is placed on a stack to be executed later by the server.

3. The command ON TABLE PCHOLD sends the answer set to the client application.

   The command END delimits ON TABLE PCHOLD.

   After Dialogue Manager processes the command END, the stacked commands look like this:
SQL
SELECT COUNTRY,CAR,MODEL,BODY
FROM CAR
WHERE COUNTRY='ENGLAND' AND CAR='JAGUAR'
ORDER BY CAR;
TABLE
ON TABLE PCHOLD
END

The next line is then processed by Dialogue Manager.

4. The Dialogue Manager command -RUN forces the stacked commands to execute.
5. The Dialogue Manager command -EXIT terminates the procedure.

Using Variables

This section describes how to use variables in a procedure.

Variables fall into two categories:

- Local and global variables, whose values must be supplied by the procedure at run time.
- System and statistical variables, whose values are automatically supplied by the system when referenced.

The following features apply to all variables:

- A variable stores numbers or a string of text, and is placed anywhere in a procedure.

- A variable refers to a command, a database field, a verb, or a phrase.

- The maximum number of variables allowed in a procedure is 1,024. Because approximately 30 are reserved for server use, the maximum number of user-named variables allowed in a procedure is 994.

Naming Conventions

This section describes how to use variables in a procedure.

Variables fall into two categories:

- Local and global variables, whose values must be supplied by the procedure at run time.

- System and statistical variables, whose values are automatically supplied by the system when referenced.

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 (&).
- A global variable name is always preceded by a double ampersand (&&).
- Embedded blanks are not permitted.
- If an anticipated value for a variable might contain an embedded blank, enclose the variable in single quotation marks when you refer to it.
- 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 must be A through Z.
- Assign a number to a variable, instead of a name, to create a positional variable.

**Syntax:**

*How to Use Variables in a Procedure*

\[ \&[\&] name \]

where:

\&name

Is the user-defined name of a local variable. The first character of *name* must be A through Z.

&&name

Is the user-defined name of a global variable. The first character of *name* must be A through Z.

The following variables are properly named:

\&WHICHPRODUCT
\&WHICH_CITY
'\&CITY'
&&CITY

The following variables are improperly named for the reason given:

<table>
<thead>
<tr>
<th>Invalid</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;WHICH_CITY</td>
<td>Contains embedded blank.</td>
</tr>
<tr>
<td>&amp;WHICH-CITY</td>
<td>Contains a hyphen (-).</td>
</tr>
</tbody>
</table>
Local Variables

Once supplied, values for local variables remain in effect throughout a single procedure. The values are lost after the procedure finishes processing and are not passed to other procedures that contain the same variable name.

Example: Using Local Variables

Consider the following procedure in which &CITY, &CODE1, and &CODE2 are local variables.

```
SQL
SELECT SUM (UNIT_SOLD),
       SUM (RETURNS)
FROM SALES
WHERE CITY = '&CITY'
AND PROD_CODE >= '&CODE1'
AND PROD_CODE <= '&CODE2'
```

Assume you supply the following values when you call the procedure:

```
CITY=STAMFORD, CODE1=B10, CODE2=B20
```

Dialogue Manager substitutes the values for the variables as follows:

```
SQL
SELECT SUM (UNIT_SOLD),
       SUM (RETURNS), CITY
FROM SALES
WHERE CITY = STAMFORD
AND PROD_CODE >= B10
AND PROD_CODE <= B20
GROUP BY CITY, PROD_CODE
```
After the procedure executes and terminates, the values STAMFORD, B10, and B20 are lost.

**Global Variables**

Once a value is supplied for a global variable, it remains in effect throughout the session of a processing service, unless cleared by the server. All procedures that contain the same global variable name receive the supplied value until you terminate the session.

**Example:**  Using Global Variables

The following example illustrates the use of three global variables: &&CITY, &&CODE1, &&CODE2.

```sql
SQL
SELECT SUM (UNIT_SOLD),
       SUM (RETURNS)
FROM SALES
WHERE CITY = &&CITY
AND PROD_CODE >= &&CODE1
AND PROD_CODE <= &&CODE2
```

**Predefined System Variables**

There are predefined run-time system variables that you can use in a procedure. Dialogue Manager automatically supplies values for these variables whenever the variables are encountered.

The list within this section shows only the commonly used variables. Additional variables exist for other specific features and are documented in the sections for those features.

Unless otherwise noted in the table, you may override run time values by replacing or adding the parameter values specified.

<table>
<thead>
<tr>
<th>System Variable</th>
<th>Description</th>
<th>Format or Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>&amp;APPROOT</td>
<td>Physical location of the APPROOT directory.</td>
<td>Directory name.</td>
</tr>
<tr>
<td>System Variable</td>
<td>Description</td>
<td>Format or Value</td>
</tr>
<tr>
<td>-----------------</td>
<td>--------------------------------------</td>
<td>---------------------------</td>
</tr>
<tr>
<td>&amp;DATE</td>
<td>Current date.</td>
<td>MM/DD/YY</td>
</tr>
<tr>
<td>&amp;DATE fmt</td>
<td>Current date. fmt is any combination</td>
<td></td>
</tr>
<tr>
<td>&amp;MDY</td>
<td>Current date. Useful for numerical</td>
<td>MMDDYY</td>
</tr>
<tr>
<td>&amp;MDYY</td>
<td>Current date (four-digit year).</td>
<td>MMDDCCYY</td>
</tr>
<tr>
<td>&amp;DMY</td>
<td>Current date.</td>
<td>DDMYY</td>
</tr>
<tr>
<td>&amp;DMYY</td>
<td>Current date (four-digit year).</td>
<td>DDMMCCYY</td>
</tr>
<tr>
<td>&amp;YMD</td>
<td>Current date.</td>
<td>YYMMDD</td>
</tr>
<tr>
<td>&amp;YYMD</td>
<td>Current date (four-digit year).</td>
<td>CCYYMMDD</td>
</tr>
<tr>
<td>System Variable</td>
<td>Description</td>
<td>Format or Value</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------------------------------</td>
<td>---------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>&amp;FOCFOCEXEC</td>
<td>Current running procedure.</td>
<td>Manages reporting operations involving many similarly named requests that are executed using EX. &amp;FOCFOCEXEC enables you to easily determine which procedure is running. &amp;FOCFOCEXEC is specified within a request or in a Dialogue Manager command to display the name of the currently running procedure.</td>
</tr>
<tr>
<td>&amp;FOCINCLUDE</td>
<td>Current included procedure.</td>
<td>Manages reporting operations involving many similarly named requests that are included using -INCLUDE. &amp;FOCINCLUDE is specified within a request or in a Dialogue Manager command to display the name of the current included procedure.</td>
</tr>
<tr>
<td>&amp;ECHO</td>
<td>Current echo tracing value.</td>
<td>ON, OFF, or ALL</td>
</tr>
<tr>
<td>&amp;FOCMODE</td>
<td>Operating environment.</td>
<td>AS/400, MSO, UNIX, VMS or WINNT.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You cannot override the system-supplied value. MSO is the value returned on z/OS. If it is necessary to further test for server PDS verses HFS Deployment. The following may be used: -? SET TEMP &amp;XYZ -SET &amp;XYZ = IF &amp;XYZ EQ 'MVS' THEN 'PDS' ELSE 'HFS' ;</td>
</tr>
<tr>
<td>&amp;FOCPRINT</td>
<td>Current print setting.</td>
<td>ONLINE</td>
</tr>
<tr>
<td></td>
<td></td>
<td>OFFLINE</td>
</tr>
<tr>
<td>&amp;FOCREL</td>
<td>Source code release number.</td>
<td>Release number (for example, R727706D).</td>
</tr>
<tr>
<td>System Variable</td>
<td>Description</td>
<td>Format or Value</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>&amp;IORETURN</td>
<td>Value returned after the last Dialogue Manager -READ or -WRITE operation.</td>
<td>0 Successful operation. 1 End or failure.</td>
</tr>
<tr>
<td>&amp;RETCODE</td>
<td>Return code value from execution of a server or operating system command. Referencing &amp;RETCODE forces the execution of all stacked commands, like the command -RUN.</td>
<td>Any value returned by a command is valid (for example, CALLPGM flag values), but zero is considered normal (successful) execution. The one exception is the &amp;RETCODE value of dash operating system commands, such as -DOS, -UNIX, -VMS, -AS/400, and -WINNT, represent the success, not of the command they are running, but of the ability of the server to spawn out to the OS and run the command. In this case, the &amp;RETCODE value is normally zero because it reflects that the spawn executes normally regardless of the results of the specific command. For this case, the amper variable &amp;EXITRC should be used to check the command result or the non-dash version of the command should be used.</td>
</tr>
<tr>
<td>&amp;EXITRC</td>
<td>Return code value from execution of an operating system command. Referencing &amp;EXITRC forces the execution of all stacked commands, like the command -RUN.</td>
<td>Any value returned by a command is valid, but zero is considered normal (successful) execution.</td>
</tr>
<tr>
<td>&amp;TOD</td>
<td>Current time. When you enter FOCUS, this variable is updated to the current system time only when you execute a MODIFY, SCAN, or FSCAN command. To obtain the exact time during any process, use the HHMMSS subroutine.</td>
<td>HH.MM.SS</td>
</tr>
<tr>
<td>&amp;FOCCODEPAGE</td>
<td>Code page of the server when NLS is configured else varies by platform when not configured.</td>
<td>Numeric, such as 297, not changeable.</td>
</tr>
<tr>
<td>System Variable</td>
<td>Description</td>
<td>Format or Value</td>
</tr>
<tr>
<td>-----------------</td>
<td>-------------</td>
<td>-----------------</td>
</tr>
<tr>
<td>&amp;FOCLANGCODE</td>
<td>Language of the server when NLS is configured, else blank.</td>
<td>String, such as FRE, not changeable.</td>
</tr>
<tr>
<td>&amp;LINES</td>
<td>Number of lines printed in last TABLE.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;RECORDS</td>
<td>Number of records retrieved for last TABLE/GRAPH.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;TRANS</td>
<td>Number of transactions processed.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;ACCEPTS</td>
<td>Accepted transactions.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;NOMATCH</td>
<td>Nomatch rejects.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;FORMAT</td>
<td>Format errors.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;INVALID</td>
<td>Invalid conditions.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;DUPLS</td>
<td>Duplicates rejected.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;INPUT</td>
<td>Segments input.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;CHNGD</td>
<td>Values updated.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;DELTD</td>
<td>Segments deleted.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;RETCODE</td>
<td>Value after DOS command.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;BASEIO</td>
<td>Number of input/output operations.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;READS</td>
<td>Read operations from external file.</td>
<td>Numeric, not changeable.</td>
</tr>
<tr>
<td>&amp;REJECTS</td>
<td>Number of rejected transactions.</td>
<td>Numeric, not changeable.</td>
</tr>
</tbody>
</table>

**Example:** Using Predefined Run-Time System Variables

The following example incorporates the system variable &DATE into an SQL request, testing a user-supplied variable (IDATE) against it.
Supplying Values for Variables

You must supply values for variables in a procedure even if the value is a blank. For instance, some server commands are invalid without values but process normally with blanks.

Supply values for variables in the following ways:

- With the EXEC command as parameters.
- With a command such as -DEFAULTS, -SET, or -READ.

This section describes these methods.

General Rules

The following general rules apply to values for variables:

- The maximum length is 32,000 characters when using the -TYPE or -WRITE command.
- Once a value is supplied for a local variable, it is used throughout the procedure unless it is changed with a command such as -SET or -READ.
- Once a value is supplied for a global variable, it is used throughout the session in all procedures unless it is changed with -SET, -READ, or another command.

Supplying Values in the EXEC Command

The command EXEC enables you to call one procedure from another and set values for variables in the called procedure, using:

- Keyword parameters.
- Positional parameters.
- A combination of keyword and positional parameters.

Syntax: How to Pass Keyword Parameters

`EXEC procedure name=value[, ...]`
where:

*procedure*

Is the name of the called procedure.

*name=value*

Is a keyword parameter.

If *value* contains an embedded comma, blank, or equal sign, it must be enclosed in single quotation marks. For example:

```
EX SLRPT AREA=S, CITY='NY, NY'
```

Name=value pairs must be separated by commas. You do not need to enter pairs in the order in which they are encountered in the procedure.

A procedure with a long list of variables or long values for parameters may be broken onto multiple lines by inserting a comma as the last character on the line and entering the rest of the list on the following line.

**Syntax:** How to Pass Positional Parameters

```
EX[EC]  procedure  parm1[, ...]
```

where:

*procedure*

Is the name of the called procedure.

*parm1*

Is a positional parameter. You do not need to specify the number in the parameter list. Dialogue Manager matches the values, one by one, to the positional variables as they are encountered in the called procedure.

However, you must specify the parameters in the order in which the numeric ampers are used in the procedure.

Consider the following procedure:

```
SQL
SELECT SUM(UNIT_SOLD), SUM(RETURNS), RETURNS/UNIT_SOLD FROM SALES
WHERE PROD_CODE BETWEEN '&1' AND '&2' AND CITY = '&3';
END
```

The calling procedure would be:
Reference: Combining Positional and Keyword Parameters

Consider a procedure with:

SQL
SELECT &1, &2, &FIELD1, &3 FROM CAR;
END

If it is called from another procedure using EXEC, the EXEC command and parameters might look like:

EXEC PPARM1 MODEL,MPG,FIELD1=CAR,COUNTRY

Displaying Execution Flow

Dialogue Manager implements IF THEN ELSE and other flow logic such as -GOTO. The flow logic and other syntax may be displayed (typically for debugging purposes) by using the &ECHO variable.

Syntax: How to Display Command Lines While Executing

EX xxx ECHO=value
-DEFAULTS &ECHO = value
-SET &ECHO = value

Valid values are:

ON
  Displays lines that are expanded and stacked for execution.

ALL
  Displays Dialogue Manager commands as well as lines that are expanded and stacked for execution.

OFF
  Suppresses display of both stacked lines and Dialogue Manager commands. OFF is the default value.

Note that if the procedure is encrypted, &ECHO automatically receives the value OFF, regardless of the value that is assigned explicitly.
-DEFAULT[S] Command

The Dialogue Manager command -DEFAULTS supplies an initial (default) value for a variable that had no value before the command was processed. It ensures that values are provided for variables whether or not they are provided elsewhere.

**Syntax:** How to Supply Values With the -DEFAULT[S] Command

```
-DEFAULT[S] &{&} name=value [...] 
```

where:

&name

Is the name of the variable.

value

Is the default value assigned to the variable.

-SET Command

The -SET command is used to assign a value or computed value to a variable.

**Syntax:** How to Supply Values With the -SET Command

```
-SET &{&} name=(expression|value); 
```

where:

&name

Is the name of the variable. A double amper indicates that the variable is global.

expression

Is a valid expression. An expression may occupy several lines. Each continuation line requires a leading dash (-) in the first character position to indicate that it is a continuation. A -SET always end with a semi-colon.

value

Is a value such as a number or string (enclose the string in single quotation marks if contains an embedded space).
The following are some examples:

<table>
<thead>
<tr>
<th>Example</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>-SET &amp;NUM = 1 ;</td>
<td>Set value</td>
</tr>
<tr>
<td>-SET &amp;FN = JOHN ;</td>
<td>Set value</td>
</tr>
<tr>
<td>-SET &amp;LN = 'JOHN';</td>
<td>Set value with quotes</td>
</tr>
<tr>
<td>-SET &amp;NAME = 'JOHN DOE';</td>
<td>Set value with quotes required by embedded space</td>
</tr>
<tr>
<td>-SET &amp;NAME = &amp;FN</td>
<td>' '</td>
</tr>
<tr>
<td>-SET &amp;NAME = &amp;LN</td>
<td></td>
</tr>
<tr>
<td>-SET &amp;NAME = IF &amp;NAME EQ 'JOHN DOE' THEN 'JOHNATHAN DOE' ELSE &amp;NAME ;</td>
<td>Set value using expression</td>
</tr>
</tbody>
</table>

**Branching**

The execution flow of a procedure is determined using the following commands:

- **–GOTO.** Used for unconditional branching, –GOTO transfers control to a label.

- **–IF...GOTO.** Used for conditional branching, –IF...GOTO transfers control to a label depending on the outcome of a test.

**Syntax:**

How to Use the –GOTO Command for Unconditional Branching

- GOTO label
  
  .
  
  .
  
  -label [TYPE text]
where:

\textit{label}

Is a user-defined name of up to 64 characters. Embedded blanks in labels or using other Dialogue Manager commands as labels is not allowed. It is also advised to not use words that may be confused with functions or arithmetic or logical operations. If a label is not found by search downward in the procedure, it is searched from the beginning a single time (if still not found a user error will occur).

\textit{TYPE text}

Optionally sends a message to the application.

**Syntax:** How to Use the -IF...GOTO Command for Conditional Branching

\begin{align*}
-\text{IF} & \\ \ \text{expression} \ [\text{THEN}] \ \text{GOTO} \ \text{label} \ ; \\
-\text{IF} & \\ \ \text{expression} \ [\text{THEN}] \ \text{GOTO} \ \text{label} \ \text{ELSE} \ \text{GOTO} \ \text{label} \ ; \\
-\text{IF} & \\ \ \text{expression} \ [\text{THEN}] \ \text{GOTO} \ \text{label} \ \text{ELSE IF}\ldots \ ; \\
\end{align*}

\begin{itemize}
  \item \begin{itemize}
    \item \textit{-label} \ [\text{TYPE text}]
  \end{itemize}
\end{itemize}

where:

\textit{label}

Is a user-defined name of up to 64 characters. Embedded blanks in labels, or using other Dialogue Manager commands as labels is not allowed. It is also advised to not use words that may be confused with functions or arithmetic or logical operations. If a label is not found by search downward in the procedure, it is searched from the beginning a single time (if still not found a user error will occur).

\textit{expression}

Is a valid expression. Literals need not be enclosed in single quotation marks unless they contain embedded blanks or commas.

\textit{THEN}

Is an optional keyword that increases readability of the command.

\textit{ELSE GOTO}

Optionally passes control to \textit{label2} when the -IF test fails.

\textit{ELSE IF}

Optionally specifies a compound -IF test.
TYPE text

Optionally sends a message to a client application.

Continuation lines must begin with a hyphen (-) and lines must break between words. A space after the hyphen is not required, but it adds to readability.

**Screening Values With -IF Tests**

To ensure that a supplied value is valid in a procedure, test for its:

- Presence
- Type
- Length

For instance, you would not want to perform a numerical computation on a variable for which alphanumeric data has been supplied.

**Syntax:** How to Test for the Presence of a Value

```
-IF &name.EXIST GOTO label...;
```

where:

- **&name**
  
  Is a user-supplied variable.

- **.EXIST**
  
  Indicates that you are testing for the presence of a value. If a value is not present, a zero (0) is passed to the expression. Otherwise, a non-zero value is passed.

- **GOTO label**
  
  Specifies a label to branch to.

**Syntax:** How to Test for the Length of a Value

```
-IF &name.LENGTH expression GOTO label...;
```

where:

- **&name**
  
  Is a user-supplied variable.
.LENGTH

Indicates that you are testing for the length of a value. If a value is not present, a zero (0) is passed to the expression. Otherwise, the number of characters in the value is passed.

expression

Is the remainder of a valid expression, such as GT 8.

GOTO label

Specifies a label to branch to.

**Syntax:**

How to Test for the Type of a Value

-IF &name.TYPE expression GOTO label...;

where:

&name

Is a user-supplied variable.

.TYPE

Indicates that you are testing for the type of a value. The letter N (numeric) is passed to the expression if the value is interpreted as a number up to $10^9-1$ and is stored in four bytes as a floating point format. In Dialogue Manager, the result of an arithmetic operation with numeric fields is truncated to an integer after the whole result of an expression is calculated. If the value could not be interpreted as numeric, the letter A (alphanumeric) is passed to the expression.

expression

Is the remainder of a valid expression, such as EQ A.

GOTO label

Specifies a label to branch to.

**Calling Another Procedure**

One procedure calls another procedure using:

- The -INCLUDE *file* command, which incorporates a whole or partial procedure into the current procedure and executes it immediately when encountered. Unlike EXEC, no parameters may be passed with -INCLUDE, but they may be -SET on lines prior to the -INCLUDE. A -INCLUDE procedure can be a partial procedure that may contain header text or code to include at run time based on a step in the originating procedure.
- The command EXEC. The command is stacked and executed when the appropriate Dialogue Manager command is encountered. The called procedure must be fully executable.

**Syntax:** How to Use the -INCLUDE Command

Lines incorporated with a -INCLUDE are processed as though they had been placed in the calling procedure originally.

```
-INCLUDE filename
```

where:

`filename`

Is the name of the called procedure.

A calling procedure cannot branch to a label in a called procedure, and vice versa.

**Nesting**

Any number of different procedures may be invoked as a -INCLUDE from within a single calling procedure. Called procedures can also call (nest) additional procedures. The same procedure may even call itself recursively. However, recursive calls are limited to four levels deep.

**The EXEC Command**

A procedure also calls another one with the command EXEC. The called procedure must be fully executable.

See *Supplying Values for Variables* on page 430 for additional information about passing parameter values.

**Syntax:** How to Use the EXEC (or EX) Command

Procedure lines with EXEC (or EX) commands temporarily stop execution of the current procedure and call the new procedure. The new procedure may be passed current variables that are available as parameter values to the new procedure, but must do so explicitly unless those variables are global variables.

```
EXEC [appname/]filename [parm[, ...]]
```

where:

`appname`

Is the location of the called procedure.
filename

Is the name of the called procedure.

dparm[, ...]

Are one or more parameters being passed, either positionally or by name.

Creating Expressions

An expression consists of variables and literals (numeric or alphanumeric constants) that are combined arithmetically, logically, or in some other way to create a new value.

This section describes how to create:

- Arithmetic Expressions on page 439.
- Alphanumeric Expressions on page 441.
- Logical Expressions on page 442.
- Compound Expressions on page 444.

Arithmetic Expressions

An arithmetic expression is:

- A numeric constant, for example, 1.
- Two variables joined by one of the following arithmetic operators:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>+</td>
<td>Addition</td>
</tr>
<tr>
<td>-</td>
<td>Subtraction</td>
</tr>
<tr>
<td>*</td>
<td>Multiplication</td>
</tr>
<tr>
<td>/</td>
<td>Division</td>
</tr>
<tr>
<td>**</td>
<td>Exponentiation</td>
</tr>
</tbody>
</table>

An example is:

&DELIVER_AMT / &OPENING_AMT
Two or more arithmetic expressions, joined by one of the operators in the preceding list. An example is:

\[(\&\text{RATIO} - 1)^{\ 2}\]

A compound expression or function that gives an arithmetic result.

**Example:** Using Arithmetic Expressions

Following are some arithmetic expressions used in the command `-SET`:

- `SET &COUNT = 1;
- `SET &NEWVAL = (&RATIO - 1)^{\ 2};
- `SET &RATIO = (&DELIVER\_AMT * 100) / (&OPENING\_AMT);

**Reference:** Guidelines for Using Arithmetic Expressions

Keep the following in mind as you create arithmetic expressions:

- If you attempt to divide by 0, Dialogue Manager sets the result to 0.

Arithmetic operations are performed before logical operations, in the following order:

<table>
<thead>
<tr>
<th>Operator</th>
<th>Meaning</th>
</tr>
</thead>
<tbody>
<tr>
<td>**</td>
<td>Exponentiation</td>
</tr>
<tr>
<td><code>/ </code></td>
<td>Division and multiplication</td>
</tr>
<tr>
<td><code>+ - </code></td>
<td>Addition and subtraction</td>
</tr>
</tbody>
</table>

- For operations on the same level (for example, division and multiplication), the evaluation is performed from left to right.

- An expression in parentheses is evaluated before any other expression.

- Values for local and global variables (amper variables) are stored internally as character strings, including numeric values. If a calculation is performed on an amper variable, the variable is first converted from a character string into a numeric. After the whole result is calculated, the result of arithmetic operations with numeric fields is truncated to the integer field. Finally, the result is converted back into a character string.
Alphanumeric Expressions

An alphanumeric expression is:

- A literal enclosed in single quotation marks, for example 'Smith John'.
- A logical expression that yields an alphanumeric result.
- A function that yields an alphanumeric result.
- Two or more alphanumeric variables or literals combined into a single string. See How to Concatenate Alphanumeric Variables and Literals on page 441 for the syntax and an example.

Syntax: How to Concatenate Alphanumeric Variables and Literals

```
variablename = (alphaexp1|'literal') concatenation
              {alphaexp2|'literal'} [...]
```

where:

- `variablename`  
  Is the name of the variable assigned to the result of the concatenation.

- `alphaexp1, alphaexp2`  
  Are local or global variable that forms part of the concatenation.

- `literal`  
  Is a literal that forms part of the concatenation. It must be enclosed in single quotation marks.

- `concatenation`  
  Is one of the following symbols:

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Example: Concatenating Alphanumeric Variables and Literals

```
-SET &NAME = &LASTNAME || ',' || &FIRST_INIT;
```
Logical Expressions

A logical expression contains logical and relational operators and is evaluated to a value that is true or false.

**Example:** Forming a Logical Expression

This example shows various elements that are used to form a logical expression. The abbreviation `exp` stands for expression.

```plaintext
(arithmetic exp | alphanumeric exp) operator1 (numeric lit | alphanumeric lit) OR...
expression operator2 expression
logical exp (AND | OR) logical exp
NOT logical exp
```

where:

- **operator1**
  - Is one of the following: EQ, NE, OMITS, or CONTAINS.

- **expression**
  - Is either an arithmetic, alphanumeric, or logical expression.

- **operator2**
  - Is one of the following: EQ, NE, LE, LT, GE, or GT.

The following table defines valid operators (EQ, NE, and so on) used in this example.

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>EQ</td>
<td>Tests for a value equal to another value.</td>
</tr>
<tr>
<td>NE</td>
<td>Tests for a value not equal to another value.</td>
</tr>
<tr>
<td>OMITS</td>
<td>Tests for a value that does not contain a matching character string.</td>
</tr>
<tr>
<td>CONTAINS</td>
<td>Tests for a value that does contain a matching character string.</td>
</tr>
<tr>
<td>Operator</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------</td>
</tr>
<tr>
<td>LE</td>
<td>Tests for a value less than or equal to another value.</td>
</tr>
<tr>
<td>LT</td>
<td>Tests for a value less than another value.</td>
</tr>
<tr>
<td>GE</td>
<td>Tests for a value greater than or equal to another value.</td>
</tr>
<tr>
<td>GT</td>
<td>Tests for a value greater than another value.</td>
</tr>
<tr>
<td>AND</td>
<td>Returns a value of true if both of its operands are true.</td>
</tr>
<tr>
<td>OR</td>
<td>Returns a value of true if either of its operands is true.</td>
</tr>
<tr>
<td>NOT</td>
<td>Returns a value of true if the operand is false.</td>
</tr>
</tbody>
</table>

**Reference:** Guidelines for Alphanumeric and Logical Expressions

Keep the following in mind:

- An alphanumeric literal with embedded blanks or commas must be enclosed in single quotation marks. For example:
  
  ```
  IF &NAME EQ 'JOHN DOE' GOTO QUIT;
  ```

  To produce a single quotation mark within a literal, place two single quotation marks where you want one to appear:

  ```
  IF &NAME EQ 'JOHN O''HARA' GOTO QUIT;
  ```

- A computational field may be assigned a value by equating it to a logical expression. If the expression is true, the field has a value of 1; if the expression is false, the field has a value of 0.

- Use OR to connect literals or other expressions. You must also use parentheses to separate expressions connected with OR.

- Logical operations are done after arithmetic operations, in the following order:
  
  ```
  EQ NE LE LT GE GT NOT CONTAINS OMITS
  ```

  ```
  AND
  ```

  ```
  OR
  ```
Separate a collection of test values with OR:

```
-IF &STATE EQ 'NY' OR 'NJ' OR 'WA' GOTO QUIT;
```

In this case, OR and EQ are evaluated at the same level.

Use parentheses to specify a desired order. An expression in parentheses is evaluated before any other expression. For example, the command

```
-IF &STATE EQ 'NY' AND &COUNTRY EQ 'US' OR 'UK' THEN...
```

is evaluated as:

```
IF &STATE EQ 'NY' IF &COUNTRY EQ 'US'...
```

Dialogue Manager then evaluates the phrase OR UK and indicates that it is a syntax error. To write the command correctly, add parentheses:

```
-IF ((&STATE EQ 'NY') AND (&COUNTRY EQ 'US' OR 'UK')) THEN...
```

### Compound Expressions

A compound expression has the following form:

```
-IF expression THEN expression ELSE expression;
```

The following restrictions apply:

- Each of the expressions may itself be a compound expression, although the expression following `-IF` may not be a `-IF...THEN...ELSE` expression (for example, `-IF...-IF...`).

- If the expression following `THEN` is itself a compound expression, it must be enclosed in parentheses; this rule does not apply to an expression following `ELSE`.

- Compound expressions only have up to 16 `-IF` commands.

**Example:** Using Compound Expressions

If the following example is executed without an input parameter list, the client application receives the message NONE. If it executes with the parameter BANK=`'FIRST NATIONAL'`, the client application receives the message FIRST NATIONAL.

```
-DEFAULTS &BANK = ' 
-SET &BANK = IF &BANK EQ ' ' THEN 'NONE'
-ELSE &BANK;
-TYPE &BANK
```
The next example uses a compound expression to define a truth condition (1 is true and 0 is false).

-DEFAULTS &CURR_SAL = 900, &DEPARTMENT=MIS
-SET &MYTEST = (&CURR_SAL GE 1000) OR (&DEPARTMENT EQ MIS);
-IF &MYTEST EQ 1 THEN GOTO YES ELSE GOTO NO;
-YES
-TYPE YES
-EXIT
-NO
-TYPE NO

When this code is executed, the client application receives the message YES.

**ON TABLE HOLD**

When a server receives the results of an SQL request (an answer set) from another server, the answer set will either:

- Be returned to the client application using ON TABLE PCHOLD. That command is described in **ON TABLE PCHOLD** on page 446.
- Be held on the initiating server, without sending it back to the client application, using ON TABLE HOLD. A corresponding Master File for the file that holds the answer set is also created.

**Syntax:** How to Use the ON TABLE HOLD Command

```sql
SQL
SQL request;
ON TABLE HOLD [AS filename] FORMAT format
END
```

where:

**filename**

Is the name of the file that holds the answer set. If `filename` is omitted, the name of the held file on the server is HOLD, and subsequent creations of HOLD files overlay each other. The file name is a symbolic name known to the operating system for the server environment.

**format**

A valid format option for the server. The following is a list of commonly used values are:
ALPHA, BINARY, COMMA, COMT, DB2, DIF, DOC (WebFOCUS ONLY), EXCEL, EXL2K (WebFOCUS ONLY), EXL2K PIVOT (WebFOCUS ONLY), FOCUS, HTML, HTM TABLE, INGRES, INTERNAL, LOTUS, PDF, POSTSCRIPT, REDBRICK, SQL, SQLDBC, SQLINF, SQLMAC, SQLMSS, SQLODBC, SQLORA, SQLSYB, SYLK, T ABT, WK1, and WP.

The above list is not intended to be a complete list, and the use of some of these formats is limited to use with a configured adapter.

END

Is required on a separate line.

ON TABLE PCHOLD

In order for a Dialogue Manager procedure to return an answer set to a client application, a certain set of commands must be issued directly after the SQL request in the syntax of the procedure.

Syntax: How to Use the ON TABLE PCHOLD Command

SQL
SQL request;
TABLE
ON TABLE PCHOLD [FORMAT ALPHA]
END

where:

SQL request;

Is a valid SQL request, ending with a semicolon.

FORMAT ALPHA

Optionally specifies that the hold file on the client is a text file. Use any valid format available on the client, but the underlying transfer is in alpha format. FORMAT ALPHA is the default value.

END

Is required on a separate line.

Example: Using the ON TABLE PCHOLD Command

This example shows how the ON TABLE PCHOLD command requests information from a table in a catalog.
The result of the request is an answer set sent to the client application by the server.

Platform-Specific Commands and Features

This topic describes platform-specific commands that may be included in a procedure for various purposes. However, it always best to avoid the use of platform-specific commands, as they can affect the portability of an application to new environments.

The nature of z/OS, PDS Deployment, and security requires operating system commands to be a limited command set, and use of the keyword DYNAM to preface commands, where other environments are free to simply jump to the operating system command level and executable anything the application user has access to. DYNAM commands are also allowed in z/OS HFS Deployment.

On platforms other than z/OS PDS Deployment, native commands are directly available using the -SYSTEM, -UNIX, -VMS, -WINNT, and -AS/400 series of commands.

File references that are symbolic logical names for the purpose of -READ, -WRITE, TABLE (using external files), and HOLD AS require a DYNAM ALLOC (PDS) or FILEDEF to create the logical reference.

For more information about reporting, see the Creating Reports With WebFOCUS Language manual. For more information about Dialogue Manager, see the Developing Reporting Applications manual.

DYNAM Command (z/OS PDS and HFS Deployments)

This section describes the DYNAM command and its subcommands.

Syntax: How to Use the DYNAM Command

The DYNAM command manipulates data sets under MVS.

DYNAM subcommand operand [operand]...
where:

*subcommand*

Is required, and specifies one of the operations (subcommands) in the list below. The abbreviated form of the subcommand’s syntax is given under the full form. Details on each subcommand are provided in the following sections as noted.

<table>
<thead>
<tr>
<th>subcommand</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALLOCATE</td>
<td>Allocates a data set. See The ALLOCATE Subcommand on page 450.</td>
</tr>
<tr>
<td>ALLOC</td>
<td>Concatenates data sets. See The CONCAT Subcommand on page 459.</td>
</tr>
<tr>
<td>ALLO</td>
<td>Frees data sets specified by ddnames or dsnames. Names may contain wildcard characters. See The FREE Subcommand on page 460.</td>
</tr>
<tr>
<td>CONCAT</td>
<td>Closes data sets. Use this subcommand when data sets cannot be freed because of being open. See The CLOSE Subcommand on page 461.</td>
</tr>
<tr>
<td>CONC</td>
<td>Copies an entire data set or selected partitioned data set (PDS) members. This subcommand provides features such as record format conversion, either automatic or option controlled. See The COPY Subcommand on page 462.</td>
</tr>
<tr>
<td>FREE</td>
<td>Copies a sequential data set or PDS member. COPY handles all the features of COPYDD, and is recommended for use instead of COPYDD. See The COPYDD Subcommand on page 464.</td>
</tr>
<tr>
<td>CLOSE</td>
<td>Deletes an entire data set or selected PDS members. See The DELETE Subcommand on page 465.</td>
</tr>
<tr>
<td>CLO</td>
<td>Renames an entire data set or selected PDS members. See The RENAME Subcommand on page 466.</td>
</tr>
<tr>
<td>COPY</td>
<td>Submits MVS jobs. See The SUBMIT Subcommand on page 467.</td>
</tr>
<tr>
<td>COPYDD</td>
<td>Compresses a PDS. See The COMPRESS Subcommand on page 468.</td>
</tr>
</tbody>
</table>
operand

May be a keyword, a keyword followed by its parameter, or a parameter without a keyword.

The following rules apply to the DYNAM command:

- The subcommand, keywords, and parameters are separated with one or more blanks. Keywords are coded in free format.

- A parameter may be a list of subparameters (for example, VOLUME for a multi-volume data set). Separate subparameters in the list using commas. To include blanks between subparameters (with or without the comma), enclose the entire list in parentheses. For example:

  \[ A, B \ (A, B) \ (A, B) \ (A, B) \ (A, B C, D) \]

- A DYNAM command may span several lines. Enter a hyphen (-) at the end of each line to be continued. When the lines are concatenated, blanks after the hyphen and leading blanks from the next line are removed. Blanks before the hyphen are removed if they are preceded by a comma. The total length of a DYNAM command may not exceed 2,048 characters.

- Most keywords may be truncated up to the shortest unambiguous length. The commonly used abbreviations are fixed. Note that the unique truncation of a keyword may not always be valid as new keywords are added. It is recommended that the full keyword be used in files.

- Fixed abbreviations are given in the following sections on the subcommands. For example, DDNAME may be abbreviated as DD, DDN, DDNA, DDNAM, or DDNAME.

- Certain keywords have synonyms. For example, the keywords FILENAME and DDNAME are synonyms, and so are DATASET and DSNAME.

- As in TSO, a data set name is enclosed in single quotation marks. Prefix substitution is not supported; specify only the fully qualified data set names in JCL.

- Some DYNAM commands accept either the ddname or data set name (dsname) as the same parameter. In such cases, the parameter is considered a ddname if it is not longer than 8 bytes, does not contain periods (.), and is not enclosed in single quotation marks (’). Otherwise, the parameter is considered a data set name. Thus, to specify an unqualified data set name, enclose it in single quotation marks.

**Use of Data Sets**

z/OS PDS Deployment obtains a lock for any allocated data set name; a shared lock for those specified as SHR, and an exclusive lock for OLD, NEW, or MOD.
Although data sets are allocated more than once in a job step, only one type of lock may be obtained. For example, if the data set is initially allocated as SHR and is then allocated as OLD in the same step, the MVS lock changes from shared to exclusive, and the data set is not available for use by other jobs until all allocations in the job are freed.

The DYNAM commands that manipulate data sets use an improved locking mechanism, similar to that implemented in ISPF:

- Any output PDS is allocated by DYNAM (or pre-allocated by the user) as SHR. This avoids exclusive MVS locking, which lasts until all data set allocations are freed.

- To protect from simultaneous updating, DYNAM obtains an exclusive lock as used by ISPF (and other programs, including LINKEDIT), but only during the actual update time. This lock controls access to the data set between users, even from within the same job step.

**Note:** The DYNAM locking mechanism protects from simultaneous updating and possible corruption of data, but does not protect from updating and simultaneous reading. For example, it is possible to continue to read a PDS member recently deleted by another user.

### The ALLOCATE Subcommand

The DYNAM ALLOCATE command allocates a data set.

**Syntax:**

DYNAM ALLOCATE [disposition] [CLOSE]

DDNAME ddname [DEFER] [DSNAME dsname[,memname]] [DUMMY]
[EXPD T date]
[HIPER OFF]

[INPT|OUTPT]

[LABEL type]
[MEMBER memname] [status] [MSVGP msvgp]

[PARALLEL] [PASSWORD password] [PERM] [POSITION nnnn]
[REFVOL dsname] [RETPD days] [REUSE]
[UNIT unit]
[VOLUME volser]

Space operands are:

[format]

[parameter]
DCB operands are:

[BLKSIZE \( n \)] [BUFNO \( n \)]
[DEN \( n \)] [DSORG \( dsorg \)]
[LRECL \( n \)]
[RECFM \( recfm \)] [REFDD \( ddname \)] [REFDSN \( dsname \)]

SMS and VSAM operands are:

[DATACLASS \( name \)] [DSNTYPE|{LIBRARY|PDS}]

[KEYOFF \( n \)]
[LIKE \( dsname \)]
[MGMTCLASS \( name \)]
[RECORD \( recorg \)]
[SECMODEL \( name \)] [STORCLASS \( name \)]
[BUFND \( m \)]
[BUFNI \( n \)]

Output printing operands are:

[DEST \( dest[.user] \)]

[FCB \( name \) [ALIGN|VERIFY]] [FORMS \( name \)]

[HOLD]
[OUTLIM \( n \)] [OUTPUT \( name \)]
[SYSOUT \( class \)]
[USER \( user \)]
[WRITER \( name \)]

where:

ALLOCATE

Can be abbreviated as ALLOC or ALLO.
**disposition**

Is one of the following:

- **CATALOG**
- **DELETE**
- **KEEP**
- **UNCATALOG**

By default, for a data set status of NEW, if *dsname* is specified, the disposition is CATALOG; otherwise, the disposition is DELETE. Is incompatible with SYSOUT. CATLG and UNCAT are also valid as synonyms for CATALOG and UNCATALOG. DELETE, KEEP, and UNCATLOG follow the standard MVS meanings of delete after free, keep as is after free, and keep uncataloged.

**CLOSE**

Is deallocation of the data set at close, rather than at the end of the step. The JCL analogy is FREE=CLOSE.

**DDNAME** *ddname* DD

Is the DDNAME to be associated with an allocation; it must be specified. Synonym is FILENAME.

**DEFER**

Assigns device(s) to the data set but defers mounting of the volume(s) until the data set is opened. The JCL analogy is DEFER in UNIT.

**DSNAME** *dsname* *(memname)*

The member name is specified either in parentheses after *dsname* or using keyword MEMBER (see also MEMBER). If *dsname* is specified as an asterisk (*), terminal is allocated. This is used for output only. Synonym is DATASET.

**DUMMY**

Allocates a dummy data set.

**EXPDT** *date*

Is the expiration date in format YYDDD, YYYY/DDD, or YYYYDDD. Is incompatible with RETPD and SYSOUT.

**HIPER OFF**

Prohibits allocation in a hiperspace. Is equivalent to UNIT NOHIPER, and is used when UNIT is also to be specified. For example, UNIT VIO HIPER OFF.
INPT
Data set is to be processed as input only (INPT) or output only (OUTPUT). The JCL analogy is IN in LABEL. Is incompatible with SYSOUT.

OUTPT
Data set is to be processed as input only (INPT) or output only (OUTPUT). JCL analogy: IN in LABEL. Is incompatible with SYSOUT.

LABEL type
Specifies type of volume labels. Can be one of the following: NL, SL, NSL, SUL, BLP, LTM, AL, or AUL. Is incompatible with SYSOUT.

MEMBER memname
Is the name of a PDS member to be allocated. See also DSNAME.

status
Is the data set status. Possible values are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>NEW</td>
<td>is the default data set status. Incompatible with SYSOUT.</td>
</tr>
<tr>
<td>MOD</td>
<td>is an extended data set.</td>
</tr>
<tr>
<td>OLD</td>
<td>is exclusive control of the data set.</td>
</tr>
<tr>
<td>SHR</td>
<td>is shared access to the data set.</td>
</tr>
</tbody>
</table>

MSVGP msvgp
Is the identification of a group of mass storage system (MSS) virtual volumes. Is incompatible with SYSOUT and VOLUME.

PARALLEL
Each volume is to be mounted on a separate device. The JCL analogy is P in UNIT.

PASSWORD password
Password for a password-protected data set.

PERM
The allocation is to be permanent—that is, protected from being freed or concatenated by any DYNAM command issued by an MSO user. The operand is valid only in an MSO server initialization profile.
POSITION nnnn

Data set sequence number on a tape volume, up to 9999. The JCL analogy is the first subparameter in LABEL.

REFVOL dsname

Volume serial information is to be obtained from the named cataloged data set. The JCL analogy is VOL=REF=dsname. Is incompatible with SYSOUT and VOLUME.

RETPD days

Is the retention period, up to 9999 days. Is incompatible with EXPDT and SYSOUT.

REUSE REU

If the ddname to be allocated is already in use, it is to be freed.

UNIT unit

Is the device group name, device type, specific unit address, or NOHIPER. NOHIPER prohibits allocation in a hiperspace, and is meaningful for a temporary (NEW, DELETE) data set; see also HIPER OFF.

VOLUME volserVOL

Are volume serial numbers. Are incompatible with REFVOL and SYSOUT. Synonyms are VOLUME and VOLser.

Space operands may be:

format

The format of the primary space to be allocated. Possible values are:

ALX is up to five contiguous areas.

CONTIG is one contiguous area.

MXIG is one maximal contiguous area.

JCL analogy: ALX/CONTIG/MXIG in SPACE.

n

Represents units of primary and secondary space allocation.

parameter

The parameter for space allocation. Possible values are:
BLOCKS \( [n] \)
CYLINDERS
MEGABYTES
PAGES
TRACKS

\( n \) represents units of primary and secondary space allocation. If the parameter for BLOCKS is omitted, the average block length is copied from BLKSIZE. If the space unit is omitted but SPACE and BLKSIZE are specified, BLOCKS equal BLKSIZE is used. For PAGES, BLOCKS 4096 is used. BLKSIZE must be specified if the BLOCKS parameter is specified.

Synonyms are CYLs for CYLINDERS and TRKs for TRACKS.

DIR \( n \)
The number of 256-byte records for the directory of a PDS.

PRIMARY \( n1 \)
The primary space quantity. See also SPACE.

RELEASE
The unused space is to be released when the data set is closed. Synonym is RLSE.

ROUND
If space is requested in BLOCKS, MEGABYTES, or PAGES, it is to be rounded to whole cylinder(s).

SECONDARY \( n2 \)
Is the secondary space quantity. See also SPACE.

SPACE \( \text{space} \ SP \)
The primary (\( n1 \)) and/or secondary (\( n2 \)) space quantity in one of the following formats:
\( n1/(n1)/n1,n2/(n1,n2)/n1\ n2/(n1\ n2)/,n2/(,n2) \)

See also PRIMARY and SECONDARY.

DCB operands may be:

BLKSIZE \( n \)
The block size, up to 32760. See also BLOCKS.

BUFNO \( n \)
The number of buffers, up to 255.
DEN n

n represents magnetic tape density: 0, 1, 2, 3, or 4 for 200, 556, 800, 1600, 6250 bpi respectively.

DSORG dsorg

The data set organization. Default, for NEW only: PO if DIR or DSNTYPE specified; PS otherwise. Following values are syntactically correct:

<table>
<thead>
<tr>
<th>VS</th>
<th>VSAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>PO/POU</td>
<td>PDS or PDS unmovable.</td>
</tr>
<tr>
<td>DA/DAU</td>
<td>Direct access or direct access unmovable.</td>
</tr>
<tr>
<td>PS/PSU</td>
<td>Physical sequential or physical sequential unmovable.</td>
</tr>
</tbody>
</table>

LRECL n

The logical record length, up to 32760.

RECFM recfm

The record format. The first letter must be D, F, U, or V, which may be followed by any valid combination of A, B, M, S, or T:

<table>
<thead>
<tr>
<th>A</th>
<th>Records with ISO/ANSI control characters.</th>
</tr>
</thead>
<tbody>
<tr>
<td>B</td>
<td>Blocked records.</td>
</tr>
<tr>
<td>D</td>
<td>Variable-length ISO/ANSI tape records.</td>
</tr>
<tr>
<td>F</td>
<td>Fixed-length records.</td>
</tr>
<tr>
<td>M</td>
<td>Records with machine code control characters.</td>
</tr>
<tr>
<td>S</td>
<td>Standard fixed-length or spanned variable-length records.</td>
</tr>
<tr>
<td>T</td>
<td>Track overflow.</td>
</tr>
<tr>
<td>U</td>
<td>Undefined-length records.</td>
</tr>
</tbody>
</table>
Variable-length records.

**REFDD  ddname**

DCB attributes are to be copied from the specified *ddname*. Under TSO, EXPDT and INPT/OUTPT specifications are also copied. Any of those can be overridden by the appropriate keyword on the same command. The JCL analogy is DCB=*.*. Is incompatible with REFDSN.

**REFDSN  dsname**

DCB attributes (DSORG, RECFM, OPTCD, BLKSIZE, LRECL, RKP, KEYLEN) and EXPDT are to be copied from the specified cataloged data set. Any of those can be overridden by the appropriate keyword on the same command. The JCL analogy is DCB=*.*. Is incompatible with REFDD.

**SMS and VSAM operands are:**

**DATACLASS  name**

The name of a data class for an SMS-managed data set.

**DSNTYPE  {LIBRARY|PDS}**

LIBRARY is for a new partitioned extended (PDSE), and PDS is for a new partitioned data set. A PDSE cannot contain load modules, should be SMS-managed, and allows concurrent updating of different members.

**KEYOFF  n**

The offset of the key in each logical record for a new VSAM key-sequenced (RECORG KS) data set.

**LIKE  dsname**

Allocation attributes (DSORG, RECORG, or RECFM, LRECL, KEYLEN, KEYOFF, SPace, DIR) are to be copied from the specified cataloged data set (model). Any of those can be overridden by the appropriate keyword on the same command.

**MGMTCLASS  name**

The name of a management class for an SMS-managed data set.

**RECORG  recorg**

The VSAM record organization: KS, ES, RR, or LS for key-sequenced, entry-sequenced, relative record, or linear space data sets, respectively.
**SECMODEL name**

The data set RACF profile is to be copied from the named existing RACF profile.

**STORCLASS name**

The name of a storage class for an SMS-managed data set.

**BUFND m**

The number of VSAM DATA buffers.

**BUFNI n**

The number of VSAM INDEX buffers.

Output printing operands may be:

**DEST dest[.user]**

The remote destination for a SYSOUT data set. In conjunction with user ID, it is a node and a user at that node; the user ID is coded after the period (.) or using the USER keyword.

**FCB name [ALIGN/VERIFY]**

The name of an FCB (forms control buffer) image to be used for printing of a data set. The operator may be asked to check the printer forms alignment (ALIGN), or to verify the FCB image name displayed on the printer (VERIFY).

**FORMS name FORM**

A SYSOUT form name. JCL analogy: third subparameter in SYSOUT, FORMS in OUTPUT JCL.

**HOLD**

A SYSOUT data set is to be placed on the hold queue.

**OUTLIM n**

A limit for the number of logical records in a SYSOUT data set.

**OUTPUT name**

The name(s) of OUTPUT JCL statement(s) to be associated with a SYSOUT data set.

**SYSOUT class**

A SYSOUT data set is to be allocated and the specified output class (A-Z, 0-9) is to be assigned. If an asterisk (*) or NULL is coded, the class is copied either from CLASS in OUTPUT JCL if it is specified, or otherwise from MSGCLASS in JOB.
USER user

A SYSOUT data set is to be routed to the specified user ID. DEST is required to specify a user’s node.

WRITER name

The name of an installation-written system output printing routine. The JCL analogy is the second subparameter in SYSOUT. Is incompatible with USER.

In addition to the shown fixed abbreviations and synonyms, keywords may be abbreviated up to the unique truncation. Those abbreviations are not fixed and may be changed when new keywords are added. They may be used interactively to save some keystrokes, but when a command is saved in a file, it is recommended that you use unabbreviated keywords.

Examples:

Allocate an existing data set:

DYNAM ALLOC DD MYDD DS MYID.DATA.SET SHR REU

Allocate a new data set. Defaults are NEW, CATALOG (dsname present), and DSORG PO (non-zero DIR present):

DYNAM ALLOC DD MYDD DS MYID.DATA.SET SPACE 6,2 TRACKS DIR 4 UNIT SYSDA - RECFM FB LRECL 80 BLKSIZE 1600

Allocate a terminal:

DYNAM ALLOC DD MYDD DS *

Allocate a SYSOUT data set with default output class. Upon freeing, the data set is sent to the user ID U1234 at node SYSVM:

DYNAM ALLOC DD MYDD SYSOUT * DEST SYSVM.U1234

The CONCAT Subcommand

The DYNAM CONCAT command concatenates up to 16 data sets.

**Syntax:** How to Use the CONCAT Subcommand

DYNAM CONCAT [PERM] DDNAME ddname1 ddname2 [ddname3...]

where:

CONCAT

Can be abbreviated as CONC.
PERM

Is optional. This marks the concatenation as permanent—that is, protected from being freed or concatenated again by any DYNAM command issued by an MSO user. Valid only in an MSO server initialization profile.

DDNAME DDN DD

Are required; synonym is FILENAME.

ddname1

Is the first ddname to be concatenated and associated with the resulting concatenated group.

ddname2

Is the second ddname and any subsequent ddname to be concatenated.

For example:

DYNAM CONCAT DDN EDARPC MYEX NEWEX

The FREE Subcommand

The DYNAM FREE command deallocates any number of specified data sets.

Syntax: How to Use the FREE Subcommand

DYNAM FREE {DDNAME ddname [ddname...]|DSNAME dsname [dsname...]}

where:

DDNAME DDN DD

Are required if there is no dsname; synonym is FILENAME.

ddname

Is the ddname of the data set to be freed.

DSNAME DSN DS

Are required if there is no ddname; the synonym is DATASET.

dsname

Is the name of the data set to be freed. All ddnames associated with this dsname, except concatenated groups, are deallocated.
While at least one ddname or data set name is required, you may specify more than one ddname or data set name. Each specified name may contain asterisks (*) and question marks (?) as wildcards. Wildcards are special characters used to specify a subset of names rather than one name. The wildcards appear anywhere in a name and mean the following:

*  
  Represents any number of characters. For example, *Q* matches any name containing the character Q.

?  
  Represents any single character. For example, ?Q? matches any 3-character name containing the character Q in the middle.

If the ddname is not found, a message is issued only if a single ddname without wildcards is specified. A message is not displayed if a data set or more than one ddname is not found.

**Examples:**

```
DYNAM FREE DDN SYS0* TEMP?
DYNAM FREE DSN MYID.DATA.SET
```

**The CLOSE Subcommand**

The DYNAM CLOSE command closes data sets that cannot be freed because they are opened.

**Syntax:**

```
DYNAM CLOSE  {DDNAME ddname [ddname...] | DSNAME dsname [dsname...]}  
```

where:

- **CLOSE**
  
  Can be abbreviated as CLO.

- **DDNAME DDN DD**

  Are required if there is no dsname; the synonym is FILENAME.

- **ddname**

  Is the ddname of the data set to be closed.

- **DSNAME DSN DS**

  Are required if there is no ddname; the synonym is DATASET.
Is the name of the data set to be closed. All ddnames associated with this dsname, except concatenated groups, are closed.

While at least one ddname or data set name is required, more than one ddname or data set name may be specified. Each specified name may contain wildcard characters. The same rules apply to the DYNAM CLOSE command as to the DYNAM FREE command.

The COPY Subcommand

The DYNAM COPY command copies an entire MVS data set or selected PDS members.

**Syntax:**

```
DYNAM COPY  dname1  [[TO]  dname2  [[MEMBER]  members]  |  [MEMBER]  members]  ]
[options]
```

where:

- **dname1**
  
  Is the dsname or ddname of the input data set. This is a positional parameter. It must precede all other operands.

- **TO**
  
  May be omitted if dname2 does not match a reserved word, the MEMBER keyword, an option, or the TO keyword. To avoid confusion, use the TO keyword whenever dname2 is a ddname.

- **dname2**
  
  Is the dsname or ddname of the output data set. If the output data set is not a PDS and the dsname is specified, it is allocated as OLD. If the ddname is specified, and the status is SHR, ensure that other users do not access the data set during COPY. Unlike ISPF, DYNAM locks a non-PDS data set in order to prevent simultaneous updating by different DYNAM users.

- **MEMBER**
  
  May be omitted if members are specified in parentheses.

- **members**
  
  Can be a single member specification or a list of member specifications. If the members are enclosed in parentheses, blanks before the left parenthesis may be omitted.
options

May be one or more of the following options:

**APPEND** adds the input to the end of the existing data, if the output is a sequential data set.

**FORCE** copies input DCB attributes (RECFM, BLKSIZE, LRECL, and KEYLEN) to the output data set. By default, only missing values are assigned.

**KEYMOD** allows key modification according to input/output KEYLEN: truncation or padding with binary zeros.

**REPLACE** replaces all output members matching the selected member names.

**TRUNCATE** allows truncation of input records that are longer than the output record length. Since trailing blanks are truncated automatically when RECFM is different, the keyword is used either to cut records of the same format or to cut non-blank data.

A member specification has the following syntax

```
mem[, [newmem][,REPLACE]]
```

where:

**mem**

Is the selected member name.

**newmem**

Is the optional new name for the output member.

**REPLACE**

Is optional and specifies an existing member to be replaced in the output PDS.

Since the comma may be used in member specifications, they are separated with one or more blanks when specified in a list. Therefore, a list of member specifications is always enclosed in parentheses. For example:

```
(MEM MEM, NEWMEM MEM, NEWMEM, R MEM, , R)
```

**Note:**

- All conversions between different DCB attributes (RECFM, BLKSIZE, and LRECL) are performed automatically.
If the entire PDS is copied or any selected member's directory entry contains a TTRN in user data (for example, a load module), the IBM utility IEBCOPY is invoked. In this case, all options except REPLACE are ignored, format conversion is not possible, and copying members to the same PDS is not supported.

If the main member and its alias names are copied, the relationship remains the same on the output PDS.

If a specified ddname has been allocated with a member name, the data set is treated as sequential.

**Examples:**

Copies the entire data set, whether it is a PDS or not.

```
DYNAM COPY MYDD MYID.DATA.SET
```

All four commands are equivalent. Either input or output may be a sequential data set, or both are PDSs.

```
DYNAM COPY MYDD MYID.DATA.SET MEMBER MEM
DYNAM COPY MYDD MYID.DATA.SET (MEM)
DYNAM COPY MYDD (MEM) MYID.DATA.SET
DYNAM COPY MYDD MEMBER MEM MYID.DATA.SET
```

Copies and renames one member.

```
DYNAM COPY MYID.DATA.LIB TO MYDD (MEM1, MEM2)
```

Copies two members.

```
DYNAM COPY MYID.DATA.LIB TO MYDD (MEM1 MEM2)
```

Copies two members into same PDS with renaming.

```
DYNAM COPY MYDD (OLD1, NEW1, R OLD2, NEW2)
DYNAM COPY MYDD (OLD1, NEW1 OLD2, NEW2) REPL
```

**The COPYDD Subcommand**

The DYNAM COPYDD command copies a sequential data set or PDS member.

**Syntax:**

```
DYNAM COPYDD ddname1 [(mem1)] ddname2 [(mem2)]
```

How to Use the COPYDD Subcommand
where:

\textit{ddname}1

Is the ddname of the input data set.

\textit{mem}1

Is optional. It is the input member name.

\textit{ddname}2

Is the ddname of the output data set.

\textit{mem}2

Is optional. It is the output member name.

\textbf{Note:}

- If the specified ddname has been allocated with a member name, the data set is treated as sequential.
- Identically named members are always replaced on the output PDS.
- All conversions between different DCB attributes (RECFM, BLKSIZE, and LRECL) are performed automatically.
- Since the DYNAM COPY command has more features than COPYDD, it is recommended that you use COPY instead of COPYDD.

\textbf{The DELETE Subcommand}

The DYNAM DELETE command deletes an entire MVS data set or selected PDS members.

\textbf{Syntax:}

\textbf{How to Use the DELETE Subcommand}

\texttt{DYNAM DELETE \textit{dsname}}

To delete individual members, use

\texttt{DYNAM DELETE \textit{dname [MEMBER] members}}

where:

\texttt{DELETE}

Can be abbreviated as \texttt{DEL}.

\textit{dsname}

Is the data set name to be deleted and uncataloged.
**dname**

Is the dsname or ddname of a PDS containing one or more members to be deleted. The ISPF-like lock is obtained.

**MEMBER**

May be omitted if the members are specified in parentheses.

**members**

Can be a single member name or a list of members. If the members are enclosed in parentheses, blanks before the left parenthesis can be omitted.

**Examples:**

```
DYNAM DELETE MYID.DATA.OLD
DYNAM DEL MYID.DATA.LIB MEMBER OLD1,OLD2
DYNAM DELETE MYDD(OLD1,OLD2)
DYNAM DEL MYDD(OLD1 OLD2 OLD3)
```

**The RENAME Subcommand**

The DYNAM RENAME command renames an entire MVS data set or selected PDS members.

**Syntax:**

```
DYNAM RENAME dsname1 dsname2
```

To rename individual members, use

```
DYNAM RENAME dname [MEMBER] members [REPLACE]
```

where:

**RENAME**

Can be abbreviated as REN.

**dsname1**

Is the data set name to be renamed and uncataloged.

**dsname2**

Is the new name to be assigned to the data set and cataloged.

**dname**

Is the dsname or ddname of a PDS containing one or more members to be renamed. The ISPF-like lock is obtained.
MEMBER

May be omitted if the members are specified in parentheses.

members

Can be a single member specification or a list of members. If the members are enclosed in parentheses, blanks before the left parenthesis can be omitted.

REPLACE

Is optional. This replaces all members matching the specified new names.

A member specification has the following syntax

\[ \text{oldmem, newmem[, REPLACE]} \]

where:

\text{oldmem}

Is the original member name.

\text{newmem}

Is the new member name.

REPLACE

Is optional and replaces existing members with the same name as \text{newmem}.

Since the comma is used in member specifications, each pair of members is separated with one or more blanks when specified in a list; therefore, a list of member specifications is always enclosed in parentheses.

Examples:

\[
\text{DYNAM RENAME MYID.DATA.OLD MYID.DATA.NEW}
\text{DYNAM REN MYID.DATA.LIB MEMBER OLD,NEW,R}
\text{DYNAM RENAME MYDD(OLD1,NEW1,R OLD2,NEW2)}
\text{DYNAM REN MYDD(OLD1,NEW1 OLD2,NEW2) REPL}
\]

The SUBMIT Subcommand

The DYNAM SUBMIT command submits jobs to MVS.

The ddname for DYNAM SUBMIT is normally allocated using a DYNAM ALLOC command. On HFS-deployed servers, if a DYNAM ALLOC is not found for the ddname, DYNAM SUBMIT will check whether a FILEDEF was issued for the ddname.
**Syntax:** How to Use the SUBMIT Subcommand

DYNAM SUBMIT dname [MEMBER(members)]

where:

SUBMIT

Can be abbreviated as SUB.

dname

Is the dsname or ddname of the input data set(s) containing JCL to be submitted. The ddname specifies a concatenation of data sets.

MEMBER

May be omitted if the members are specified in parentheses.

members

May be a single member name or a list of members. When a member list is submitted, the resulting job stream is the concatenation of the members. If the members are enclosed in parentheses, blanks before the left parenthesis can be omitted.

**Examples:**

DYNAM SUBMIT MYDD MEMBER ASM,PROG,LKED
DYNAM SUB MYDD(ASM,PROG,LKED)
DYNAM SUB MYID.DATA.LIB(CREATE LOAD)
DYNAM SUBMIT MYFILE

**The COMPRESS Subcommand**

The DYNAM COMPRESS command compresses the partitioned data sets (PDS).

**Syntax:** How to Use the COMPRESS Subcommand

DYNAM COMPRESS dname [dname]...

where:

COMPRESS

Can be abbreviated as COMP.

dname

Is the dsname or ddname of a PDS to be compressed. The ISPF-like lock is obtained.

If the dsname is specified, it is allocated as OLD. If the ddname is specified and status is SHR, make sure that another user does not access the PDS during the compress operation.
Examples:

DYNAM COMPRESS MYDD
DYNAM COMPRESS MYID.DATA.LIB
DYNAM COMP MYDD MYID.DATA.LIB

Comparison of TSO Commands, JCL, and DYNAM

This section shows examples of TSO commands and JCL, compared to the equivalent DYNAM commands.

Example: Allocating an Existing File

<table>
<thead>
<tr>
<th>TSO:</th>
<th>TSO ALLOC F(EDARPC) DA('MYUSER.EDARPC.DATA') SHR</th>
</tr>
</thead>
<tbody>
<tr>
<td>JCL:</td>
<td>//EDARPC DD DSN=MYUSER.EDARPC.DATA,DISP=SHR</td>
</tr>
<tr>
<td>DYNAM:</td>
<td>DYNAM ALLOC FILE EDARPC DA MYUSER.EDARPC.DATA SHR</td>
</tr>
</tbody>
</table>

Example: Creating a New Data Set

<table>
<thead>
<tr>
<th>TSO:</th>
<th>TSO ALLOC F(EDARPC) DA('MYUSER.EDARPC.DATA')- SPACE(5,3) TRACKS CATALOG DIR(2) - UNIT(SYSDA) USING(NEWDCB) - LRECL(80) RECFM(F B) BLKSIZE(1600)</th>
</tr>
</thead>
<tbody>
<tr>
<td>JCL:</td>
<td>//EDARPC DD DSN=MYUSER.EDARPC.DATA,DISP=(NEW,CATLG), // SPACE=(TRK,(5,3,2)),UNIT=SYSDA, // CB=(LRECL=80,RECFM=FB,BLKSIZE=1600)</td>
</tr>
<tr>
<td>DYNAM:</td>
<td>DYNAM ALLOC FILE EDARPC DA MYUSER.EDARPC.DATA - SPACE 5,3 TRACKS CATLG DIR 2UNIT SYSDA - LRECL 80 RECFM FB BLKSIZE 1600</td>
</tr>
</tbody>
</table>

Example: Freeing Files

| TSO: | TSO FREE F(EDARPC) |
DYNAM:

| DYNAM FREE FILE EDARPC |

**Example:** Concatenating Files

| TSO: | TSO ALLOC F(EDARPC) DA('MYUSER.EDARPC.DATA'-'MYUSER.PROGRAMS.DATA') SHR |
| JCL: | //EDARPC DD DSN=MYUSER.EDARPC.DATA,DISP=SHR  |
|      | // DD DSN=MYUSER.PROGRAMS.DATA,DISP=SHR |
| DYNAM: | DYNAM ALLOC FILE EDARPC DA MYUSER.EDARPC.DATA SHR  |
|      | DYNAM ALLOC FILE PROGRAMS DA MYUSER.PROGRAMS.DATA SHR  |
|      | DYNAM CONCAT FILE EDARPC PROGRAMS |

**FILEDEF Command Under UNIX, Windows, IBM i, z/OS, and OpenVMS**

A logical name (or ddname) is a shorthand name that points to the physical file name as the operating system actually knows the file. Logical names simplify code by allowing short names to be used in place of the longer physical file name.

The FILEDEF command assigns a logical name (or ddname) to a physical file name and specifies file attributes. FILEDEF assignments are in effect for the duration of a connection (except when a server is running in Pool Mode). They are released when the connection to the server is closed or a FILEDEF CLEAR is issued.

FILEDEF with the device name PRINTER is used in conjunction with OFFLINE requests to control printing attributes (such as the printer assignment and number of copies), and is further detailed in *How to Use the FILEDEF Command in UNIX, Windows, IBM i, z/OS, and OpenVMS* on page 470.

**Syntax:**

*How to Use the FILEDEF Command in UNIX, Windows, IBM i, z/OS, and OpenVMS*

```
FILEDEF ddname devicetype fileid [[LRECL n] [RECFM fm] [APPEND]]
```

or

```
FILEDEF ddname DISK app/[appa...] physfile.ftm
```

```
FILEDEF ddname CLEAR
```
where:

**ddname**

Is the logical name. It may contain 1 to 8 alphanumeric characters.

**devicetype**

Identifies the type of device with which to interact. Specifies DISK for a file that resides on disk. Other device types are PRINTER, TRMIN, and TRMOUT, which have special meanings and options. For more information, see Other FILEDEF Features on page 472.

**CLEAR**

Clears the specified ddname.

**app/[appa...]**

Is an application name (APP form of FILEDEF). It can be a nested application name.

**physfile.ftm**

Is a physical file located in the application (APP form of FILEDEF).

**fileid**

Is the physical full path name of the file as it is known on the particular operating system, using the native style of that operating system (non APP form of FILEDEF).

For instance, for Windows:

```
c:\mydir\myfile.dat
\\mymachine\mydir\myfile.dat
```

For UNIX, z/OS, and IBM i IFS:

```
/home/myhome/mydir/mtfile.dat
```

For OpenVMS:

```
DISK$MYDISK:[MYHOME.MYDIR]MYFILE.DAT
```

For IBM i QSYS:

```
QSYS:MYLIB/MYFILE
QSYS:MYLIB/MYFILE (MYMEMB)
```
On UNIX, z/OS, and IBM i IFS file systems, where file names are case-sensitive and lowercase file names are the norm and are expected for the product, appropriate lowercase names should be used when coding the file name. The use of relative file names for server use is not supported, as they are easily confused on some platforms as APP names. The use of an APP MAP command and APP-based naming will let you simulate relative names, yet also be portable to other platforms by simply adjusting the MAP value.

To support physical directory (or file) names with embedded blanks (common on Windows, but also possible on some other operating systems), the complete fileid must be enclosed in single quotation marks. In most instances, a physical operating system name has a unique characteristic that can be used to detect if a physical name is being used so it will not be confused with an APP name. However, IBM i native library names are not always unique enough, so they require an explicit prefix (QSYS:) to ensure proper access.

**Note:** APP usage can handle any number of directories below APPROOT when nested applications are on (internal default or when edaserver.cfg has `nested_app=y`). APP usage is limited to the number of directory levels allowed by the nested_app configuration of a server. Any other usage is not permitted.

**LRECL**  \( n \)

Specifies the record length, \( n \), in bytes. This parameter is optional. If you omit it, the default is 80 bytes. Note that the left parenthesis preceding the optional parameters is required.

**RECFM**  \( fm \)

Describes the record format. Specifies F for fixed format, V for variable format. This parameter is optional. If you omit it, the default is fixed format. Note that the left parenthesis preceding the optional parameters is required.

**APPEND**

Enables you to open the specified file and add new material at the end of the file. This parameter is optional. If you omit it and the specified file exists, it will be overwritten. Note that the left parenthesis preceding the optional parameters is required.

Note that FOCUS data sources (files with the .foc extension) that do not conform to the default naming conventions are identified using the USE command, not FILEDEF.

**Other FILEDEF Features**

PRINTER as a device type is used to change the default output file for the OFFLINE print file or set output destinations. For more information, see *Sending Stored Procedure Report Output to Server-Side Printers* on page 398.
FILEDEF TRMIN TERM LOWER is used to change the uppercasing behavior of an interactive session (edastart -t) into case sensitive mode. FILEDEF TRMIN TERM UP is used to restore default behavior. Interactive session mode is typically used for testing and is not considered a production feature for general use.

FILEDEF TRMOUT DISK fileid is used to capture session output into a file and is only valid during an interactive session (edastart -t).

FILEDEF TRMOUT TERM is used to restore default behavior after a change to DISK. Interactive session mode is typically used for testing and is not considered a production feature for general use.

For information about FILEDEF OFFLINE PRINTER, see Sending Stored Procedure Report Output to Server-Side Printers on page 398.

While command input lines (interactively or in a FOCEXEC) are effectively unlimited, this was not always the case. A feature of FILEDEF to deal with usually long directory/file names and this former limitation was the ability to split the FILEDEF command across several lines. This was done by using a dash (-) after a FILEDEF token to indicate continuation on the next line. While this feature is not needed anymore, it remains a feature for upward compatibility purposes and is documented here as a deprecated feature.

**Server Side OFFLINE Printing**

Server side printing of formatted reports is accomplished using the OFFLINE command, which sets up and issues a default OFFLINE FILEDEF (or DYNAM ALLOC on z/OS PDS deployment) to receive the formatted outputs after an OFFLINE CLOSE is issued.

The following example on UNIX (and Linux) creates an offline.ftm file and calls lp, the default print command for UNIX (and Linux). On other platforms an equivalent print command is issued:

```
OFFLINE
TABLE FILE CAR
PRINT COUNTRY
END
OFFLINE CLOSE
```

There may be one or more outputs buffered to the same output file for printing, but they are not released to the file until an OFFLINE CLOSE is issued. If a system level variable for FOCPRINT is available at OFFLINE CLOSE time, it will be used to attempt printing of the actual file.
The FILEDEF (or DYNAM ALLOC on z/OS PDS Deployment) OFFLINE PRINTER device feature allows the additional specification of output destinations and, in some cases, additional operating system print command switches for features such as multiple copies. In this way, a request can be customized to the print requirements of a particular site.

Prior behavior was that if the operating system variable FOCPRINT was declared (with an operating system command and a $1), it would be called to take an action on the file name which also replaced the $1 in the string.

The enhanced FILEDEF command is:

```
FILEDEF OFFLINE PRINTER [filename] [ ( PRINTER printername )]
```

The printer name option is used with the standard print feature of a given platform. If no printer name is declared or is set to blank, then the offline file is created, but the print feature is not called. Since printing is platform specific, each platform is described here individually, however, there are still some common needs that are sometimes best resolved by creating a layer that can act as a proxy between the server and the print system.

**UNIX and z/OS HFS Deployment**

The printer name is dropped in as the "-d" switch value in the "lp -c -d" command. The "-c" switch is used to avoid over-writing of the offline file before actual printing has occurred. If additional lp switches are desired (like multiple copies with the -n switch), they may be stacked into the name by enclosing the string in single quotation marks:

```
FILEDEF OFFLINE PRINTER ( PRINTER '29d1 -n 2'
```

If a site uses lpr instead of lp, then an lp shell script can be created in the $PATH before the standard lp command and can act as a proxy to call lpr instead. The lp script could be as simple as "/usr/bin/lpr $*" to redirect lp to lpr.

**Note:** On z/OS HFS Deployment, the file is spooled to the system and actual disposition will depend on the configuration of the printer spool.

**z/OS PDS Deployment**

A DYNAM ALLOC command for OFFLINE is used to specify spooling attributes.
OpenVMS

The printer name is dropped in as the "/QUEUE=" switch value in the "PRINT/QUEUE=" command. OpenVMS always makes a copy of the file to be printed so it does not have an overwriting the offline file problem. If additional PRINT switches are desired (like multiple copies with /COPIES= switch) they may be stacked into the name by enclosing the string in single quotation marks:

```
FILEDEF OFFLINE PRINTER ( PRINTER '29d1 /COPIES=2'
```

Sites rarely use anything but the standard PRINT command, but can be also proxied if necessary by creating an alternate printer command at the OS level or queue / symbiont that routes to the alternate method.

Windows

The printer name is a shared printer name and is used to set up (and later drop a NET USE for the LPT1 device to a shared name (for example, \nodename\myprinter), which is then used in a PRINT /D:LPT1 command to print the actual file. As such, additional switch options cannot be done and use of a PRINT.BAT as a proxy is the only method for further manipulation of the output.

IBM i

**Note:** IBM i was formerly known as i5/OS.

The output is always spooled from the offline file to the print spool using the system QPRINT file (with whatever the standard values are) on the server’s library list. If the spool is set to directly print, output will always be routed as directed with no declaration of a printer name using FILEDEF. If output is not automatically routed and a printer name (using FILEDEF) is declared, then a CHGSPLFA command will be issued with the printer name as the OUTQ() value to direct the spool file to a destination. If additional CHGSPLFA parameters are desired (such as multiple copies with the COPIES() parameter), they may be stacked into the name by enclosing the string in single quotation marks:

```
FILEDEF OFFLINE PRINTER ( PRINTER '29d1 COPIES(2)' 
```

A user can also set a specific IBM i QPRINT file to use (which may have attributes such as number of copies set within it) for spooled OFFLINE print files by either placing an appropriate QPRINT file (explicitly named QPRINT) on the server library path or issuing a SET command to use an explicit QPRINT file (of any name). Additionally, you may set a spool file SPLUSRDTA attribute (10-character limited string) to assist in identifying outputs. When set, the print spool job will pick up the attribute information and be displayed by the native operating system tools like DSPLSPLF and WRKDSPLF.
The commands are:

```plaintext
SET I5QPRINT = [(library/,\{qprintfile\)]
```

and

```plaintext
SET I5SPLUSRDTA = string
```

The internal default for I5QPRINT is QPRINT and may be set to any valid CRTPRTF-created QPRINT file. The QPRINT file and its attributes must be appropriate for the type of file that the OFFLINE command produces (paged plain text) and the capabilities of the actual print device. If no library is supplied, the *LIBL value of the job will be used to locate the file.

Setting I5QPRINT or I5SPLUSRDTA with no value to the right of the equal sign has no effect and leaves the current value unchanged.

Use SET I5SPLUSRDTA = ' ' to set I5SPLUSRDTA explicitly back to no value (blank). Also use single quotation marks for values with embedded spaces.

An I5QPRINT value of blank is illegal for the i5 spool system, so a value of ' ' defaults to QPRINT.

Note that the CRTPRTF command for creating printer attribute files does not create a default QPRINT that matches the IBM-delivered standard default that is in QGPL. To create a QPRINT with standard IBM-delivered default values use:

```plaintext
CRTPRTF FILE(*CURLIB/QPRINT) RPLUNPRT(*NO) CHRID(*CHRIDCTL)
```

Then make any site-specific changes and change the owner attribute rights from *ALL to *CHANGE (to prevent over-writing) with:

```plaintext
EDTOBJAUT OBJ(*CURLIB/QPRINT) OBJTYPE(*FILE)
```

The use of an lp script on IBM i as a proxy is not effective because lp is not used. The use of alternate QPRINT files is the closest equivalent to an lp proxy.

**OFFLINE to DISK Versus PRINTER**

The "‘PRINTER printernname" feature is only valid when the FILEDEF device is PRINTER. There is, however, a difference between the use of DISK versus PRINTER as a device in a FILEDEF for OFFLINE. When the device DISK is used, page breaks are represented by a 1 in the first column of a given line where a page break is to occur. This is the FORTRAN Carriage Control method of page control and is a vestige of the product’s original mainframe roots. When the disk device is PRINTER, the more modern, Control L (^L / Decimal 12 / Hex 0C) form feed method is used.
Other Printing Information

Very often, sophisticated laser based printers are "hung" off networks and communicated with various print protocols. While these printers may come from many manufactures, a very common (but not standard) attribute of these types of printers is automatic sensing between a plain clear text file being sent to the printer and a postscript file that contains printer attribute commands as well as the text to print.

OFFLINE files are plain text (vs. HOLD FORMAT PS which do not get spooled using OFFLINE, and it is up to the user to direct them to a printer). Very often, these sophisticated printers can be set up or used improperly, causing a printer to think a plain text file is postscript when it is not, and yielding a page with a postscript error message. This has only been seen so far when printing from Windows, but is in theory possible from any platform.

This problem is not considered to be a server issue because the software is not directly manipulating these printers and uses standard commands supplied by the OS vendor for printing. Generally, this problem can also be reproduced using standard print tools stand-alone from the server environment. A systems administrator for a printer exhibiting an issue like this should be able to track down why this happens in any given environment and take corrective action.

An improper spooling issue may typically also be corrected by creating a proxy script to inject a leading character into the output that resets the printer, so the remaining output properly prints. Generally, this is a control D, but may vary by printer make and model and, as such, specific implementation of such a proxy script is left to the customer since specific needs may vary greatly by site and the various printer models that are available.

Stress Testing a Procedure

Stress testing enables you to simulate request execution in order to ensure that the server will retrieve data satisfactorily under specified conditions.

The mechanism behind stress testing is a record and playback feature in which the exact sequence of user actions applied through a browser are recorded and then reproduced (played back), simulating a single user or multiple users under the same or different conditions. You can use the generated files and the recorded sequences, known as HTI scripts, along with server traces, to test new configurations, and to diagnose problems.

From the Web Console Playback of HTI Scripts pane, you can initiate test runs under the following separate and combined conditions:

- Requests run simultaneously by a number of users (expressed as threads). You can retest using a variety of scenarios. This features enables you to determine in advance the system ability to grow (that is, its scalability).
Requests executed at varying intervals. This feature enables you to determine in advance the ability of the system to adjust to increases in workload.

In addition to these basic tests, you can specify a number of advanced conditions to refine the diagnostic process. For example, stress testing generally provides information about the retrieval performance of the Reporting Server going against one or more data sources (also called back end processing). If, however, you are working in a client environment like WebFOCUS, you may wish to test data retrieval performance beginning at a user browser, going through a Web server (front end processing), to the Reporting Server to the data source. You can request that the test be redirected to the Web server to track retrieval over the longer path. Then, by comparing back end test results with front end test results, you can more accurately diagnose the origin of a performance problem based on any other conditions you specify.

For a full list of the basic and advanced stress test conditions you can apply, see Parameters for Playback of HTI Script Files on page 679.

Recording User Actions Into a Script Using Run Stress

The server recording feature can record the exact sequence of user actions applied through a browser into a script. The script can then reproduce that sequence (play it back), simulating single or multiple users under varying conditions to produce execution statistics.

The Run Stress feature uses an existing procedure to produce the script. It also changes the browser session to the Diagnostics Scalability Playback Start/Stop page for the script.

The files used by playback and the recorded sequences are known as HTI scripts and are saved in the scalability directory. The scripts can be used along with server traces for problem diagnostics, analysis and testing.

One may go back to the Diagnostics Scalability Playback page at any time off the main menu and create a new script by recording a session activity (top menu bar) or an edit session (top menu bar) plus edit or re-run an existing script.

Procedure: How to Run a Stress Test

You can run a stress test on a procedure from the Web Console.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a procedure, select Run Advanced, and then Run Stress.
The Playback of HTI Script Files page opens.

4. Enter basic test conditions: Number of Threads, Interval Parameter, and a Test Description. Click Advanced if you wish to specify additional conditions.

5. Click Start. Results are displayed in a separate window. For an illustration, see Sample Stress Test Log on page 480.

The script is listed under the tested procedure in the directory C:\ibi\scale.

6. Open the Performance Reports folder on the Playback navigation pane and choose:

- Basic Report
- Extended Report
- Graph Report

Select View to view the report or Open to see the report or the Metadata, Query, and Output panes for the report.
**Example:** Sample Stress Test Log

--- Started at 12:57:32 ---
Received: thread=01 request=0001; timing: resp=0.062 sec, transf=0.000 sec, start=06/29/2005 12:57:32
--- Finished at 12:57:32 ---

Total Execution Time: 0.094 sec
Total Number of Requests: 1
Total Number of Threads: 1
Interval Parameters: 500,-1,-1
Average Server Response: 0.062 sec
Average Data Transfer Time: 0.000 sec
Average Request Processing Time: 0.062 sec
Standard Processing Deviation: 0.000 sec
Minimum Processing Time: 0.062 sec
Maximum Processing Time: 0.062 sec
Average DBMS Time: 3.559 sec

terminating main thread

**Example:** Sample Performance Reports

**Basic Report**

<table>
<thead>
<tr>
<th>Test Name</th>
<th>Test Description 1</th>
<th>Begin Time</th>
<th>End Time</th>
<th>Total Time</th>
<th>Arrival Rate</th>
<th>Average Response Time</th>
<th>Average DBMS Time</th>
<th>Maximum Server Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ibisamp/t1xeny1</td>
<td></td>
<td>2017/04/26 17:12:43</td>
<td>2017/04/26 17:12:43</td>
<td>.123</td>
<td>120.000</td>
<td>.072</td>
<td>.000</td>
<td>.072</td>
</tr>
<tr>
<td>Ibisamp/t1xeny2</td>
<td></td>
<td>2017/04/26 17:13:37</td>
<td>2017/04/26 17:13:48</td>
<td>.0991</td>
<td>120.000</td>
<td>.113</td>
<td>.000</td>
<td>3.875</td>
</tr>
<tr>
<td>Ibisamp/1xeperson</td>
<td></td>
<td>2017/04/26 17:10:36</td>
<td>2017/04/26 17:10:46</td>
<td>9.921</td>
<td>120.000</td>
<td>.045</td>
<td>.000</td>
<td>.075</td>
</tr>
</tbody>
</table>

**Extended Report**

<table>
<thead>
<tr>
<th>Test Name</th>
<th>Test Description 1</th>
<th>Begin Time</th>
<th>End Time</th>
<th>Total Time</th>
<th>Arrival Rate</th>
<th>Total Number of Requests</th>
<th>Total Number of Threads</th>
<th>Interval Parameters</th>
<th>Average Response Time</th>
<th>Average DBMS Time</th>
<th>Maximum Server Time</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ibisamp/t1xeny1</td>
<td></td>
<td>2017/04/26 17:12:43</td>
<td>2017/04/26 17:12:43</td>
<td>.123</td>
<td>120.000</td>
<td>1</td>
<td>1</td>
<td>500, -1, -1</td>
<td>.072</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ibisamp/t1xeny2</td>
<td></td>
<td>2017/04/26 17:13:37</td>
<td>2017/04/26 17:13:48</td>
<td>.0991</td>
<td>120.000</td>
<td>244</td>
<td>3</td>
<td>500, -1, -1</td>
<td>.113</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ibisamp/1xeperson</td>
<td></td>
<td>2017/04/26 17:10:36</td>
<td>2017/04/26 17:10:46</td>
<td>9.921</td>
<td>120.000</td>
<td>211</td>
<td>1</td>
<td>500, -1, -1</td>
<td>.048</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Running Impact Analysis Reports

An Impact Analysis report enables you to determine the impact of changing a synonym, synonym column, procedure, or connection. The report shows you how and where the object is used. For example, running the report on a procedure tells you from which applications and procedures the original procedure is run. Running the report on a synonym tells you which tables or other data sources the synonym describes, and in which procedures it is referenced. This enables you to determine how changing the synonym, column, procedure, or connection could affect the rest of your application.

You can run Impact Analysis reports from the Web Console and from the Data Management Console. Reports also provide drill-down links so that you can, for example, run an Impact Analysis report on a synonym, see a procedure listed in the report, and click the procedure to edit it.

In addition to the reports you can run for an individual procedure, synonym, connection, or column, you can select the following standard Impact Analysis reports for an Application folder in the Web Console or the Data Management Console:

- **The Synonyms by Procedure** report lists your procedures and the synonyms that they use, sorted by procedure. The report includes whether the synonym is used as a source or a target, the adapter type, the table name and description, load type and prior to load options, and directory locations.
The Procedures by Synonym report lists your synonyms and the procedures they are used in, sorted by synonym. The report includes whether the synonym is used as a source or a target, the adapter type, the table name and description, load type and prior to load options, and directory locations.

The Columns by Procedure report lists the columns used in your procedures and their synonyms sorted by data flow. The report includes how the column is used, as well as directory locations.

The Procedures by Column report lists your procedures and their synonyms sorted by column. The report includes how the column is used, as well as directory locations.

The Synonyms by Procedure for Enterprise report includes the same information as a Synonyms by Procedure report, but for the server and all its subservers in a hub/subserver environment. This report does not appear if the server you are reporting on does not have any remote servers configured.

The Procedures by Synonym for Enterprise report includes the same information as a Procedure by Synonym report, but for the server and all its subservers in a hub/subserver environment. This report does not appear if the server you are reporting on does not have any remote server configured.

The Flow Report reports has two options, Summary and Detailed, which report on existing flows.

Note: Enterprise reports appear only if you have subservers.

**Procedure:** How to Run an Impact Analysis Report for an Application

You can run an Impact Analysis Report from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Right-click an application folder, select Impact Analysis, and then either:

   - Synonyms by Procedure
   - Procedures by Synonym
   - Columns by Procedure
   - Procedures by Column
   - Flow Report
The Impact Analysis report opens in the right pane.

**Procedure:** How to Run an Impact Analysis Report for an Adapter Connection

You can run an Impact Analysis Report from the Web Console or the DMC.

1. From the Web Console menu bar, click Adapters, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Adapters page opens.

2. Expand an adapter folder.

3. Right-click a connection, and select Impact Analysis.

   A report similar to the following image opens in the right pane. The report provides links to the files and lists such information as the connection names, type of file, usage, and application name.

   ![Impact Analysis Report](image)

**Procedure:** How to Run an Impact Analysis Report for a Procedure

You can run an Impact Analysis Report from the Web Console or the DMC.

1. From the Web Console menu bar, click Applications, or from the Data Management Console, expand the Server node folder.

   On the Web Console, the Applications page opens.
2. Expand an application folder.
3. Right-click a procedure, and select *Impact Analysis*.

The Impact Analysis report opens in the right pane.

**Procedure:** How to Run an Impact Analysis Report for a Synonym

You can run an Impact Analysis Report from the Web Console or the DMC.

1. From the Web Console menu bar, click *Applications*, or from the Data Management Console, expand the Server node folder.
   
   On the Web Console, the Applications page opens.

2. Expand an application folder.

3. Right-click a synonym, and select *Impact Analysis*.

The Impact Analysis report opens in the right pane.
Server Workspace Manager

The Web Console provides a variety of tools and techniques that you can use to run and monitor your server. The Workspace Manager is the controlling process that controls and oversees the various processes of the server.

In this chapter:

- Configuring Workspace Manager
- Workspace Configuration Settings
- Editing Configuration Files
- Configuring Java Services
- Cluster Manager
- Monitoring Server Activity

Configuring Workspace Manager

The Workspace Manager is the component of the Reporting Server that is responsible for managing all server administrative tasks. These tasks, generally performed by Server Administrators, include monitoring server activity, configuring and adjusting the server configuration profile, adding users, enabling and creating services, defining deferred execution characteristics, and enabling and disabling email alerts.

The Server Administrator responsible for the installation, configuration, security, and maintenance of the server uses the Web Console to manage and configure the Workspace Manager in order to keep the server available to clients and running at peak efficiency. To use the Web Console, open Internet Explorer and navigate to the HTTP port on the host machine where the Server is running, as in http://host:http_port.

Your Server must be running in order to use Web Console to access the Workspace Manager.

Tip: This chapter references a number of Workspace related keywords. Within the help system, you can access detailed information about these keywords by clicking the keyword links in this document. You can also click the question mark (?) icon next to parameters on the Workspace configuration panes.
Workspace Manager Configuration Privileges

Access to the administrative features of the Web Console can be restricted by defining a list of users with admin privileges and storing the list in a release-independent file called admin.cfg. This file is located, by default, in .../ibi/profiles.

The list of users and user roles defined in admin.cfg defines a list of administrators and users that can be used for authorization and/or authentication according to established security. Administrators are responsible for installing, configuring, and maintaining the Server with varying degrees of responsibility, depending on their administration levels (SRV, APP, OPR). At least one administrator must be defined in the list, although most sites identify other persons to act as backups.

For example, a Server Administrator (SRV) can perform all the administrative tasks available through Web Console operations. If more than one Server Administrator is defined, the first valid member on the list is used to impersonate FOCUS Database Server (FDS) and other special services. An Application Administrator (APP) is limited to the administrative tasks that do not require changing configuration or restarting the server. Both Server Administrators and Application Administrators can edit user profiles in the user.prf file. However, Server Administrators can edit all user.prf files, while Application Administrators can only edit their own profiles.

Any IDs (beyond the original ID used to configure the server) that are used for server or application administration require read/write privileges to the respective locations that the IDs are expected to manage. To assign these privileges, you must establish group rights for the locations at the operating system level. To view and run Resource Governor procedures, for example, IDs must be at least at the Application Administrator level.

Stop Server

A server administrator can stop the server. Existing connections are terminated.

Restart Server

A server administrator can restart the server. Existing connections are terminated, and new connections will be rejected until the server restarts.
Quiesce Server

A server administrator can change the server state to quiesce to disable new connections. Existing connections are not terminated, but will finish processing and disconnect, while new connections will be rejected. A server administrator can still connect to the server. This is done to gradually move the server to the state where maintenance can be performed safely or to collect diagnostic information. It can also be used as the first step before stopping the server without terminating any connections.

A server administrator can enter a custom message that will be displayed for a new user connection when the server is in Quiesce mode.

**Procedure:** How to Quiesce the Server and Set a Custom Message

Only a server administrator can change the server state. To Quiesce the server, and define a custom message that will be delivered from the server:

1. From the ribbon, click Quiesce.
   
   The Quiesce Connections page opens.

2. If you want to deliver a message for new user connections, enter it in the `quiesce_msg` field.

3. Click Submit.

   You will be asked if you want to disable new connections.
4. Click OK.

**Note:** To restore the server to normal operation, click the Console icon, and select *Enable New Connections*.

### Configuring an Agent Service

A server configuration requires at least one agent service with the name DEFAULT, defined by a SERVICE block. An agent service is an entity used to define the parameters for a group of data access agents, so that a configuration can manage different groups of data access agents for different purposes. Each data access agent runs for a specific Data Service, and each service may have different values for the settings defined on the services configuration panes. These settings include:

- The maximum number of data access agents and the number of agents prestarted at server startup for a service, as defined by *maximum* and *number ready*.

- The lifetime of the agents of a server, which can be limited through *idle agent limit*, *CPU time limit*, and/or *memory limit*.

- Incoming connections for which there is no available data access agent. These can be put in a queue for the service (configured using *maximum_q* and *queue limit*), and after they are connected, their idle time can be limited using *idle session limit*.

- The *deployment mode* of a service, which defines how data access agents are assigned to connections.

**Procedure:**  **How to View or Edit Data Service Properties**

The service agents are available from the Workspace folder.

1. From the menu bar, select *Workspace*.

2. In the navigation pane, open the *Data Services* folder.
3. In the navigation pane, right-click a Data Service and select *Properties*.

The properties page for the particular Data Service opens.

**Reference:**  Data Service Properties

The server includes four predefined Data Services:

- DEFAULT
- WC_DEFAULT
- SCHED_DEFAULT
- DFM_DEFAULT
The following image shows the parameters for the DEFAULT service.

![Data Service DEFAULT](image)

**Note:** Changing values with an asterisk (*) requires restarting the server.

Data Services have the following parameters:

- **service**
  Defines the name of the service.

- **maximum**
  Defines the maximum number of data access agents that the Workspace Manager will allow to run simultaneously for a specific service.
**number_ready**

Defines the number of data access agents that the Workspace Manager will create at startup for a specific service.

**deployment***

Controls resource sharing between users who are connecting to the same agent in this service. The values are:

- **private deployment.** All users are completely independent of each other and have their unique operating system rights, database connections, and FOCUS language settings.

- **connection_pooling.** All users are partially independent by having their own unique FOCUS language settings but sharing operating system rights and database connections.

**Queuing***

Controls whether queuing is on or off.

**maximum_q**

Defines the maximum number of connections that could be queued for a specific service. Only available when queuing is set to on. Set to -1 for an unlimited queue size.

**queue_limit**

Defines the amount of time in seconds a queued connection will wait before being timed out if an agent is still unavailable. A setting of -1 mean unlimited.

**idle_session_limit**

Defines the time limit in seconds that connected agents will wait for client input before they are disconnected. A setting of -1 mean unlimited.

**idle_agent_limit**

Defines the time limit in seconds that disconnected agents in excess of number_ready can stay idle before they are killed. A setting of -1 mean unlimited.

**profile***

Specifies a focexec file that will be executed during agent startup.

**cpu_limit**

Defines the amount of CPU time in seconds an agent is allowed to use before being killed by the Workspace Manager.
memory_limit

Defines the maximum amount of memory in kilobytes an agent is allowed to use. If an agent process grows above this limit, it will be killed by the Workspace Manager.

disk_limit

Defines the maximum amount of disk space in kilobytes an agent is allowed to use. This would add sizes of all files in agent edatemp directory, such as FOCSORT, HOLD files and other temporary files created by requests. If an agent process grows above this limit, it will be killed by the Workspace Manager.

connection_limit

Defines the time limit in seconds allowed for connection. When it is exceeded, the connection will be terminated, and the agent serving this connection will be stopped.

max_connections_per_user*

 Restricts the number of concurrent connections for the same userid for a specific service. When a user exceeds the maximum number allowed, additional connections requested by that user are rejected, and the server displays the message

Connection refused due to the max_connections_per_user (n) being exceeded

where n is the number of allowed connections.

You have the option to queue user connections that are refused by the server, using the queue_max_user_conns property on the Data Service Properties page. That option is available only if the Queuing property for the Data Service is On.

queue_max_user_conns

Enables queuing of concurrent connections for the same userid for a specific service in excess of max_connections_per_user. This setting allows new connections that would otherwise be rejected to be queued for later processing. Only available when queuing is set to on.

agent_refresh

Defines the maximum number of new connections which can be accepted during the life of each agent process. Beyond this limit, additional new connections will be assigned to a fresh agent. Agent processes which have reached the limit will be terminated when the last accepted session disconnects.
**sched_priority**

Defines the scheduling priority of each agent process running under the specified service entry. The scheduling priority of a process defines how the operating system scheduler treats the process after it gains control of the CPU, and should be set according to the relative importance of the work being done by the service. Values range from -20 (highest priority) to 20 (lowest priority).

**Reference:** How the Reporting Server Maintains the Number of Available Agents

The Reporting Server maintains the number of available agents using the number_ready parameter.

- The number_ready parameter will determine how many agents are started when the Reporting Server starts. However, it does not guarantee that the number of active agents will not fall below that value. The number of agents may be lower if agents crash or are stopped unexpectedly. Even if the number of active agents is lower than the number_ready parameter, more will be started as needed, up to the number allowed by the Maximum parameter.

- If there are active agents that are idle, and that number exceeds number_ready, agents will be stopped once they exceed the idle_agent_limit until the number of active agents equals the number_ready.

**Configuring Deployment Modes**

The *deployment mode* of a service defines how data access agents are assigned to connections:

- In private deployment, a dedicated application agent is assigned for each connection request. Private deployment retains the behavior of all prior server releases. At connect time, global, as well as user and *service level* profiles, are executed. At disconnect time, all temporary files are removed and database connections are closed. The privileges of each application agent depend on the security mode of the server.

  With security set to a value other than OFF, authentication is processed for every client logging on to the server. With security OFF, user identification and authentication are not required. The effective user ID becomes the connecting user for the duration of the session.

- In connection_pooled deployment, the global profile and service profiles are executed when an agent is started, and pooled user profiles are executed on each connection. The WebFOCUS context is cleared once the session is established for a new connection, and then the pooled user profile is executed.
With security set to a value other than OFF, all users have the same rights because the effective pooled user is unique, regardless of the connecting user.

Connection pooled deployment provides significant performance advantages and is recommended when a large number of users share the same operating system and DBMS credentials. It cannot be used when each connecting user has specific operating system and DBMS rights, nor can it be used for the service DEFAULT with the server security mode set to DBMS because, in this situation, the profile is disabled for connection authentication.

**Procedure: How to Set the Server Deployment Parameter in a Server Profile**

To set the server configuration parameter deployment:

1. From the menu bar, select *Workspace*.
2. In the navigation pane, right-click the *Data Services* folder, and select *New*.

   The New Data Service page opens.

   **Tip:** For an existing service (for example, DEFAULT, WC_DEFAULT, DMC_DEFAULT, DEFAULT_CPOOL), right-click the service and choose *Properties* from the menu to open the Services pane.

3. In the deployment field, choose *private* or *connection_pooling*.

   - With private deployment, all profiles are executed on connection. On disconnect, all DBMS connections are dropped. This is the default value.

     With security set to a value other than OFF, the effective user ID is switched to the connecting user for the duration of the connection.

     Skip to step 6.

   - With connection-pooled deployment, the global profile and service profiles are executed when an agent is started, and pooled user profiles are executed on each connection. The WebFOCUS context is cleared once the session is established for a new connection, and then the pooled user profile is executed.

     When you select this option, *pooled_user* and *pooled_password* are displayed.

     With security set to a value other than OFF, all users have the same rights because the effective user is unique (configured using pooled_user and pooled_password) regardless of the connecting user.

     Continue with steps 4 and 5.

4. Select the *pooled user* from the drop-down list. (This list is populated from the admin.cfg file described in *Workspace Manager Configuration Privileges* on page 486.)
This service level keyword is required for connection_pooling deployment with security mode OPSYS. It defines the user ID under which all agents will run. The DBMS user IDs are determined by the connection setting type.

5. Enter the corresponding password. Note that pooled password is only required for connection_pooling deployment on Windows operating systems.

6. Click the Save button.

**Workspace Configuration Settings**

You can set a variety of general parameters from the Workspace folder in the navigation pane. The parameters are available from a right-click menu and from buttons on the ribbon, organized under the following categories:

- **Settings**
  - **Event Routing**.
  - **Locale Settings**.
  - **Login Message**.
  - **Web Console Appearance**.
  - **Focus Sets and Info**.
  - **Workspace SET**.

- **License**
  - **License Settings**.
  - **Migrate Settings**.

These settings are saved in the appropriate configuration files.

**Tip:** If you prefer, you can edit these parameters directly in the associated configuration files. To do so, select Workspace from the menu bar. In the navigation pane, expand the **Configuration Files** folder, and choose the option that opens the file you wish to edit in a text editor. For details, see **Editing Configuration Files** on page 544.
You can monitor and troubleshoot server activity from the Workspace folder in the navigation pane. These functions are available from a right-click menu and from buttons on the ribbon, organized under the following categories:

- **Monitor**
  - Status. See *Monitoring Server Status* on page 559.
  - Data Service Agents. See *Displaying and Customizing a Data Service Agents Page* on page 561.
  - Data Service Statistics. See *Displaying Status Statistics and Aggregated Statistics for Data Services* on page 569.
  - Scheduler Agents. See *How to Display and Customize the Scheduler Agents Page* on page 617.
  - Web Sessions on page 601.
  - Live Console. See *How to Display the Live EDAPRINT Log File* on page 646.

- **Diagnostic**
  - Log and Trace. See *Analyzing Server Activity* on page 645 and *Tracing Server Activity* on page 656.

### Workspace SET

The Workspace SET button lets you configure SMTP Server settings, Profile settings, Application settings, and Miscellaneous settings.

### Reference: SMTP Server Settings

You can specify an IP address for the email server and a sender address. If the server is secured, you can specify the credentials for connecting to the server. You can also test your email connection from the E-mail Settings pane.

To access these settings, select Workspace from the menu bar or right-click the Workspace folder. Click the Workspace SET icon on the ribbon and select SMTP Server Settings.
The E-Mail SMTP Server page opens, as shown in the following image.

![E-Mail SMTP Server](image-url)

The following settings are saved in the odin.cfg file:

- **smtp_host**
  Indicates the IP address of the SMTP email server using the notation that is supported for your IP version (for example, for IPv4, use base 256 standard dot notation. When IPv6 is supported on a platform, and enabled, you can use either 256 standard dot notation or IPv6 notation.)

- **port**
  Indicates the TCP port number that a client is connecting to. The default value is 25.

- **smtp_user**
  Is the user ID to authorize access to the SMTP server.

- **smtp_password**
  Is the password for the smtp_user.

- **sender_email**
  Place each email address (id@domain.com), a user ID (myid) or a procedure name (%myfex) on a new line with no separators.
**sender_email**

Is the sender email address (the address that appears in the From field in emails).

**server_admin_email**

Is a list that can consist of email addresses, user IDs and procedure names (for example, %myfex.fex), each on a separate line, with no delimiters.

**Note:** If email send operations fail, verify that the smtp host is active and/or that a virus scanner is not blocking edachkup.

When you have completed your entries, optionally click the Send Test E-mail button to test your connection, then click Save.

**Reference: Profile Settings**

You can control aspects of profile execution from the Profile Settings pane.

To access these settings, select Workspace from the menu bar. From the ribbon, click the Workspace SET icon, and select Profile Settings, or right-click the Workspace folder in the navigation pane, and select Workspace SET, and then Profile Settings.

The Profile Settings pane opens, as shown in the following image.

![Profile Settings](image)

The following Profile Settings are saved in the edaserv.cfg file:

**profile_parameter**

By passing parameters to profiles, you can submit different session parameters at different connection times. When this parameter is activated, any unresolved variables are prompted for during your initial logon to the Web Console.

Available settings are **y** and **n**.

If the server, user, or group profiles contain any unresolved variables, set the profile parameter keyword to **y**. The default setting is **n**.
In the Windows Server, to control whether the domain name is included in or excluded from a user profile name, choose:

- **n** to add the domain name to the profile name (for example, user ibi/edaport becomes ibi_edaport.prf). N is the default value.
- **y** to omit the domain name from the profile name (for example, user ibi/edaport becomes edaport.prf). This setting is required for compatibility with earlier releases of the Server.

**Note:** The **y** setting can be safely employed if a single domain is in use and there are no local user IDs that could interfere with domain IDs. If there is potential for interference between local user IDs and domain IDs that are connected to the server, the **n** setting is required to ensure that each user has a unique profile name.

Note that server must be restarted when this parameter is changed.

When you have completed your entries, click **Save**.

**Reference:** Application Settings

When you want to be able to reuse data within the same browser session, you can store the data in the form of a HOLD, SAVE, or SAVB file in the foccache directory, which is automatically created when the connection to the server is established. This becomes the first directory in the application path.

As long as the browser session remains active, the stored files remain in the foccache directory and can be referenced in requests using standard two part names. For example, the first request below creates a HOLD file in foccache, which is referenced by the second request:

```plaintext
TABLE FILE CAR
PRINT CAR
ON TABLE HOLD AS FOCCACHE/myfile
END
```

```plaintext
TABLE FILE FOCCACHE/myfile
PRINT *
END
```

When the maximum foccache retention time is reached (180 minutes by default), the foccache directory is removed by the server and can no longer be referenced. (For related information, see Application Settings on page 499.)

This feature provides an important mechanism for caching and running multiple instances of WebFOCUS active and drill-down reports. You can use any WebFOCUS graphical tool to create the request and generate a report.
**Note:** Each time a WebFOCUS user logs into the Managed Reporting (MR) environment, a new session with its own foccache directory is created. Files that were stored in a prior foccache directory are no longer accessible. When the user logs out of MR the foccache directory used within that MR session is no longer accessible.

To access these settings, select Workspace from the menu bar. From the ribbon, click the Workspace SET icon, and select Application Settings, or right-click the Workspace folder in the navigation pane, and select Workspace SET, and then Application Settings.

The Application Settings pane opens, as shown in the following image.

The following Application Settings are saved in the edaserve.cfg file.

`foccache_dir`

Defines the location of the foccache directory. The default is edatemp/foccache/....

`foccache_maxage`

Defines the maximum number of minutes that a foccache directory will last. The default is 180 minutes. When the foccache directory expires, the session also expires.

0 means unlimited (that is, the directory will be remain active as long as the session lasts or the server is running).

`nested_app`

For applications containing subfolders or multiple-level subfolder trees, this parameter controls whether subfolders will be automatically added to the application path.
The valid values are:

- A positive integer - Enable nested application, and only a specific number of subfolder levels in the active application path.

- $n$ - Disables nested applications. Only applications explicitly in the APP PATH will be used.

- $y$ - Enables nested applications. The entire application subfolder tree under each application in the APP PATH is included into active application path.

The default value is 5.

**Note:** For z/OS servers, this setting is only applicable to directory-style applications, it is not applicable to PDS-style applications nor to applications mapped as a collection of ddnames.

**homeapps**

If nested_app is set to $y$ or a number, homeapps defines the location of the home application root directory. With homeapps defined, each connected user will see a *My Home* applications folder on the Application tree. Users can create new applications (home applications) in this folder. These applications will be visible and available only to the connected user and the server administrator. The user will have full access to his home applications.

**Note:** Only available with a DataMigrator or Managed Reporting license. A WebFOCUS Reporting Server requires a homeapps license to enable home applications.

When you have completed your entries, click *Save and Restart Server*.

**Reference:** **Miscellaneous Settings**

Miscellaneous Settings allow you to set additional Workspace operating parameters, including automatic recovery, transaction coordination, soft and hard kill delays, maximum session log rows, time window for running response time averages, and proxy server settings.

To access these settings, select *Workspace* from the menu bar. From the ribbon, click the *Workspace SET* icon, and select *Miscellaneous Settings*, or right-click the *Workspace* folder in the navigation pane, and select *Workspace SET*, and then *Miscellaneous Settings*. 
The Miscellaneous Settings pane opens, as shown in the following image.

### Miscellaneous Settings

**Changing values with an asterisk (*) requires restarting the server**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>automatic_recovery</td>
<td>y</td>
</tr>
<tr>
<td>transaction_coordination_mode</td>
<td>n</td>
</tr>
<tr>
<td>tscom3_kill_delay1</td>
<td>16</td>
</tr>
<tr>
<td>tscom3_kill_delay2</td>
<td>32</td>
</tr>
<tr>
<td>crashed_cleanup</td>
<td>n</td>
</tr>
<tr>
<td>stats_runningavg</td>
<td>600</td>
</tr>
<tr>
<td>htmldecode</td>
<td>n</td>
</tr>
<tr>
<td>proxy_server</td>
<td></td>
</tr>
<tr>
<td>proxy_port</td>
<td></td>
</tr>
<tr>
<td>proxy_user</td>
<td></td>
</tr>
<tr>
<td>proxy_password</td>
<td></td>
</tr>
<tr>
<td>outbound_ssl_certificate_file</td>
<td></td>
</tr>
<tr>
<td>outbound_ssl_certificate_passphrase</td>
<td></td>
</tr>
<tr>
<td>outbound_ssl_certificate_label</td>
<td></td>
</tr>
<tr>
<td>outbound_ssl_certificate_keyfile</td>
<td></td>
</tr>
<tr>
<td>outbound_ssl_auth_server</td>
<td>n</td>
</tr>
<tr>
<td>syslog_max_lines</td>
<td>1000</td>
</tr>
<tr>
<td>popup_timer</td>
<td>5</td>
</tr>
</tbody>
</table>

The following Miscellaneous Settings are saved in the edaserv.cfg file:

**automatic_recovery**

Determines whether the server will automatically recover crashed listeners and/or special services. The default is `n`.

**transaction_coordination_mode**

Selecting `y`, activates the iWay Transaction Coordinator. A Two-Phase Commit will be used when XA-Compliant databases participate in a transaction. The default is `n`.

**tscom3_kill_delay1**

Defines the time (in seconds) allowed for an agent to stop before soft kill is sent. The default is 16.
**tscom3_kill_delay2**
Defines the time (in seconds) allowed for a soft kill to work before a hard kill is sent. The default is 32.

**crashed_cleanup**
By default, crashed agents are kept in the agents table for diagnostics purposes, and are only removed when they are explicitly killed. When this set to \( y \), crashed agents are automatically removed from agents list when the Workspace Manager detects a crash. The default value is \( n \).

**crashed_max_dump**
If crashed_cleanup is set to \( y \), this determines the number of memory dump files retained for later diagnosis.

**stats_runningavg**
Defines the time window in seconds for the calculation of running response time averages. The default is 600.

**htmlencode**
Specifies whether to encode HTML tags in data as plain text in order to prevent attacks by inserting executable code into data. Valid values are \( y \) and \( n \). The default value is \( n \).

**proxy_server**
Defines a proxy server, which acts as an intermediary on requests for resources from other servers.

**proxy_port**
Defines the port number of the proxy server.

**proxy_user**
Defines a user ID for the proxy server.

**proxy_password**
Defines a password for the user ID connecting to the proxy server.

**outbound_ssl_certificate_file**
Required for SSL when using self-signed certificates on i5 systems.

**outbound_ssl_certificate_passphrase**
Required for SSL when using self-signed certificates on i5 systems.
**Workspace Configuration Settings**

- **outbound_ssl_certificate_label**
  Required for SSL when using self-signed certificates on i5 systems.

- **outbound_ssl_certificate_keyfile**
  Required for SSL when using self-signed certificates on i5 systems.

- **outbound_ssl_auth_server**
  Required for SSL when using self-signed certificates on i5 systems.

- **seslog_max_lines**
  Defines the upper limit for the number of rows in a session log. When the limit is exceeded, only the latest records will be kept in the session log and the number of records will equal the limit. The default is 1000.

- **popup_timer**
  Defines the time in seconds to wait before the popup timer appears. The default is 5.

**z/OS Specific Parameters**

- **tmpalloc_primary**

- **tmpalloc_secondary**
  Allocation (in CYLs) for temporary Web Console files allocated by the HTTP listener. The default is 5 and 50, respectively.

- **submit_opt**
  Customizes the call of the IKJEFF10 exit when submitting jobs with the DYNAM SUBMIT command.

- **smf_recno**
  Defines the SMF record number that the server will use to record utilization statistics.

- **smf_subtype**
  Defines which pairs of SMF subtype records are cut. The options are:
  - all. Cut all records. This is the default.
  - logon. Cut logon/logoff subtype only.
  - query. Cut query begin/query end subtype only.

- **privatedd**
  Defines how server will handle allocations for duplicated ddnames (same ddname allocated both to IRUNJCL and from a customer application using DYNAM) and what the search strategy will be.
Procedure: How to Customize the IKJEFF10 Exit for DYNAM SUBMIT From the Web Console (z/OS)

To change how the server calls the IKJEFF10 exit, set the submit_opt parameter as follows:

1. From the menu bar, select Workspace.

2. From the ribbon, click the Settings icon, and select Miscellaneous Settings, or right-click the Workspace folder in the navigation pane, and select Settings, and then Miscellaneous Settings.

   The Miscellaneous Settings page opens.

3. For the submit_opt option, assign a separate value (0 or 1) in each of the three drop-down lists. The default is 000.

   The first drop-down list enables the call to IKJEFF10 from DYNAM SUBMIT. By default, the call is disabled.

   0
   
   Does not call IKJEFF10. This is the default setting.

   1
   
   Calls IKJEFF10.

   The second drop-down list specifies that SUBMIT is to call IKJEFF10 in problem state, not in supervisor state. The IBM specification for IKJEFF10 requires supervisor state. If the version of IKJEFF10 in use at your site is capable of running in problem state, this option may be changed, thus allowing DYNAM SUBMIT to be used with IKJEFF10 when the server is not running APF-authorized. When you set:

   0
   
   Supervisor state is required for calling IKJEFF10. This is the default setting.

   1
   
   Supervisor state is not required to call IKJEFF10.

   The third drop-down list allows SUBMIT to continue in the event that an error occurs while processing an in-stream data set. In-stream data sets are created by the following statements in the job:

   
   //ddname DD *
   //ddname DD DATA
   /*XMIT
   //name XMIT
   /*DATASET
If an error is found in one of the previous statements (for example, a syntax error in the DLM parameter), the SUBMIT operation is normally cancelled. This option allows submission of the job to continue, although in such a case the results are unpredictable since the JCL contained within the in-stream data set may be erroneously interpreted as part of the job being submitted.

0

Terminates SUBMIT on in-stream data set error. This is the default setting.

1

Does not terminate SUBMIT on in-stream data set error.

4. Click Save.

Your entries are registered in the edaserve.cfg file.

Event Routing

Event Routing allows you to launch procedures or send email based on different server events (agent or listener crashes, server configuration errors, disk space limitations, and others). All events are classified by type as information, warning, or error. These can be pre-defined or custom-defined events.

The Customize Event Routing page shows the Default and Customized Event Routing.
The Default routings are shown in the following image.

![Event Routing Table](image_url)

<table>
<thead>
<tr>
<th>Type</th>
<th>Filter</th>
<th>Description</th>
<th>EDAPRINT</th>
<th>Procedure</th>
<th>E-mail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Default</td>
<td>Information</td>
<td>All Information</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>All Warnings</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Error</td>
<td>All Errors</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13023 Server successfully started</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13093 User password has been changed</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13120 Server is requested not to accept any new connections</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13121 Server is requested to accept all connections</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13164 A listener is enabled</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13183 A listener is disabled</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>13191 A data service agent has been started</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>4276 DBCTL interface has been initialized</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Information</td>
<td>4288 DBCTL interface is stopped</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>12088 Connection is rejected because user is invalid</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>12089 Connection is rejected because password is invalid</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>12090 Failed to change user password</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>12092 Connection is rejected because account is expired</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>13173 Number of data service agents has reached the maximum allowed</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40001 No more available agents for required service (maximum number is reached)</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40002 Not enough disk space in dlm_dir directory to process deferred requests</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40003 File listener warning</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40004 CLM failed to query remote server</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40005 Agent exceeded CPU limit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40006 Agent exceeded memory limit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40007 Agent exceeded disk space limit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>40008 Agent exceeded connection time limit</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>35048 Resource Governor canceled a request</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>35097 Resource Management logging did not archive all data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>35037 Resource Management has unarchived logs</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Warning</td>
<td>35029 Resource Management repository is not valid for this release</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Error</td>
<td>60001 Listener, special service or agent crashed</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td></td>
<td>Error</td>
<td>60002 Agent aborted</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
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<td></td>
<td>Error</td>
<td>60003 ETLOG/ETLSTATS write error</td>
<td>✓</td>
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<tr>
<td></td>
<td>Error</td>
<td>13171 Unable to start server</td>
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<td>✓</td>
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<td></td>
<td>Error</td>
<td>13015 Configuration error</td>
<td>✓</td>
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</tr>
<tr>
<td></td>
<td>Error</td>
<td>36114 Agent failed to log Resource Management session data</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
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</table>

@ Customized
Customized routings are shown in the following image.

**Customize Event Routing**

<table>
<thead>
<tr>
<th>Type</th>
<th>Filter</th>
<th>Description</th>
<th>EDAPRINT</th>
<th>Procedure</th>
<th>E-mail</th>
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<td></td>
<td></td>
<td></td>
<td></td>
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<td>Information</td>
<td>13023</td>
<td>Server successfully started</td>
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<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Information</td>
<td>13154</td>
<td>A listener is enabled</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td>13159</td>
<td>A data service agent has been started</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Warning</td>
<td>40001</td>
<td>No more available agents for required service (maximum...</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Warning</td>
<td>40002</td>
<td>Not enough disk space in dim_dir directory to process d...</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Warning</td>
<td>40005</td>
<td>Agent exceeded CPU limit</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Warning</td>
<td>40006</td>
<td>Agent exceeded memory limit</td>
<td>✓</td>
<td>✓</td>
<td></td>
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<tr>
<td>Warning</td>
<td>40007</td>
<td>Agent exceeded disk space limit</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Error</td>
<td>60001</td>
<td>Listener, special service or agent crashed</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Error</td>
<td>60002</td>
<td>Agent aborted</td>
<td>✓</td>
<td>✓</td>
<td></td>
</tr>
<tr>
<td>Information</td>
<td>get</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Procedure: How to Customize an Event Routing**

By customizing event routing, you can launch a procedure or send email based on server events.

1. From the menu bar, select **Workspace**.
2. From the ribbon, click the **Event Routing** icon, or right-click the **Workspace** folder in the navigation pane, and select **Event Routing**.
   
   The Customize Event Routing page opens.
3. Click **Customize New Event Routing**.
The Customize New Event Routing page opens.

4. From the Type drop-down menu, select a message type. The choices are *Error*, *Information*, *Warning*, and *Any*.
5. Enter a criteria in the Filter field or select a predefined one from the drop-down menu.

![Customize New Event Routing](image1)

6. From the EDAPRINT drop-down menu, select Yes if you want to write the selected event message to the server log.

In z/OS, the selected server messages can be also written to the z/OS system log by selecting Yes from the JESLOG drop-down menu, as shown in the following image.

![EDAPRINT and JESLOG](image2)

7. Optionally, enter an email address to send an email when the event occurs.
8. Optionally, enter a procedure to execute in the Procedure field, including the application name, for example, utility/movefiles.

9. Click Add.

The event is added to the Customize Event Routing Page.

10. Click Save and Restart Server.

Setting Workspace Log Properties for Event Routing

Workspace Log properties allow you to specify a suppression interval for email notifications from event routing, and to include a number of lines from the edaprint log file in the email body. The edaprint log file provides information about the events occurring on the server before a triggered event.

Procedure: How to Set Workspace Log Properties for Event Routing

The Workspace Log Properties page controls both event routing email and the edaprint log. For information on the edaprint log, see How to Set Workspace Log Properties to Control the Edaprint Log on page 649.

1. From the menu bar, select Workspace.

2. Open the Logs and Traces folder.

3. Right-click Workspace Logs and select Properties.
4. Enter or select values for the Event Email parameters.

The Event Email parameters are:

`email_suppress_interval`  
Suppresses duplicate email notifications if the same event occurs again during this time interval (in seconds). Zero disabled suppression. The default value is 600 (10 minutes).

`logging_email_edaprint`  
Defines the maximum number of server messages from edaprint.log are included in the email. The default value is 20.

5. Click **Save and Restart Server**.

**EVENT_TEXT and EVENT_ID**

When a procedure is triggered by an event, the ID of the routing event and the text of the event message are automatically available to the procedure as the EVENT_ID and EVENT_TEXT parameters, respectively. The EVENT_TEXT parameter needs to be decrypted using the following user subroutine:
Locale Settings

The Web Console provides parameters that define locale-specific date, time, and currency formats as well as parameters for configuring National Language Support.

Reference: NLS Settings

To access these settings, select Workspace from the menu bar or right-click the Workspace folder. Then click Locale and select Configuration Wizard. The NLS Configuration Wizard opens, as shown in the following image.

The following NLS settings are saved in the nlscfg.err file:

**CODE_PAGE**

Is the code page of the data sources accessed by the server.

Select a code page from the drop-down list of supported code pages, including Unicode.

The default value is 1252 for Windows and UNIX, and 37 for IBM i (formerly known as i5/OS) and z/OS.

The current value of CODE_PAGE is available to applications as the &FOCCODEPAGE variable.

**Optional customization**

Customize code page conversion tables

Select this check box to display a list of code pages and descriptions for the possible data sources accessed by the server or the client code page.

Several code pages are always selected by default and cannot be deselected. These are:

37 – IBM MF United States
Workspace Configuration Settings

137 – U.S. English/Western Europe (Latin 1)
437 – U.S. English
1047 – IBM MF Open Systems (Latin 1)
1252 – Windows Latin; 65001 – Unicode (UTF-8)
65001 Unicode (UTF-8)
65002 Unicode (UTF-EBCDIC)

Other code pages may also be selected by default, depending on the LANG attribute chosen.

The NLS Configuration Wizard creates conversion tables for these code pages to make them available for subsequent conversion.

Select any additional code pages for which you want tables to be created. For example, if you want to designate a particular code page to be generated in synonyms for flat (fixed) files or VSAM files, you must already have created a code page conversion table using the Customize code page conversion table option during NLS configuration.

Recreate ETLLOG, ETLSTATS and FOCUSIU system files

Check this box if you wish to load FOCUS internal files in the server code page (as defined in the CODE_PAGE field).

This is recommended if the compatibility of the new and prior code pages is unknown.

Recreate FOCUS sample files

Check this box if you wish to load the sample files (in the ibisamp application) in the server code page (as defined in the CODE_PAGE field).

TSGU command

TSGU is a utility program to configure NLS settings. It is usually not required, but in the following cases it must be executed manually.

- To create PDFXTBL. When TYPE 1 fonts should be included in PDF format file, the TYPE 1 font transcoding table must be generated using the following syntax:

  PDFX {font-name}

- To create PDFYTBL. When Unicode fonts should be used in PDF format file, the special font information tables (PDFYTBL) must be generated using the following syntax:

  KTBL {pdfy-name}
Complete the configuration, then click **Save/Rebuild NLS Files and Restart Server**. The server creates the necessary transcoding, sorting, and monocasing tables for the selected code page.

**Reference: Locale Parameters**

The Web Console provides parameters for configuring locale-based date, time, and currency parameters.

To access these settings, select **Workspace** from the menu bar or right-click the Workspace folder. Then click **Locale** and select **Locale (Language, Numbers, Currency, Dates)**. The Change Core Engine Settings in edasprof.prf page opens, as shown in the following image.

The following parameter values can be set and stored in edasprof.prf.

**LANGUAGE**

Controls the default value of the code page, and the language of server error messages, if available in translation.

Choose a language name or abbreviation from the drop-down list.

The default value is AMENGLISH (American English) on all platforms.

Localized error message files exist for certain languages. If you choose a language for which localized error message files do not exist, the server messages and console appear in English. If you would like the messages and console to appear in a language for which the server has not been localized, you can provide translation yourself. To localize the console, translate the file wceng.lng and rename it to wcXXX.lng where 'XXX' is the three-letter language code for the server. For error messages, translate all or any relevant *.err files and append the same three-letter language code to it. All files are located in the \home\nls folder.
The current value of LANG is available to applications as the &FOCLANGCODE variable. However, it will be blank if it is not configured.

**COLLATION**

Establishes a binary or case-insensitive collation sequence. The values are:

- **CODEPAGE.** Bases the collation sequence on the code page in effect. This is the default value.
- **BINARY.** Bases the collation sequence on binary values.
- **SRV_CS.** Bases the collation sequence on the LANGUAGE setting, and is case-sensitive.
- **SRV_CI.** Bases collation sequence on the LANGUAGE setting, and is case-insensitive.

When code page files are not modified, CODEPAGE is the same as BINARY, except for Danish, Finnish, German, Norwegian, or Swedish in EBCDIC environment.

The SET COLLATION command has the same effect, and overrides this default setting.

**CDN**

Defines the punctuation symbols to be used for numbers. Valid values are:

- **COMMAS_DOT.** Uses a dot (.) as the decimal separator and comma (,) as the thousands separator. The alias is OFF. This is the default value.
- **DOTS_COMM.** Uses a comma as the decimal separator and dot as the thousands separator. The alias is ON.
- **SPACES_COMM.** Uses a comma as the decimal separator and space as the thousands separator. The alias is SPACE.
- **QUOTES_COMM.** Uses a comma as the decimal separator and single quotation mark (') as the thousands separator. The alias is QUOTE.
- **QUOTES_DOT.** Uses a dot as the decimal separator and single quotation mark as the thousands separator. The alias is QUOTEP.

**CURRENCY_ISO_CODE**

Is a standard three-character currency code such as USD for US Dollars or JPY for Japanese Yen. The default value is default, which uses the currency code for the configured language code.
CURRENCY_DISPLAY
Defines the position of the currency symbol relative to a number. The default value is default, which uses the position for the format and currency symbol in effect. Valid values are:

- LEFT_FIXED. The currency symbol is left-justified preceding the number.
- LEFT_FIXED_SPACE. The currency symbol is left-justified preceding the number, with at least one space between the symbol and the number.
- LEFT_FLOAT. The currency symbol precedes the number, with no space between them.
- LEFT_FLOAT_SPACE. The currency symbol precedes the number, with one space between them.
- TRAILING. The currency symbol follows the number, with no space between them.
- TRAILING_SPACE. The currency symbol follows the number, with one space between them.

CURRENCY_PRINT_ISO
Defines what will happen when the currency symbol cannot be displayed by the code page in effect. Valid values are:

- DEFAULT. Replaces the currency symbol with its ISO code, when the symbol cannot be displayed by the code page in effect. This is the default value.
- ALWAYS. Always replaces the currency symbol with its ISO code.
- NEVER. Never replaces the currency symbol with its ISO code. If the currency symbol cannot be displayed by the code page in effect, it will not be printed at all.

DATE_ORDER
Defines the order of date components for display. Valid values are:

- DEFAULT. Respects the original order of date components. This is the default value.
- DMY. Displays all dates in day/month/year order.
- MDY. Displays all dates in month/day/year order.
- YMD. Displays all dates in year/month/day order.

DATE_SEPARATOR
Defines the separator for date components for display. Valid values are:

- DEFAULT. Respects the separator defined by the USAGE format of the field.
- **SLASH.** Uses a slash (/) to separate date components.
- **DASH.** Uses a dash (-) to separate date components.
- **BLANK.** Uses a blank to separate date components.
- **DOT.** Uses a dot (.) to separate date components.
- **NONE.** Does not separate date components.

**TIME_SEPARATOR**
Defines the separator for time components for the &TOD system variable. Valid values are:

- **DOT.** Uses a dot (.) to separate time components. This is the default value.
- **COLON.** Uses a colon (:) to separate time components.

**BUSDAYS**
Defines which days are business days for date-time functions. The default value is _MTWTF_.

**HDAY**
Specifies a holiday file for listing dates that are non-business days for use with date functions. The default value is OFF (no holiday file).

**WEEKFIRST**
Defines the first day of the week for the WEEK and WEEKDAY components of date and date-time functions.

**Reference:** Times New Roman Font Support for Arabic PDF and PostScript Formats
Users that want to output Arabic characters in PDF or PostScript formats can select the Times New Roman font.

**Reference:** Tahoma Font Support for Thai PDF and PostScript Formats
Users that want to output Thai characters in PDF or PostScript formats can select the Tahoma font.
### Reference: Language and Default Code Pages for Windows and UNIX

This chart provides information generated by the `LANG SET` command from the Windows and UNIX platforms.

<table>
<thead>
<tr>
<th>Language Code</th>
<th>Language Name</th>
<th>Language Abbreviation</th>
<th>Language ID</th>
<th>Code Page</th>
</tr>
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<td>AME</td>
<td>en</td>
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<td>br</td>
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**Reference:** Language and Default Code Pages for IBM i and z/OS

This chart provides information generated by the `? LANG SET` command from the IBM i and z/OS platforms.

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<thead>
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<th>Language Name</th>
<th>Language Abbreviation</th>
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<td>-----------</td>
</tr>
<tr>
<td>082</td>
<td>KOREAN</td>
<td>KOR</td>
<td>ko</td>
<td>933</td>
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<tr>
<td>371</td>
<td>LATVIAN</td>
<td>LVA</td>
<td>lv</td>
<td>1112</td>
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<tr>
<td>370</td>
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<td>LTU</td>
<td>lt</td>
<td>1112</td>
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<td>047</td>
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<td>NOR</td>
<td>no</td>
<td>277</td>
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<tr>
<td>048</td>
<td>POLISH</td>
<td>POL</td>
<td>pl</td>
<td>870</td>
</tr>
<tr>
<td>351</td>
<td>PORTUGUESE</td>
<td>POR</td>
<td>pt</td>
<td>37</td>
</tr>
<tr>
<td>040</td>
<td>ROMANIAN</td>
<td>ROM</td>
<td>ro</td>
<td>870</td>
</tr>
<tr>
<td>007</td>
<td>RUSSIAN</td>
<td>RUS</td>
<td>ru</td>
<td>1025</td>
</tr>
<tr>
<td>085</td>
<td>S-CHINESE</td>
<td>PRC</td>
<td>zh</td>
<td>935</td>
</tr>
<tr>
<td>042</td>
<td>SLOVAK</td>
<td>SVK</td>
<td>sk</td>
<td>870</td>
</tr>
<tr>
<td>034</td>
<td>SPANISH</td>
<td>SPA</td>
<td>es</td>
<td>284</td>
</tr>
<tr>
<td>046</td>
<td>SWEDISH</td>
<td>SWE</td>
<td>sv</td>
<td>278</td>
</tr>
<tr>
<td>086</td>
<td>T-CHINESE</td>
<td>ROC</td>
<td>tw</td>
<td>937</td>
</tr>
<tr>
<td>066</td>
<td>THAI</td>
<td>THA</td>
<td>th</td>
<td>838</td>
</tr>
<tr>
<td>090</td>
<td>TURKISH</td>
<td>TUR</td>
<td>tr</td>
<td>1026</td>
</tr>
<tr>
<td>044</td>
<td>UKENGLISH</td>
<td>UKE</td>
<td>uk</td>
<td>285</td>
</tr>
<tr>
<td>800</td>
<td>UNICODE</td>
<td>UCS</td>
<td>uc</td>
<td>65002</td>
</tr>
</tbody>
</table>

**Login Message**

Server administrators can customize the login and connection result screens with custom messages. The Login Message option is available by right-clicking the Workspace folder in the navigation pane.
**Procedure:** How to Customize the Login Screen With a Message

To customize the login screen:

1. Select *Workspace* from the menu bar.
2. From the ribbon, select the *Login Message* icon, or right-click the *Workspace* folder in the navigation pane, and select *Login Message*.

   The Login Message page opens.

3. Enter the text of the message in the HTML Message field in the Before section, as shown in the following image.

4. Click Save.
The message is added to the login page, as shown in the following image.

**Procedure:** How to Customize the Connection Result Screen With a Message

Server administrators can customize the connection result screen for each user type.

1. Select **Workspace** from the menu bar.
2. From the ribbon, select the **Login Message** icon, or right-click the **Workspace** folder in the navigation pane, and select **Login Message**.
   
The Login Message page opens.
3. Select a user type from the Role drop-down menu. The options are **Server Administrator**, **Application Administrator**, **Server Operator**, **Basic User**, and **All Users**.
4. Enter the text of the message in the Message field of the After field, as shown in the following image.

![Login Message](image)

Optionally, you can set the number of times the message will appear by entering a value in the Display field.

5. Click Save.

The message is displayed after a successful connection, as shown in the following image.

![Message Display](image)
Web Console Appearance

The Web Console appearance parameters control the look of the Web Console, as well as accessibility and menu bar customization.

Reference: Web Console Appearance

To access these settings, select Workspace from the menu bar. From the ribbon, click the Web Console Appearance icon, or right-click the Workspace folder in the navigation pane, and select Web Console Appearance.

The Web Console Appearance page opens, as shown in the following image.

The following Web Console Appearance settings are saved in the edaserv.cfg file.

Server-Wide Default Appearance

Appearance

Controls the look of the Web Console.

Possible values are RIA-CarbonRounded, RIA-Default, and RIA-OceanRounded. The default value is RIA-Default.

Icons

On the Icons drop-down list, the value is Default.
Banner

Specifies if a banner image should be displayed on top of the menu bar in the Web Console. The image file must be located in EDAHOME/etc/wc directory.

Custom Login Banner

Specifies if a banner image should be displayed on the Web Console login page. The image file must be located in EDAHOME/etc/wc directory.

Accessibility

Display Accessibility Option

Allows users to enable or disable an accessibility display.

Menu Bar Appearance

Caption Of The Custom Link

 Specifies the text of a custom link that is shown in the menu bar of the Web Console.

URL Of The Custom Link

Specifies the URL of a custom link that is shown in the menu bar of the Web Console.

Menu or Ribbon

Specifies whether the Web Console will display a menu bar or a ribbon. The default is Ribbon.

When you have completed your entries, click Save.

Focus Sets and Info

You can generate reports about many aspects of WebFOCUS processing using the Focus Sets and Info button on the Workspace ribbon.

Reference: Focus Sets and Info

To access these settings, select Workspace from the menu bar. From the ribbon, click the Focus Sets and Info icon, or right-click the Workspace folder in the navigation pane, and select Focus Sets and Info.

The following options are available.

- Core Engine Settings. For information, see Core Engine Settings on page 528.
- Core Engine System Variables. For information, see Core System Variables on page 529.
- Core Engine Global Variables. For more information, see Core Engine Global Variables on page 531.
Settings for Web Console Preferences. For more information, see Displaying Settings for Web Console Preferences on page 533.

HOLD Keywords. For information, see Displaying HOLD Keywords on page 534.

Focus Limits. For information, see Displaying Focus Limits on page 536.

Error Message Report. For information, see Displaying Error Messages on page 537.

Currency Report. For more information, see Displaying the Currency Report on page 539.

Function Parameters Report. For more information, see Determining Function Parameters on page 540.

Core Engine Settings

Core engine settings allow you to control a wide range of services, including Bulk Load, FOCUTL, HLI, StyleSheet, Common, TABLE, and GRAPH, as well as NLS, Tracing, Obsolete Sets and PFKEYs sets.

Procedure: How to Access Core Engine Settings

To access Core Engine settings:

1. Select Workspace from the menu bar.
2. From the ribbon, click the Settings icon, and select Core Engine Settings, or right-click the Workspace folder in the navigation pane, and select Settings, and then Core Engine Settings.

The Core Engine Settings pane opens, as shown in the following image.

3. Select a service from the Service Area list.
4. Optionally, enter a string in the Setting Name field to find specific settings, using % as a wildcard.
For example, to find settings containing DATE, enter DATE%. All settings are upper case and the Setting Name field is case sensitive.

5. Optionally, enter a string in the Description Contains field to search for settings by their descriptions.

6. Optionally, select a profile from the Select profile drop-down menu.

7. Click Next.

The Change Core Engine Settings pane opens, as shown in the following image.

8. Make your changes and click Save.

The following confirmation message displays:

Core engine settings successfully changed in edasprof.prf

**Core System Variables**

Core System variables control the functionality of the server.

The variables fall into the following categories:

- Display Information
- Operating System
Procedure: How to View Core System Variables

To view Core System variables:

1. Select Workspace from the menu bar.

2. From the ribbon, click the Settings icon, and select Core System Variables, or right-click the Workspace folder in the navigation pane, and select Settings, and then Core System Variables.

The Core System Variable pane opens, as shown in the following image.

3. Select a service from the Service Area list.

4. Optionally, enter a string in the Variable Name field to find specific variables, using % as a wildcard. Variables are all upper case and all begin with an ampersand (&).

5. Optionally, enter a string in the Description Contains field to search for variables by their descriptions.

6. Click Next.
The Core System Variables are displayed, as shown in the following image.

Core Engine Global Variables

You can add global variables to a profile on the server to deliver default values or execute SET commands.

**Procedure:** How to Create Core Engine Global Variables

To create Core Engine global variables:

1. Select *Workspace* from the menu bar.

2. From the ribbon, click the *Settings* icon, and select *Core Global Variables*, or right-click the *Workspace* folder in the navigation pane, and select *Settings*, and then *Core Global Variables*. 

---

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The Core Global Variable pane opens, as shown in the following image.

3. Optionally, select a profile from the drop-down menu. The default is edaprof.

4. Click Add New.

5. On the Core Global Variable pane, select SET or DEFAULT from the Command drop-down menu.

6. Enter a name and value for the variable in the corresponding fields and click Add New, as shown in the following image.

7. Click Save.
Displaying Settings for Web Console Preferences

To display or change the Web Console preferences, select Workspace from the main menu, click the FOCUS Sets and Info button, and then Settings for Web Console Preferences.

The Settings for Web Console Preferences page opens, as shown in the following image.

### Change Settings for Web Console Preferences

**Save settings in**

- **Profile**: Select edasprof

**Appearance**

- **NTM_OMIT_NULLS_IN_SIMPL_DATA CHART**: NO - No (Omit missing (null) values in Data Profiling charts)

**Application Preferences**

- **DESCINFO**: N - No (Show Descriptions on Application Tree)

**Data Assist**

- **AUTORUN_SE**
  - L - Run on Change with Limited Data
  - Auto-run for Synonym Editor
- **AUTORUN_TQ**
  - L - Run on Change with Limited Data
  - Auto-run for Test Query
- **AUTORUN_CC**
  - N - Do Not Run on Change
  - Auto-run for Custom Copy
- **AUTORUN.Upload**
  - Y - Run on Change
  - Auto-run for Upload
- **AUTO_DATA_PREVIEW_SE**
  - Y - Yes
  - Auto Show Data in Synonym Editor tree
- **AUTO_DATA_PREVIEW_TQ**
  - N - No
  - Auto Show Data in Test Query tree
- **AUTO_DATA_PREVIEW_CC**
  - N - No
  - Auto Show Data in Custom Copy tree
- **AUTO_DATA_PREVIEW.Upload**
  - Y - Yes
  - Auto Show Data in Upload tree
- **NTM_USE_SEG_QUAL**
  - NO - For duplicate fields
  - Use segment to qualify field reference
- **NTM_SHOW_EXT_OBJECTS**
  - NO - No
  - Support extended options
- **AUTO_BV_NAMESPACE**
  - ON - Turn On
  - Controls BV_NAMESPACE value (ON/OFF) in Data Assist/Wizards
- **AUTORUN_COMPOUND**
  - N - Do Not Run on Change
  - Auto-run for Compound/Layout

**Data Assist (Joins)**

- **NTMJOIN_CHILD_WITH_SNOWFLAKES**
  - NO - No
  - Insert child segment with snowflakes
- **NTM_DSPL_FULL_NAMES**
  - YES - Yes
  - Display full component names
- **NTM_USE_2PART_NAME**
  - YES - Yes
  - Use application name to qualify synonym reference

You can select a profile in which to save these settings. The default profile is edasprof.prf. You can set preferences for the following categories.

- **Appearance**. Lets you select whether to omit missing or null values in Data Profiling charts. The default value is No.
Application Preferences. Lets you select whether to show descriptions on the Application tree. The default value is No.

Data Assist. You can select values for the following options:

- Auto-run for Synonym Editor. Default value is L, Run on Change with Limited Data.
- Auto-run for Test Query. Default value is L, Run on Change with Limited Data.
- Auto-run for Custom Copy. Default value is N, Do Not Run on Change.
- Auto-run for Upload. Default value is Y, Run on Change.
- Auto show data in Synonym Editor tree. Default value is Yes.
- Auto show data in Test Query tree. Default value is No.
- Auto show data in Custom Copy tree. Default value is No.
- Auto show data in Upload tree. Default value is Yes.
- Use segment name to qualify field references.
- Support extended options. Default value is No.
- Control BV_NAMESPACE value in Data Assist and Wizards. Default value is ON.
- Auto-run for Compound Layout. Default value is N, Do Not Run on Change.

Data Assist Joins. You can select values for the following options.

- Insert child segments with snowflakes. Default value is No.
- Display full component names. Default value is Yes.
- Use application names to qualify synonym references. Default Value is Yes.

Displaying HOLD Keywords

You can display the keywords available for generating different types of HOLD files.

Procedure: How to Display HOLD Keywords

1. Select Workspace from the main menu.
2. From the Settings section of the ribbon, click the FOCUS Sets and Info button, and then HOLD Keywords.
   The HOLD Keywords page opens, as shown in the following image.
3. Select the following parameters.

- Optionally, select a Service Area from the drop-down list.

- Optionally, enter a keyword or keyword pattern in the Keyword text box.

- Optionally, enter a description or description pattern in the Description Contains text box for the keywords you want to see.

- Click Next.

The HOLD Keywords Report is displayed, as shown in the following image.

### HOLD Keywords Description

<table>
<thead>
<tr>
<th>Keywords specific to relational DBMS formats</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPEND</td>
</tr>
<tr>
<td>CONNECTION</td>
</tr>
<tr>
<td>GLOBAL_TEMPORARY</td>
</tr>
<tr>
<td>PERMANENT</td>
</tr>
<tr>
<td>PERSISTENCE</td>
</tr>
<tr>
<td>TABLENAME</td>
</tr>
<tr>
<td>VOLATILE</td>
</tr>
</tbody>
</table>
Displaying Focus Limits

You can display limits for WebFOCUS requests and components, as well as limits that have been removed.

Procedure: How to Display Focus Limits

1. Select Workspace from the main menu.
2. From the Settings section of the ribbon, click the FOCUS Sets and Info button, and then Focus Limits.

The Focus Limits page opens, as shown in the following image.

3. Select the following parameters.

   - Optionally, select a Service Area from the drop-down list.
   - Optionally, enter a limit name or pattern in the Limit text box.
   - Optionally, enter a description or description pattern in the Description Contains text box for the limits you want to see.
   - Click Next.
The FOCUS Limits Description report displays, as shown in the following image.

### Focus Limits Description

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>MAX_AIND_LEN</td>
<td>256</td>
<td>Maximum length of index for alpha field in focus MFD</td>
</tr>
<tr>
<td>MAX_FOCINDX_LEN</td>
<td>12</td>
<td>Size of a FOCUS index field name</td>
</tr>
<tr>
<td>MAX_FOC_SEG_LEN</td>
<td>3968</td>
<td>Maximum length of a FOCUS segment</td>
</tr>
<tr>
<td>MAX_XFOC_SEG_LEN</td>
<td>16284</td>
<td>Maximum length of a XFOC segment</td>
</tr>
<tr>
<td>NTM_LEVCM_MAXSEG</td>
<td>1024</td>
<td>Possible number of segments</td>
</tr>
<tr>
<td>NTM_LEVCM_MAXSEG_XFOC</td>
<td>512</td>
<td>Possible number of segments in XFOCUS</td>
</tr>
<tr>
<td>NTM_MAX_ACTUAL_LEN</td>
<td>14</td>
<td>Length of ACTUAL</td>
</tr>
<tr>
<td>NTM_MAX_DATEPATTERN_LEN</td>
<td>64</td>
<td>Length of a date pattern</td>
</tr>
<tr>
<td>NTM_MAX_FLD_NAME_SIZE</td>
<td>512</td>
<td>Size of a field name/alias</td>
</tr>
<tr>
<td>NTM_MAX_FOC_SEG_NAME_SIZE</td>
<td>8</td>
<td>Size of a FOCUS segment name</td>
</tr>
<tr>
<td>NTM_MAX_FORMAT_LEN</td>
<td>8</td>
<td>Length of FORMAT</td>
</tr>
<tr>
<td>NTM_MAX_HELPMSG_LEN</td>
<td>78</td>
<td>Length of a help message</td>
</tr>
<tr>
<td>NTM_MAX_LABEL_LEN</td>
<td>128</td>
<td>Label length</td>
</tr>
<tr>
<td>NTM_MAX_QUAL_NAME_SIZE</td>
<td>1090</td>
<td>Size of a qualified field name</td>
</tr>
<tr>
<td>NTM_MAX_SEG_NAME_SIZE</td>
<td>64</td>
<td>Size of a segment name</td>
</tr>
<tr>
<td>NTM_MAX_SUFFIX_LEN</td>
<td>6</td>
<td>Suffix length</td>
</tr>
<tr>
<td>NTM_MAX_TABLE_NAME_SIZE</td>
<td>64</td>
<td>Size of a SQL table name including owner</td>
</tr>
<tr>
<td>NTM_MAX_TITLE_LEN</td>
<td>512</td>
<td>Title length</td>
</tr>
<tr>
<td>NTM MODIFY_MAX_FLD</td>
<td>32767</td>
<td>Number of fields in MODIFY/SCAN</td>
</tr>
<tr>
<td>NTM_MTOUP_NAME_SIZE</td>
<td>143</td>
<td>Max length of Dimension/Hierarchy/Measure Group name</td>
</tr>
<tr>
<td>NTM_TEXT_FIELD_LIM</td>
<td>64</td>
<td>Number of TEXT fields in one MFD</td>
</tr>
<tr>
<td>NTM_CAPTION_LENGTH</td>
<td>180</td>
<td>Max length of Dimension/Hierarchy/Measure Group/KPI caption</td>
</tr>
</tbody>
</table>

### Displaying Error Messages

You can display all or different categories of error messages.

**Procedure:** How to Display Error Messages

1. Select **Workspace** from the main menu.

2. From the Settings section of the ribbon, click the FOCUS Sets and Info button, and then Error Message Report.

   The Filter Error Message Report page opens, as shown in the following image.
3. Select the following parameters.

- Optionally, select an Error File from the drop-down list.
- Optionally, check the Show Warnings Only check box to limit the report to warning messages.
- Optionally, uncheck the Show Unused/Reserved Only check box to control whether used or reserved messages display in the report.
- Optionally, enter text in the Text Contains text box for the messages you want to see.
- Click Show Report.
The Error Message report displays in a new tab, as shown in the following image.

<table>
<thead>
<tr>
<th>Error Number</th>
<th>Error Text</th>
</tr>
</thead>
<tbody>
<tr>
<td>14201</td>
<td>(FOC14201) SPLITTER INTERNAL ERROR: %1</td>
</tr>
<tr>
<td>14202</td>
<td>(FOC14202) MEMORY ALLOCATION ERROR</td>
</tr>
<tr>
<td>14203</td>
<td>(FOC14203) SQL FAILED: %1 ERROR</td>
</tr>
<tr>
<td>14204</td>
<td>(FOC14204) FOCUS FAILED: %1 ERROR</td>
</tr>
<tr>
<td>14205</td>
<td>(FOC14205) API FAILED: %1 ERROR</td>
</tr>
<tr>
<td>14206</td>
<td>(FOC14206) API ERROR: %1</td>
</tr>
<tr>
<td>14207</td>
<td>(FOC14207) CONNECTION ERROR: %1</td>
</tr>
<tr>
<td>14208</td>
<td>(FOC14208) CANNOT BUILD MFD %1</td>
</tr>
<tr>
<td>14209</td>
<td>(FOC14209) CANNOT WORK WITH MFD</td>
</tr>
<tr>
<td>14210</td>
<td>(FOC14210) API FUNCTION ADDRESSES ARE NOT VALUABLE %1</td>
</tr>
<tr>
<td>14211</td>
<td>(FOC14211) NO PLAN_TABLE OWNED BY THE USER</td>
</tr>
<tr>
<td>14212</td>
<td>(FOC14212) NO COST_TABLE ERROR OWNED BY THE USER</td>
</tr>
<tr>
<td>14213</td>
<td>(FOC14213) COMMIT AGAINST D92 ENGINE FAILED</td>
</tr>
<tr>
<td>14214</td>
<td>(FOC14214) WRONG TABLE DASD INFORMATION IN EDA CATALOG</td>
</tr>
<tr>
<td>14215</td>
<td>(FOC14215) WRONG TABLE PARTITION DASD INFORMATION IN EDA CATALOG</td>
</tr>
<tr>
<td>14216</td>
<td>(FOC14216) WRONG INDEX DASD INFORMATION IN EDA CATALOG</td>
</tr>
<tr>
<td>14217</td>
<td>(FOC14217) WRONG TABLE UPDATE DASD INFORMATION IN EDA CATALOG</td>
</tr>
</tbody>
</table>

### Displaying the Currency Report.

The currency report lists currency names, ISO codes, currency symbols, currency symbols hexadecimal values, currency symbol character lengths, and currency symbol byte lengths.
To display the Currency Report, select *Workspace* on the main menu, click the *FOCUS Sets and Info* button, and click *Currency Report*. The Currency Report page opens, as shown in the following image.

### Determining Function Parameters

You can determine the parameters for a particular function from the Function Parameters Report. The report also includes a brief description of the function.

#### Procedure: How to Display the Function Parameters Report

1. Select *Workspace* from the main menu.
2. From the Settings section of the ribbon, click the *FOCUS Sets and Info* button, and then *Function Parameters Report*. 

<table>
<thead>
<tr>
<th>Currency name</th>
<th>ISO code</th>
<th>Symbol</th>
<th>Symbol hexadecimal</th>
<th>Char-length</th>
<th>Byte-length</th>
</tr>
</thead>
<tbody>
<tr>
<td>USA dollar</td>
<td>USD</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Eurozone euro</td>
<td>EUR</td>
<td>€</td>
<td>80</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Japanese yen</td>
<td>JPY</td>
<td>¥</td>
<td>35</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>United Kingdom pound sterling</td>
<td>GBP</td>
<td>£</td>
<td>33</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>United Arab Emirates dirham</td>
<td>AED</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Afghan afghani</td>
<td>AFN</td>
<td>Af</td>
<td>41, 66, 73</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Albanian lek</td>
<td>ALL</td>
<td>Lek</td>
<td>4c, 65, 6b</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Netherlands Antillean guilder</td>
<td>ANG</td>
<td>fl</td>
<td>83</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Angolan kwanzza</td>
<td>AOA</td>
<td>Kw</td>
<td>1b, 7a</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Armenian dram</td>
<td>ARM</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Argentine peso</td>
<td>ARS</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Australian dollar</td>
<td>AUD</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Aruban florin</td>
<td>AWG</td>
<td>Arr</td>
<td>41, 66, 6c, 2e</td>
<td>4</td>
<td>4</td>
</tr>
<tr>
<td>Azerbaijani manat</td>
<td>AZN</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bosnia and Herzegovina convertible mark</td>
<td>BAM</td>
<td>KM</td>
<td>4b, 4d</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Barbados dollar</td>
<td>BBD</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Bangladeshi taka</td>
<td>BDT</td>
<td>Tk</td>
<td>54, 6b</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Bulgarian lev</td>
<td>BGN</td>
<td></td>
<td></td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Bahraini dinar</td>
<td>BHD</td>
<td>BD</td>
<td>42, 44</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Burundian franc</td>
<td>BIF</td>
<td>FBU</td>
<td>46, 42, 75</td>
<td>3</td>
<td>3</td>
</tr>
<tr>
<td>Bermudian dollar</td>
<td>BMD</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Brunei dollar</td>
<td>BND</td>
<td>$</td>
<td>24</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Bolivian boliviano</td>
<td>BOB</td>
<td>$b</td>
<td>24, 62</td>
<td>2</td>
<td>2</td>
</tr>
</tbody>
</table>
The Filter IBI Functions Report page opens, as shown in the following image.

3. Select the following parameters.

- Optionally, select a Function Category from the drop-down list. The choices are Simplified, Legacy, and All.

- Optionally, select a function type from the list box.

- Optionally, click Filter by function name AND/OR description to provide a name, description, or pattern for the functions you want to see.

- Click Show Function Parameters to see descriptions of the function parameters.

- Optionally click Show Function Example to see an example of using the function.

4. Click Show Report.

The Function Parameters Report is displayed, as shown in the following image.
License Settings

You can view and change the current license code and provide and/or change your site code using the License Management page.

The license code is encoded to determine the configuration, additional products available in the configuration, the number of CPUs on the server, and the number of user seats the configuration supports.

For more information on how to obtain a new license code, contact Customer Support or your local Information Builders sales office.
Reference: License Settings

To access these settings, select Workspace from the menu bar. From the ribbon, click the License icon, or right-click the Workspace folder in the navigation pane, and select License.

![License Management]

The following License Management settings are saved in the edaserv.cfg file:

When you have completed your entries, click Save and Restart Server.

- **license**
  - Enter the license number (required for the type of server you are using).

- **license_active_report**
  - Enter the license number for WebFOCUS Active Technologies.

- **license_rstat**
  - Enter the license number for the RStat scoring feature.

- **license_maintain**
  - Enter the license number for the Maintain Data feature.

- **site_code**
  - Enter the site code number (required for support calls).

- **license_mobile**
  - Enter the license number for the Mobile Faves feature.

Migrate Settings

The Migrate Settings page allows you to migrate a server from a previous release.
It is recommended that you migrate configuration information from previous releases after you verify the proper basic installation of the new release.

**Procedure:** How to Migrate Configuration Information

To migrate from a previous release:

1. From the menu bar, select **Workspace**.
2. From the ribbon, click the **Migrate** icon, or right-click the **Workspace** folder in the navigation pane, and select **Migrate**.

   The Migrate page opens.

3. Type the full path of the configuration instance directory (EDACONF) or click the ellipsis (...) and navigate to it.
4. Click **Continue**.

**Editing Configuration Files**

Manually editing configuration files requires extensive knowledge of the inner workings of the server. All files except VERSION.CFG are available for editing in the Web Console text editor. VERSION.CFG is created by the installation/configuration process and is only available for viewing from that page.

**Procedure:** How to Edit Configuration Files

1. From the menu bar, select **Workspace**.
2. In the navigation pane, expand the **Configuration Files** folder. You can open the following files for editing:
   - **Workspace.** Opens edaserve.cfg
   - **Administration.** Opens admin.cfg
   - **Communication.** Opens odin.cfg
Version. Opens version.cfg

Server Profile. Opens edasprof.prf

Trace Profile. Opens ibitrace.fex

FDS Profile. Opens suprof.prf

Geography. Opens geo_services.xml.

User/Group Profiles Folder. Has an option for each defined user and group.

Note that both Server Administrators and Application Administrators can edit the user.prf file. However, Server Administrators can edit all user.prfs, while Application Administrators can only edit their own profiles.

Miscellaneous folder. Has the following options:

Server Startup Script. Opens edastart.bat

LOCALE. Opens nlscfg.err

Font. Opens fontuser.xml

Environment. Opens edaenv.cfg (When the server starts, environment variables are set according to entries in the edaenv.cfg file. If the environment conflicts with an entry in edaenv.cfg, the entry in edaenv.cfg takes precedence.)

Configuring Java Services

You can configure Java Services to add JSCOM3 listener, which is required to support and monitor Java-based adapters and functionality, such as GRAPH. You can fine tune server performance.

The server has an automatic Java lookup feature on Windows to enable the Java Listener to start without any direct server configuration steps.

At server startup time, if no explicit JAVA_HOME or JDK_HOME variables are set either at the system environment level or in the server environment configuration file (EDACONF\bin \edaenv.cfg), the Windows registry will be searched for an applicable Java JDK or JRE release (currently 1.7 or higher) and the appropriate variable will be set.

This feature assumes that a Java installation has been done using the Oracle Windows JRE or JDK installation tool (which sets the Windows registry) prior to running the server (but the server itself requires no configuration).
Procedure: How to Configure Java Services for a JSCOM3 Listener

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Java Services folder.
3. Right-click DEFAULT and select Properties.

   The Java Services Configuration pane opens, as shown in the following image.

   ![Java Services Configuration](image)

4. Enter values for each of the configuration sections.
5. When finished, click Save and Restart Java Services.

Reference: Java Services Configuration Parameters

You can enter values on the Java Services Configuration pane for Basic and Advanced settings, JVM Settings, and the Classpath. For information on JVM Settings, see How to Fine Tune JVM Settings From the Web Console on page 549.

Basic

NODE

Defines the logical name for the node block.
PORT
Defines the TCP port number that the listener is listening on.

HOST
Defines the IP address that the listener is listening on.

REFRESH
Defines the minimum number of new connections which can be accepted during the life of each Java server process. A Java server which has reached the limit will be terminated, and a new Java server will be started. To use this feature, you must configure more than one Java server (using NUMBER_READY) to prevent service gaps. It is ignored if only one Java server is configured.

NUMBER_READY
Defines the number of Java servers that the Workspace Manager will create at startup. The first server will listen on the PORT defined in the node. Each additional server will listener on an incremental port, for example, PORT + 1, PORT + 2, etc.

Advanced

GPOOLSIZE
Defines the number of Graph Service Agents that each Java server will create at startup.

FLEX_SUPPORT
Enables JAVA environment to support Flex. It should be set to "0" ONLY if there is a conflict between the CLASSPATH objects.

Classpath

CLASSPATH
The environment variable that tells the JVM or Java-based applications where to look for user-defined classes and packages.

IBI_CLASSPATH
Defines the additional Java Class directories or full path jar names which will be available for Java Services.

Fine-Tuning the Server

You can fine-tune the server to optimize performance.
A Java Services folder on the Workspace Configuration navigation pane enables you to create and manage multiple client connections to JSCOM3, thereby supporting redundancy and load balancing, as well as the ability to refresh JSCOM3 instances while ensuring that at least one connection is always available.

Java exceptions are displayed in the edaprint.log file, and JVM version and path information is displayed in the edaprint.log file and on the Java Services Configuration pane.

**Using JVM Tuning Options to Improve Memory Usage**

You can obtain better memory usage performance in production servers by properly tuning the JVM heap and stack sizes using three options on the JVM Settings tab of the Java Services Configuration pane. These options set initial Java heap size, maximum Java heap size, and Java thread stack size. The options update the odin.cfg file. For related information, see *Editing Configuration Files* on page 544.

Before setting these parameters, it is useful to understand the following relationships.

**Heap Size**

JSCOM3 is the server interface to the JVM. When you start JSCOM3, you can specify memory allocation for the JVM using the -X options shown in the following table.

<table>
<thead>
<tr>
<th>JVM option passed to JSCOM3</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Xms</td>
<td>Determines the initial (minimum) Java heap size.</td>
</tr>
<tr>
<td>-Xmx</td>
<td>Determines the maximum Java heap size</td>
</tr>
</tbody>
</table>

Heap size does not determine the amount of memory your process uses. As you monitor your Java process, you may notice that the amount of memory used exceeds the amount you have specified for -Xmx. This occurs because -Xmx limits the Java heap size and may allocate memory for other things, including a stack for each thread. Therefore, the total memory consumption of the JVM may exceed the value of -Xmx.

**Stack Size**

Each thread in the JVM is assigned a stack. The stack size limits the number of threads you can use. If the stack size is too large, you risk running out of memory since each thread is allocated more memory than it needs.
The following chart describes the JVM Option passed to JSCOM3.

<table>
<thead>
<tr>
<th>JVM option passed to JSCOM3</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>-Xss</td>
<td>Determines the stack size for each thread. You can make this value as low as 1K: -Xss1K. However, if the stack space is too small, you will eventually see an exception class java.lang.StackOverflowError.</td>
</tr>
</tbody>
</table>

Controlling Heap and Stack Size

JSCOM3 uses default values for the minimum (initial) and maximum heap sizes and for the stack size of each thread. To improve performance, you can override the JSCOM3 default settings using the initial Java heap size, maximum Java heap size, and Java thread stack size options. For details, see How to Fine Tune JVM Settings From the Web Console on page 549.

You can also choose the Force Finalization option on the Java Services menu, which assists in memory management by releasing memory that is not currently in use by the Java Virtual Machine (JVM).

Procedure: How to Fine Tune JVM Settings From the Web Console

1. From the Web Console menu bar, select Workspace.
2. In the navigation pane, open the Java Services folder, right-click a service, and select Properties. The Java Services Configuration pane opens.
3. Click the JVM Settings tab and enter values for the following parameters:
   - **Initial Java Heap Size**
     - Defines the initial Java heap size in megabytes (MB), which reflects the minimum amount of memory that is already being used.
     - Supply a positive integer number.
   - **Maximum Java Heap Size**
     - Defines the maximum Java heap size in megabytes (MB).
     - Supply a positive integer number.
   - **Note:** With server-side Java applications like JSCOM3, it is good practice to set the initial (minimum) and maximum heap sizes to the same value.
Java Thread Stack Size

Defines the Java thread stack size in kilobytes (KB).

Supply a positive integer number.

JVM_OPTIONS

Defines the additional JVM options. This is the parameters that can affect the performance characteristics of the JVM.

JVM_PROPERTIES

Defines the additional JVM properties. This is a platform-independent generalization of the system environment variables.

4. Click Save and Restart Java Services to update the odin.cfg file and restart the server with the new settings.

Cluster Manager

Cluster Manager enables you to balance workload across a number of servers. It has polling and monitoring capabilities to identify which servers are up-and-running, average query response time, and the number of concurrent tasks running. CLM can also identify which remote servers are down, and appropriately re-route requests, as well as route a user connection to the most efficient remote server to enhance overall performance.

You can enable Cluster Manager, add remote servers, and configure clusters from the Workspace pane.

Note: CLM connections to a remote server do not use the queuing capabilities that may be configured on remote servers that are members of a cluster.

Procedure: How to Enable Cluster Manager

1. From the menu bar, select Workspace.

2. Right-click the Cluster Manager folder and select Enable.

   The Enable Cluster Manager pane opens.

3. Enter your license code in the LICENSE field and click Configure and Restart Server.

4. Click OK in the confirmation message.

   The Workspace will restart.
Procedure: How to Add Remote Servers

To add remote servers, Cluster Manager must be enabled.

1. From the menu bar, select Workspace.
2. Right-click the Cluster Manager folder, select New Remote Server, and then TCP.

   The Remote Server Configuration pane opens, as shown in the following image.

   ![Remote Server Configuration](image)

3. Enter the host name or IP address for the remote server in the HOST field.
4. Enter the remote server port in the PORT and HTTP_PORT fields.
5. Select a security mode from the SECURITY drop-down menu. The options are Trusted, Explicit, or IWA. Explicit will require you to enter a user and password, and a domain for servers running on Windows.
6. Optionally, enter a description for the server in the DESCRIPTION field.
7. Optionally, expand the Advanced section to set additional parameters. For information, see Remote Server Configuration Parameters on page 552.
8. Click Save.
9. Repeat the procedure to add all the server that will be part of the cluster.
The servers will be added in the Cluster Manager folder, as shown in the following image.

Reference: Remote Server Configuration Parameters

The Remote Server Configuration pane has Basic and Advanced sections.

**Basic**

**NODE**

Assigns a name to the remote server. The node name is a character string of up to 130 characters.

**HOST**

Indicates the host name or IP address for the remote server.

**PORT**

Defines the TCP port number for the server.

**HTTP_PORT**

Defines the HTTP port number for the server.

**SECURITY**

Defines the security mode. The options are Trusted, Explicit, or IWA. Explicit will require you to enter a user and password, and a domain for servers running on Windows.

**DESCRIPTION**

Defines a description for the server.

**Advanced**

**SERVICE NAME**

Indicates the name of the data service used by the remote server.
COMPRESSION
Activates data compression for data transfer between client and server.

ENCRYPTION
Defines the encryption method used in TCP data transfer between client and server. The options are DES, Advanced, or IBCRYPT.

CONNECT_LIMIT
Defines the maximum time that the client will wait for a TCP connection response from the server. The default value is -1, which creates an indefinite wait.

MAXWAIT
Defines the time that the client will wait for a response from the server in seconds. The default value is -1, which creates an indefinite timeout.

REMOTE_EDASTART
Defines the full name of the edastart command for the remote server.

REMOTE_USER_PROFILE
Determined if all commands in the personal $HOME/.profile will be executed before executing the edastart command for the remote server. The default value is y.

TYPE
Defines the type of node. Reserved node will be brought up and down by Cluster Manager to optimize performance.

Add to Cluster Node
Enables you to add the server to a cluster.

Procedure: How to Configure a Cluster
To configure a cluster, you need to have enabled Cluster Manager and configured your remote servers.

1. From the menu bar, select Workspace.
2. Right-click the Cluster Manager folder, point to New Remote Server, and click CLUSTER.
The Remote Cluster Configuration pane opens, as shown in the following image.

3. Enter a name for the cluster in the **NODE** field. The node name is a character string of up to 130 characters.
4. Select the check boxes for the remote servers that you want to include in the cluster.
5. Optionally, enter a description for the cluster in the **DESCRIPTION** field.
6. Click **Save**.
7. Optionally, expand the Advanced section to set additional parameters. For information, see *Remote Cluster Configuration Parameters* on page 554.

The cluster will be added in the Cluster Manager folder, as shown in the following image.

---

**Reference:**  
Remote Cluster Configuration Parameters

The Remote Cluster Configuration pane has Basic and Advanced sections.
Basic

**NODE**

Assigns a name to the cluster.

**ALTERNATE**

Lists the servers that are available for the cluster.

**DESCRIPTION**

Defines a description for the cluster.

Advanced

**CLM_MAXWAIT**

Defines the time that the client will wait for a response from the Cluster Manager in seconds. The default value is -1, which creates an indefinite wait.

**DISPATCH_METHOD**

Defines how Cluster Manager dispatches user queries to remote servers. The options are:

- **Adhere to the settings in Cluster Manager.** The cluster will use the option set in the Cluster Manager settings. This is the default value.

- **RANDOM.** The query will be dispatched randomly to a running server in the cluster. Every server will have the same weight. The query will be queued if a queue is available, and there is no available agent in the selected server.

- **ROUND-ROBIN.** The query will be dispatched to a running server according to the order in the cluster list. The query will be queued if a queue is available, and there is no available agent in the selected server.

- **SMART.** The query will be dispatched to the fastest server according to the statistics gathered from remote servers in the cluster. Overall average response time will be minimized.

- **WEIGHTED.** Weight is assigned to each server based on its relative exponentially smoothed response time. A server is then selected based on the weight. If more than one server is available, the query will not be queued even if a queue is available in the selected server.

**MAX_RSP_TIME**

Defines the maximum query response time that users can expect. If the value is greater than zero, Cluster Manager will attempt to achieve this limit by starting reserved servers or adjusting the configuration of remote servers if AUTO_CONFIG is on.
START_STOP_THRESHOLD

Defines the number of polls. Cluster Manager will start or stop remote reserved servers if query response time is continuously above or below MAX_RSP_TIME for the last START_STOP_THRESHOLD polls. The default value is 2.

Procedure: How to Change Cluster Manager Properties

You can set Cluster Manager properties that apply to all of your clusters.

1. From the menu bar, select Workspace.
2. Right-click the Cluster Manager folder, select Properties.

The Cluster Manager Properties pane opens, as shown in the following image.

![Cluster Manager Properties](image)

3. Make any changes needed to the properties.
4. Click Save and Restart CLM.
5. Optionally, you can also reset the Cluster Manager settings and server statistics by clicking Reset CML and Servers Statistics.
Reference: Cluster Manager Properties

With the exception of UDP Port Number, changing Cluster Manager settings will require restarting the Cluster Manager.

**UDP Port Number**

Defines the UPD port number that the Cluster Manager is listening on for alternate node queries from applications.

**Polling History**

Defines how many statistics are kept for each remote servers. The default value is 100.

**Polling Interval**

Defines how often the Cluster Manager gathers statistics from remote servers in seconds. The default value is 30.

**User Query Dispatch Method**

Defines how Cluster Manager dispatches user queries to remote servers. The options are:

- **Adhere to the settings in Cluster Manager.** The cluster will use the option set in the Cluster Manager settings. This is the default value.
- **RANDOM.** The query will be dispatched randomly to a running server in the cluster. Every server will have the same weight. The query will be queued if a queue is available, and there is no available agent in the selected server.
- **ROUND-ROBIN.** The query will be dispatched to a running server according to the order in the cluster list. The query will be queued if a queue is available, and there is no available agent in the selected server.
- **SMART.** The query will be dispatched to the fastest server according to the statistics gathered from remote servers in the cluster. Overall average response time will be minimized.
- **WEIGHTED.** Weight is assigned to each server based on its relative exponentially smoothed response time. A server is then selected based on the weight. If more than one server is available, the query will not be queued even if a queue is available in the selected server.

**Max Response Time Limit**

Defines the maximum query response time that users expect. If the value is greater than zero, Cluster Manager will attempt to achieve this limit by starting reserved servers or adjusting the configuration of remote servers if AUTO_CONFIG is on.
Threshold for starting/stopping servers

Defines the maximum query response time that users expect. If the value is greater than zero, Cluster Manager will attempt to achieve this limit by starting reserved servers or adjusting the configuration of remote servers if AUTO_CONFIG is on.

Running Average Period

Defines the number of pollings used in averaging statistics. The default value is 2.

Cluster Manager Log

Determines whether Cluster Manager will log cluster statistics in the EDACONF/clmprint.log file.

The maximum number of line for each cluster node is defined by the POLLING HISTORY parameter in odin.cfg. Each line contains the following fields, which are separated by commas, in the following order:

- Cluster name.
- Time in yyyy/mm/dd hh:mm:ss format.
- Number of active servers.
- Total number of connections received among servers since they started or statistics were reset.
- Total number of completed connections among servers since they started or statistics were reset.
- Average response time since servers started or statistics were reset.
- Total number of security failures among servers since they started or statistics were reset.
- Total number of resource failures among servers since they started or statistics were reset.
- Total number of FOCUS errors among servers since they started or statistics were reset.
- Running average response time over the last RUNNING_AVG_PERIOD pollings.
- Number of connections to this cluster since Cluster Manager started or statistics were reset.
- Connection arrival rate to this cluster since the first connection arrived.
Connection completion rate since the first connection arrived.

Running connection arrival rate over the last RUNNING_AVG_PERIOD polling.

Running connection completion rate over the last RUNNING_AVG_PERIOD polling.

**Reference:** Multiple Cluster Manager Configurations

Advanced parameters have been added for multiple cluster nodes. The parameters include:

- **START_STOP_THRESHOLD.** Defines the number of polls. Cluster Manager will start or stop remote reserved servers if query response time is continuously above or below MAX_RSP_TIME for the last START_STOP_THRESHOLD polls.

- **MAX_RSP_TIME.** Defines the maximum query response time that users expect. If the value is greater than zero, Cluster Manager will attempt to achieve this limit by starting reserved servers or adjusting the configuration of remote servers if AUTO_CONFIG is on.

- **DISPATCH_METHOD.** Defines how Cluster Manager dispatches user queries to remote servers.

These parameters work on the cluster node level and override the values defined in the CLM node.

**Monitoring Server Activity**

You can monitor every server type and change its operation parameters through the Web Console. Those changes can affect the behavior and performance of the server.

This topic describes how to monitor the following:

- Data Services
- Java Services
- Special Services and Listeners

It also describes how to perform certain administrative tasks on a server.

**Monitoring Server Status**

You can view the system and system memory status from the Status page.

1. To access the Status page, select Workspace from the main menu.
2. From the ribbon, click the Status icon, or right-click the Workspace folder and select Status.
The Status page opens, as shown in the following image.

You can also access the last agent trace by selecting Status from the Monitor section of the ribbon.

**Monitoring Data Services**

From the Web Console, you can:

- Display the Data Services Agents page, and customize the page to include only those statistics that you are interested in. The Data Services Agents page displays statistics for the current list of agents monitored by the Workspace Manager.

- Display the Data Service Agents page for a selected service. You can customize the page to include only those statistics that you are interested in.
Display statistics, including system-extended statistics, for an individual Data Service Agent.

- Display a status report for all Data Services. You can customize the report to include only those statistics that you are interested in.

- Display aggregated statistics for all Data Services.

- Display aggregated statistics for a selected Data Service.

- Display connection statistics.

As you monitor Data Service activity, you can also perform the following administrative tasks from the Web Console:

- Reset aggregated statistics for Data Services and start collecting them from the beginning.

- Kill one or more Data Service Agents.

- Start one or more new Data Service Agents.

- Display an error message for a Data Service Agent.

**Displaying and Customizing a Data Service Agents Page**

This topic describes how Server Administrators can display the Data Service Agents page for all Data Services or for an individual Data Service. Server Administrators access the page from the Workspace on the Web Console menu bar, using the Agents menu option for Data Services.

If you are a user other than a Server Administrator, you can access the same page and the same statistics from My Console on the Web Console menu bar. With the Manage My Agents option, you can monitor and manage your own agents, that is, the agents that match your user ID. If granted the applicable privileges, you can also monitor, or monitor and manage, the agents of the other users in your group.

**Procedure:** How to Display and Customize the Data Services Agents Page

1. From the menu bar, select Workspace.

2. From the ribbon, click the Data Service Agents icon, or, in the navigation pane, right-click the Workspace folder and click Data Service Agents or right-click the Data Services folder and click Agents.

   The Data Services Agents page opens on the right.

   The table in *Data Service Agents Performance Parameters* on page 564 describes all the statistics that you can display on the page.
3. To choose specific statistics that you want to display on the report, click *Choose Columns* on the View menu, as shown in the following image.

The page that opens lists the available statistics. A description of each statistic is provided in the Description column, to help you tailor the page for your needs.

Select the check box for each statistic that you want to display on the page, and de-select the check box for each statistic that you do not want to display.

Click *OK* when you have made your selections.

The following image shows the Choose Columns page.
4. To filter the values that you want to display on the page, right-click a column heading for an alphanumeric column, point to Filter, and select filtering options from the context menu, as shown in the following image.

![Data Services Agents]

You are returned to the Data Service Agents page with your filter activated.

5. At the upper-right of the report pane, optionally click Refresh Now to refresh the statistics, or click the Refresh interval check box and type the number of seconds between automatic refreshes.

In the following image, the cursor is pointing to the Refresh Now button.

![Refresh Now]

**Procedure:** How to Display and Customize a Data Service Agents Page Associated With a Selected Service

Since agents are associated with services, you may wish to display current service statistics.

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Data Services folder.

3. Right-click the name of the service on which you want to report, for example, WC_DEFAULT.

4. From the menu, click Agents.

   The Data Service Agents page associated with the selected service is displayed on the right. The table in Data Service Agents Performance Parameters on page 564 describes all the statistics that are provided on the page.

5. You can customize and filter the report, as described in How to Display and Customize the Data Services Agents Page on page 561.

**Reference:** Data Service Agents Performance Parameters

The following statistics can appear on a Data Service Agents page. Each agent is represented as a separate row on the report.

**General**

**Tscomid**

Identification number associated with the Data Service Agent.

**Service**

Name of the data service for the agent.

**State**

Current state of the agent. Possible values are in use, DBMS call, idle, aborted, crashed, stopping, or starting.

A session connects and is *in use* until the moment that it disconnects. This includes all time spent between a session suspension and resumption when the process is not using the CPU but still has resources allocated for at least one session.

*DBMS call* indicates that the agent is waiting for a database to return data.

*Idle* means that the agent is not connected. It has no sessions at all, whether active or suspended.

Aborted and crashed are abnormal states resulting from a fatal software error detected by the program (aborted) or by the operating system (crashed). The agent process is no longer running, and these states are provided for diagnostic purposes. The Server Administrator can clear (using the kill option) such agents after the problem is investigated.

Stopping and starting are normal transitory states, which are self-explanatory.
**Client Information**

**User**
User ID associated with the server connection.

**Group**
Group ID associated with the server connection.

**Client Session**
Session ID uniquely identifying the client session.

**Client Address**
For some protocols, the network address of the connected client.

**Code Page**
Character code page used by the client connected to the session.

**Defer ID**
Unique identifier assigned to the submitted deferred request.

**Scheduler Job ID**
Unique identifier assigned to the last submitted scheduled or CMASAP request.

**FOCUS Information**

**Query Time**
Last time that a request to the agent was made. This value is used to calculate the time that an agent is idle, in cases in which an *idle agent limit* was set.

**Command**
First eight characters of the last instruction executed by the data access agent.

**Procedure**
Displays the procedure currently being executed or completed by each agent. For example, when a procedure, which is a part of a job, executes another procedure, the name of this procedure is shown in a Procedure column.

**Top Level Procedure**
Displays calling procedures or calling flows executed or submitted by agents.

**Note:** This column is not shown by default on the Data Services Agents page. To display it, click *Choose Columns*, select its check box on the Select the columns that will appear on the Agents page, and click *OK.*
Monitoring Server Activity

Master File

Name of the last Master File that was processed by the agent. The displayed name can be up to 64 characters.

Executed Class

Last Java class executed. This value includes explicitly called Java classes (such as CALLJAVA), and implicitly called classes (such as GRAPH FILE).

Response Time

Time from the moment that the server receives the request (regardless of the requesting tool, that is, Web Console, DataMigrator, or WebFOCUS) until the request completes and the response is sent to the requester.

Server Time

Response time minus DBMS processing time.

Error Number

Last &RETCODE that is set upon procedure (FOCEXEC) completion. Zero (0) is normal. Any other value indicates an abnormal completion.

Focus I/O

Number of FOCUS I/O operations performed by the agent.

Foccache Ticket

Unique identifier assigned to the last request that used the foccache directory.

Number of Transactions

Number of transactions or HLI commands performed by the agent.

Adapter Information

DBMS I/O

Number of external I/O operations performed by the agent.

DBMS Time

Amount of DBMS processing time in seconds.

Change Data Capture Information

Source DBMS Adapter

Suffix of the listening adapter.
**Source Table Name**
Data source that is listened on.

**Status**
Current status of the adapter.

**Processed Transactions**
Number of processed LUWs (files).

**Polling Interval**
Interval at which polling takes place.

**Timeout Interval**
Amount of time during which there is no activity, and after which a timeout occurs.

**Transactions Processing Limit**
Maximum number of LUWs (files) that are processed by the adapter in one request.

**File Listener Information**

**Source File Type**
Suffix of the listening adapter.

**Source Directory (File)**
Data source that is listened on.

**File Extension**
Extension of processed files.

**Status**
Current status of the adapter.

**Processed Files**
Number of processed LUWs (files).

**Processed Bytes**
Number of bytes processed by the file listener adapter.

**Files in wait queue**
Number of selected files waiting to be processed by the file listener adapter.

**Processing time**
Rounded number of seconds that the file listener adapter spent in processing files.
**Wait for work time**

Rounded number of seconds that the file listener adapter spent in waiting for files.

**Average files per second**

Average number of files per second that the file listener adapter processed.

**Average bytes per second**

Average number of bytes per second that the file listener adapter processed.

**Average file wait time**

Average time in seconds that the file listener adapter spent in waiting for files.

**Polling Interval**

Interval at which polling takes place.

**Timeout Interval**

Amount of time during which there is no activity, and after which a timeout occurs.

**Files Processing Limit**

Maximum number of LUWs (files) that are processed by the adapter in one request.

**System**

**CPU Time**

Total CPU time used by the process.

**Memory Usage (KB)**

Amount of memory, in kilobytes, used by the process.

**Disk Usage (KB)**

Disk space, in kilobytes, used by the process.

**Process ID**

Operating system specific process identification number that is associated with the agent.

**Procedure:** **How to Display Statistics for an Individual Data Service Agent**

1. Customize and display the Data Services Agents page, as described in *How to Display and Customize the Data Services Agents Page* on page 561.

2. On the page, right-click the row for the individual Data Service Agent whose statistics you want to display. For example, right-click the row for the agent identified as Tscomid 11.

3. From the menu, click *Statistics*. 

---

Information Builders
The Agent Statistics pane opens. On this pane, you will see the statistics described in *Data Service Agents Performance Parameters* on page 564, followed by system-extended statistics for the selected agent process.

**Reference:** **System-Extended Statistics for an Individual Data Service Agent**

The following table describes the system-extended statistics for an individual Data Service Agent.

<table>
<thead>
<tr>
<th>Statistic</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>PageFaultCount</td>
<td>Standard Windows memory management statistics for the monitored process.</td>
</tr>
<tr>
<td>PeakWorkingSetSize (KB)</td>
<td></td>
</tr>
<tr>
<td>WorkingSetSize (KB)</td>
<td></td>
</tr>
<tr>
<td>QuotaPeakPagedPoolUsage</td>
<td></td>
</tr>
<tr>
<td>QuotaPagedPoolUsage</td>
<td></td>
</tr>
<tr>
<td>QuotaPeakNonPagedPoolUsage</td>
<td></td>
</tr>
<tr>
<td>QuotaNonPagedPoolUsage</td>
<td></td>
</tr>
<tr>
<td>PagefileUsage</td>
<td></td>
</tr>
<tr>
<td>PeakPagefileUsage</td>
<td></td>
</tr>
<tr>
<td>Total Execution Time</td>
<td>Cumulative execution time of transactions performed by the agent.</td>
</tr>
</tbody>
</table>

**Displaying Status Statistics and Aggregated Statistics for Data Services**

You can display and customize a status report for all Data Services, and display aggregated statistics for all Data Services or for a selected service.

**Procedure: How to Display and Customize a Data Services Status Page**

1. From the menu bar, select *Workspace*.
2. In the navigation pane, right-click the *Data Services* folder, and select *Services*.

The Data Services Status page is displayed on the right, as shown in the following image.
The table in *Aggregated Statistics for Data Services* on page 572 describes all the statistics that you can display on the report.

3. To choose specific statistics that you want to display on the report, click *Choose Columns* from the *View* menu, and proceed according to the instructions in *How to Display and Customize the Data Services Agents Page* on page 561.

4. At the upper-right of the report pane, optionally click *Refresh Now* to refresh the statistics, or click the *Refresh interval* check box and type the number of seconds between automatic refreshes.

**Procedure:**  **How to Display Aggregated Statistics for All Data Services**

1. From the menu bar, select *Workspace*.

2. From the ribbon, click the *Data Service Statistics* icon, or right-click the *Workspace* folder in the navigation pane, and select *Data Service Statistics*. 


The Data Service Statistics pane opens on the right. The following image shows a sample Data Service Statistics pane.

![Data Service Statistics](image)

### General
- **Service**: All Services

### Performance
- **Agents Now**: 4
- **Agents Peak**: 2
- **Connections Total**: 167
- **Connections Completed**: 167
- **Avg. Response Time**: 0:00:00.671
- **Running Avg. Response Time**: 0:00:00.804
- **Avg. DBMS Time**: 0:00:00.016
- **Running Avg. DBMS Time**: 0:00:00.016
- **Avg. Server Time**: 0:00:00.655
- **Running Avg. Server Time**: 0:00:00.788
- **Queued Now**: --
- **Queue Timeout**: --
- **Queued Peak**: --
- **Queue Time**: --

### Errors
- **Resource Fails**: 0
- **Security Fails**: 0
- **Focus Errors**: 3

### System
- **CPU Time**: 0:00:02.539

---

Server Administration 571
The table in *Aggregated Statistics for Data Services* on page 572 describes the statistics that are provided.

**Procedure:**  **How to Display Aggregated Statistics for a Selected Data Service**

1. From the menu bar, select *Workspace*.
2. In the navigation pane, open the *Data Services* folder.
3. Right-click the name of the service on which you want to report, for example, *WC_DEFAULT*, and select *Statistics*.

   The aggregated statistics for the selected service are displayed on the right. The table in *Aggregated Statistics for Data Services* on page 572 describes the statistics that are provided.

**Reference:**  **Aggregated Statistics for Data Services**

The following aggregated statistics are provided for Data Services:

**General**

**Service**

If you are displaying aggregated statistics for all Data Services, this value is All Services.

If you are displaying aggregated statistics for a selected service, this value is the name of the service configured for Workspace Manager in the edaserve.cfg file.

**Performance**

**Agents Now**

Number of agents that are currently running.

**Agents Peak**

Maximum number of agents that were running at any given time.

**Connections Total**

Number of attempted connections to servers since they were started, or from the time that statistics were reset.

This value is different from the total number of sessions, since a persistent session can connect multiple times for different requests.

**Connections Completed**

Number of successfully completed connections to servers since they were started, or from the time that statistics were reset.
Avg. Response Time

Average number of seconds for server response. This value does not include data transfer time. See *Calculating and Displaying Averages* on page 574, for more information.

Running Avg. Response Time

Response time, averaged over the time interval defined by the edaserve.cfg parameter stats_runningavg. The default value is 600 seconds.

Avg. DBMS Time

Average DBMS processing time in seconds.

Running Avg. DBMS Time

Average DBMS processing access time in seconds.

Avg. Server Time

Average response time minus DBMS processing time in seconds.

Running Avg. Server Time

Average response time minus DBMS processing access time in seconds.

Queued Now

Number of currently queued connections. Not applicable when queuing is off.

Currently running jobs are included in the connection total, but not in connections completed or in resource failures.

Queue Timeout

Number of connections that went into the queue and timed out (not available when queuing is off).

Queued Peak

Maximum number of connections that are queued at any given time (not available when queuing is off).

Queue Time

Average number of seconds spent in queue by all connections (not available when queuing is off).

Errors

Resource Fails

Number of connections rejected for lack of available agents. This value includes timed-out queued connections.
Security Fails

Number of connections that failed due to invalid credentials. For details about errors and failures, see the edaprint.log file, which is saved where the server is installed.

Focus Errors

Number of completed connections with WebFOCUS errors during request execution. For example, the adapter was not properly configured, or the data description or procedure was not found.

System

CPU Time

Total CPU time used by the server.

Memory Usage (KB)

Amount of memory, in kilobytes, used by the server.

Disk Usage (KB)

Total disk space, in kilobytes, used by the server.

Reference: Calculating and Displaying Averages

Variables that are averages (avg) are fractional numbers of seconds rounded to the nearest millisecond for display purposes, but actually computed in higher precision, depending on the operating system:

- Avg Rsp Time is a measure of waiting time - idle time + running (that is, agent processing) time for all connections, divided by number of connections. It is actually the average time from the moment that the user clicks to send a request to connect or resume, until the moment that the answer appears in the browser, when the user suspends or disconnects the session.

- Agent processing time is the part of the connection duration spent only on running the request.

- Running time proportion of a connection is the percentage of its running time compared to its duration.
The accuracy of the three corresponding averages is limited only by the precision of the operating system. In the rare case in which a machine is faster than the precision of its time-measuring, accuracy side effects may occur:

- For an individual connection that has a duration shorter than the precision of the operating system, duration and running time cannot be measured and are both 0. The server considers it a 100% running time. A high occurrence of these instances produces an overestimated average proportion.

- If the duration is longer than the precision because of waiting time, but the running time is still less than the precision, then a zero is counted toward the average running time and in calculating the proportion. A 0% running time proportion is recorded. A high occurrence of these instances produces an underestimated proportion.

**Working With the Connection Queue**

The Connection Queue displays the statistics for the current list of connections, enabling administrators to monitor, and if necessary, cancel individual connections.

A connection refers to a physical connection between Client and Server. There are two types of connections:

- An active connection is one that is assigned to a session in a data access agent.

- A queued connection is one for which there are no available agents for the requested service, and the service is configured with a queue.

A queued connection waiting for an agent becomes active as soon as an agent is available. If the maximum time to wait in the queue is reached, the connection is automatically cancelled by the Workspace Manager.

**Procedure:** How to Display Statistics for All Connections

1. From the menu bar, select **Workspace**.
2. In the navigation pane, right-click the Data Services folder, and click Connection Queue, as shown in the following image.

![Workspace screenshot](image)

The Connection Queue report is displayed on the right.

The table in Connection Statistics on page 576 describes the statistics on the report. Each connection is represented as a separate row on the report.

**Reference: Connection Statistics**

The following statistics appear on the Connection Queue report.

**Service**

Name of the data service for the connection.

**Type**

Connection type, either connect or resume.

**User**

User ID that connected to the session.

**Authentication**

Type of authentication used to connect, either trusted, explicit, or IWA.

**Requester ID**

Unique identifier for the network connection created by a listener.
**Time In**

Time at which the connection was activated or queued. This value determines when a queued connection times out.

**Client Address**

Network address of the connecting client.

**Foccache Ticket**

Unique identifier assigned to the last request that used the foccache directory.

**Procedure: How to Kill a Connection**

To cancel a connection, click the row for the connection on the Connection Queue report, and from the menu, click *Kill Connection*, as shown in the following image.

- For an active connection, its session is forcefully disconnected from its agent.
- For a queued connection, it is simply cancelled and the client gets the same error that it would get if queuing was off and there were no available agents, or if the queue was full.

**Performing Administrative Tasks for Data Services**

You can perform certain administrative tasks as you monitor Data Service activity.

- Reset aggregated statistics for Data Services.
- Save the last FOCUS command.
- Kill one or more Data Service Agents.
- Kill agents by connected userid
- Start one or more new Data Service Agents.
- Display an error message for a Data Service Agent.
**Procedure:** How to Reset Aggregated Statistics for Data Services

You can clear aggregated Workspace Manager statistics for Data Services and start collecting them from the beginning.

1. From the menu bar, select **Workspace**.
2. In the navigation pane, right-click the **Data Services** folder.
3. From the menu, click **Reset Statistics**.

**Procedure:** How to Save the Last FOCUS Command

You can save the last FOCUS command executed by an agent as a new procedure and run it separately from the Web Console. This provides a great tool for debugging server issues.

1. From the menu bar, select **Workspace**.
2. Right-click an agent on the Data Services Agent page and click **Save Last FOCUS Command**.

The Create New Procedure as Text page opens, as shown in the following image.

3. Click the **Save As** button.
The Save As dialog box opens, as shown in the following image.

4. Select an application folder.
5. Enter a name in the File Name field.
6. Click OK.
Procedure: How to Kill One or More Data Service Agents

There are a number of ways to kill Data Service Agents:

☐ To stop one or a number of agents, select the check box next to each agent, and click **Kill Selected Agents**, as shown in the following image.

![Data Services Agents](image)

The running agent is terminated, invalidating any current connection to that agent. If a request is then issued from such a connection, an error message is returned. Stopping an agent is therefore an emergency administrative measure, as it disrupts the application. After an agent is terminated, the Data Services Agents pane refreshes automatically. The corresponding row of the terminated agent remains, and the State is listed as **stopping** until the row eventually disappears. You can also click **Refresh Now** to update the pane and remove the row.

☐ To stop an individual agent, you can also right-click the row for the agent, and click **Kill This Agent** from the menu. When asked if you want to continue to kill the agent, click **OK**.

☐ To stop an individual agent without permitting the DBMS to perform any cleanup tasks, choose **Hard Kill This Agent** from the menu. A message informs you that a hard kill may leave resources inaccessible and should be used only as a last resort. Click **OK** to continue the hard kill.
**Important:** Use this option only when *Kill This Agent* fails.

- To stop all agents belonging to the same user ID, look for a row for the agent that is currently connected to the desired user ID. Right-click that row, and select *Kill Agents With The Same User ID*.

- To stop all agents associated with a selected service, right-click the service beneath the Data Services folder, and select *Kill All Agents* from the menu, as shown in the following image. When asked to confirm your request, click *OK*.

![Agent Management Menu](image)

- For extreme situations in which you want to terminate all running agents, right-click the Data Services folder in the navigation pane. From the menu, click *Kill All Agents*. When asked to confirm your request, click *OK*. 
**Procedure:** How to Kill Agents by Connected User ID

In the Web Console, look for a row for the agent in the Data Services Agents pane that is currently connected to the desired user ID, then right-click that row and click *Kill Agents With The Same User ID*, as shown in the following image.

To kill agents from the command line, the syntax is:

```
edastart -killuser <userid>
```

In addition, for the z/OS platform, a z/OS operator MODIFY command can also be used, as follows:

```
/F <server_jobname/started task>,-killuser <userid>
```

---

**Procedure:** How to Start One or More New Data Service Agents

Use this method to start additional agents, even when there are agents already running.

1. From the menu bar, select *Workspace*.
2. In the navigation pane, expand the *Data Services* folder.
3. Right-click the name of the service for which you want to start agents.
4. From the menu, click *Start New Agents*. 

---

Monitoring Server Activity
5. On the Start New Data Service Agents pane, type the number of new agents to start for the selected service, as shown in the following image. Then click **Start**.

On the Data Services Agents pane, you will see that the new agents are listed, with the State of **starting**.

**Procedure:** How to Display an Error Message for a Data Service Agent

If a procedure generates an error, you can display the error message on the active agent.

1. From the menu bar, select **Workspace**.
   
   The Data Service Agents pane opens.

2. In the Tscomid column, right-click the **number** associated with an agent, and click **View Error** from the menu, as shown in the following image.

The latest error is displayed in a separate window.
Example:  Displaying an Error Message for a Data Service Agent

The following error was generated on an agent when a procedure was run against a file that could not be found. Clicking the number of the agent that ran the procedure produced the following message:

(FOC205) THE DESCRIPTION CANNOT BE FOUND FOR FILE NAMED: XYZ
BYPASSING TO END OF COMMAND

Tip: The error message is also stored in the Session Log, which you can access by clicking Session Log on the Web Console User menu. In the Session Log, you can click the message to see expanded information, including troubleshooting suggestions. For example:

(FOC205) THE DESCRIPTION CANNOT BE FOUND FOR FILE NAMED:
No data description can be found for the file requested. Check the Master File Descriptions allocated or available, or the spelling of the file name.

For more information on the Session Log, see Showing the Session Log on page 662.

Monitoring Java Services

From the Web Console, you can:

- Display a Performance Report for all Java Service Agents. The report displays statistics for the current list of agents monitored by the Workspace Manager. Multiple connections are supported, providing redundancy and load balancing capabilities. Also provided is the ability to refresh JSCOM3 instances after a specified number of connections, while ensuring that at least one connection is always available.

- Display statistics for an individual Java Service Agent.

- Display aggregated statistics for all Java Services.

As you monitor Java Service activity, you can also perform the following administrative tasks from the Web Console.

- Reset aggregated statistics for Java Services and start collecting them from the beginning.

- Stop or start one or more existing Java Service Agents.

- Kill one or more Java Service Agents.

- Start one or more new Java Service Agents.
Displaying and Customizing a Performance Report for Java Service Agents

This topic describes how Server Administrators can display a Performance Report for the agents for all Java Services or statistics for an individual Java Service Agent.

Procedure: How to Display a Performance Report for All Java Service Agents

1. From the menu bar, select Workspace.
2. In the navigation pane, right-click the Java Services folder, and select Agents.

   The Java Services Agents pane opens on the right.

   The following image shows a sample report.

   ![Image of a sample performance report]

   The table in *Performance Report for Java Service Agents* on page 585 describes the statistics displayed on the report.

3. At the upper-right of the report pane, optionally click Refresh Now to refresh the statistics, or click the Refresh interval check box and type the number of seconds between automatic refreshes.

   In the following image, the cursor is pointing to the Refresh Now button.

   ![Image of Refresh Now button]

Reference: Performance Report for Java Service Agents

The following statistics appear on the Performance Report for Java Service Agents. Each agent is represented as a separate row on the report.

**Jscomid**

Unique identification number assigned to each Java Service Agent. You can start and kill JSCOM3 connections. Each started connection is issued a unique number. If you kill a connection, its number is retired. A new connection is assigned an entirely new Jscomid.
**Monitoring Server Activity**

**Port**
Port number for each Java Service Agent. Numbering starts with a base number and increases by one for each active agent.

**Status**
Current status of the instance. Possible values are starting, active, stopping, or stopped.

**Process ID**
Operating system specific process identification number associated with each Java Service Agent.

**Connections**
Total number of clients connected to JSCOM3, both active and inactive.

**Active Connections**
Active client connections to JSCOM3.

**Last User**
Name of the user who executed the class.

**Last Executed Class**
Last executed Java class. This includes explicitly called Java classes (such as CALLJAVA), and implicitly called classes (such as GRAPH FILE).

**Free Memory (KB)**
Amount of memory, in kilobytes, available to the Java Virtual Machine (JVM).

**Procedure: How to Display Statistics for an Individual Java Service Agent**

1. Display the Performance Report for all Java Service Agents, as described in *How to Display a Performance Report for All Java Service Agents* on page 585.

2. Right-click the row for the individual Java Service Agent whose statistics you want to display, and select View Statistics.
The Statistics pane opens, as shown in the following image. On this pane, you will see the statistics described in *Statistics for an Individual Java Service Agent* on page 587.

<table>
<thead>
<tr>
<th>Statistics</th>
<th>JSCOM3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>JSCOM3</td>
</tr>
<tr>
<td>Remark</td>
<td>--</td>
</tr>
<tr>
<td>State</td>
<td>active</td>
</tr>
<tr>
<td>Process ID</td>
<td>1184</td>
</tr>
<tr>
<td>Port Number</td>
<td>3103</td>
</tr>
<tr>
<td><strong>System</strong></td>
<td></td>
</tr>
<tr>
<td>PageFaultCount</td>
<td>9129</td>
</tr>
<tr>
<td>PeakWorkingSetSize (KB)</td>
<td>26216</td>
</tr>
<tr>
<td>WorkingSetSize (KB)</td>
<td>25440</td>
</tr>
<tr>
<td>QuotaPeakPagedPoolUsage</td>
<td>55138</td>
</tr>
<tr>
<td>QuotaPagedPoolUsage</td>
<td>54857</td>
</tr>
<tr>
<td>QuotaPeakNonPagedPoolUsage</td>
<td>14032</td>
</tr>
<tr>
<td>QuotaNonPagedPoolUsage</td>
<td>13224</td>
</tr>
<tr>
<td>PageFileUsage</td>
<td>26243640</td>
</tr>
<tr>
<td>PeakPageFileUsage</td>
<td>26056752</td>
</tr>
<tr>
<td>Total Execution Time</td>
<td>0:00:02.625</td>
</tr>
<tr>
<td><strong>Connections</strong></td>
<td></td>
</tr>
<tr>
<td>Jscorrid</td>
<td>1</td>
</tr>
<tr>
<td>Number of Connections</td>
<td>1</td>
</tr>
<tr>
<td>Number of Active Connections</td>
<td>0</td>
</tr>
<tr>
<td>Last User</td>
<td>--</td>
</tr>
<tr>
<td>Last Executed Class</td>
<td>ibi.jsgraph.IBIRunJSCOMGraph</td>
</tr>
</tbody>
</table>

3. At the upper-right of the report pane, optionally click "Refresh Now" to refresh the statistics, or click the "Refresh interval" check box and type the number of seconds between automatic refreshes.

**Reference:** *Statistics for an Individual Java Service Agent*

The following statistics are for an individual Java Service Agent.

**General**

**Name**

Name of the Listener that is serving the Java Service.

**Remark**

Additional property of the Service or Listener, where available.
State

Current state of the connection. Possible values are starting, active, stopping, or stopped.

Process ID

Operating system specific process identification number associated with the Java Service.

Port Number

Port number for the Java Service. Numbering starts with a base number and increases by one.

System

PageFaultCount
PeakWorkingSetSize (KB)
WorkingSetSize (KB)
QuotaPeakPagedPoolUsage
QuotaPagedPoolUsage
QuotaPeakNonPagedPoolUsage
QuotaNonPagedPoolUsage
PagefileUsage
PeakPagefileUsage

Standard Windows memory management statistics for the monitored process.

Total Execution Time

Cumulative execution time of transactions performed by the agent.

Connections

Jscomid

Unique identification number assigned to the Java Service Agent. You can start and kill JSCOM3 connections. Each started connection is issued a unique number. If you kill a connection, its number is retired. A new connection is assigned an entirely new Jscomid.

Number of Connections

Total number of clients connected to JSCOM3, both active and inactive.

Number of Active Connections

Total number of active client connections to JSCOM3.
**Last User**
Name of the user who executed the class.

**Last Executed Class**
Last executed Java class. This includes explicitly called Java classes (such as CALLJAVA), and implicitly called classes (such as GRAPH FILE).

**Displaying Aggregated Statistics for Java Services**
You can display aggregated statistics for all Java Services.

**Procedure: How to Display Aggregated Statistics for All Java Services**
1. From the menu bar, select *Workspace*.
2. In the navigation pane, right-click the *Java Services* folder, and select *Statistics*.
   
The Java Services Statistics pane opens on the right, as shown in the following image.

   ![Java Services Statistics](image)

   The table in *Aggregated Statistics for Java Services* on page 589 describes the statistics that are provided.

3. At the upper-right of the report pane, optionally click *Refresh Now* to refresh the statistics, or click the *Refresh interval* check box and type the number of seconds between automatic refreshes.

**Reference: Aggregated Statistics for Java Services**
The following aggregated statistics are provided for Java Services.

**Total Connections**
Total number of clients connected to JSCOM3, both active and inactive.

**Total Active Connections**
Total number of active client connections to JSCOM3.
Performing Administrative Tasks for Java Services

You can perform certain administrative tasks as you monitor Java Service activity.

- Reset aggregated statistics for Java Services.
- Stop or start one or more existing Java Service Agents.
- Stop or start all agents for a selected Java Service.
- Kill one or more Java Service Agents.
- Start one or more new Java Service Agents.

Procedure: How to Reset Aggregated Statistics for Java Services

You can clear aggregated Workspace Manager statistics for Java Services and start collecting them from the beginning.

1. From the menu bar, select Workspace.
2. In the navigation pane, right-click the Java Services folder, and select Reset Statistics.

Procedure: How to Stop an Individual Java Service Agent

1. Display the Performance Report for all Java Service Agents, as described in How to Display a Performance Report for All Java Service Agents on page 585.
2. Right-click the row for the individual Java Service Agent that you want to stop, and select Stop, as shown in the following image.

3. When asked if you want to continue to stop this JSCOM3 instance, click OK.

On the Performance Report, you will see the status stopping. If you click Refresh Now, you will see the status stopped.

Tip: You can restart the agent by right-clicking the applicable row on the Performance Report and clicking Start from the menu.
Procedure: How to Stop All Agents for a Selected Java Service

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Java Services folder.
3. Right-click the service whose agents you want to stop, for example, DEFAULT, and select Stop All.
4. When asked if you want to continue to stop all Java Service Agents, click OK.

Tip: You can restart the agents by right-clicking the service in the navigation pane, and clicking Start All from the menu.

Procedure: How to Kill One or More Java Service Agents

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Java Services folder.
3. Right-click the name of the service for which you want to kill agents, and select Kill Agents.
4. On the Kill Java Service Agents pane, type the number of agents that you want to kill, and click Kill.

On the Performance Report for all Java Service Agents, you will see that the number of agents that you specified is removed from the list.

Procedure: How to Start One or More New Java Service Agents

Use this method to start one or more additional agents, even when there are agents already running.

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Java Services folder.
3. Right-click the name of the service for which you want to start agents, and select Start New Agents.
4. On the Start New Java Service Agents pane, type the number of new agents to start for the selected service, and click Start.
On the Performance Report for all Java Service Agents, you will see that the new agents are listed, with the Status of starting, as shown in the following image.

### Monitoring Special Services and Listeners

From the Web Console, you can:

- Display a Performance Report for all Special Services and Listeners. The Performance Report displays statistics for the current list of Special Service processes and Listener processes monitored by the Workspace Manager.

- Display statistics for an individual Special Service or Listener.

- Display the Deferred List, which includes statistics and status for deferred requests.

- Display a Performance Report for all web sessions, or display statistics for an individual web session associated with an HTTP Listener.

As you monitor Special Service and Listener activity, you can also perform the following administrative tasks from the Web Console.

- Enable or quiesce certain Special Services or Listeners.

- Start or stop certain Special Services or Listeners.

- Kill all web sessions.

- View the log for a web session.

**Procedure:** How to Display a Performance Report for All Special Services and Listeners

1. From the menu bar, select **Workspace**.

2. In the navigation pane, right-click the **Special Services and Listeners** folder, and select **Processes**.
The Performance Report for all Special Services and Listeners opens on the right, as shown in the following image.

![Performance Report for All Special Services and Listeners](image)

The table in *Performance Report for All Special Services and Listeners* on page 593 describes the statistics displayed on the report.

3. At the upper-right of the report pane, optionally click *Refresh Now* to refresh the statistics, or click the *Refresh interval* check box and type the number of seconds between automatic refreshes.

*Reference:*  
*Performance Report for All Special Services and Listeners*

The following statistics appear on the Performance Report for all Special Services and Listeners.

**Name**
Type of Special Service (for example, FDS, DFM, or SCHEDULER), or type of Listener (for example, HTTP or TCP).

**Status**
Status of the Special Service or Listener. Possible values include active, not active, or stopped.

**Process ID**
Operating system specific process identification number associated with each Special Service or Listener running in a Workspace Manager address space.

**Port Number/Directory**
Port number or directory associated with the Special Service if applicable (for example, FDS port or DFM directory), or the port number associated with the Listener.

**Number of Requests**
Total number of requests processed by the Special Service or Listener.
CPU Time

Total CPU time used by the process, displayed as `hours:minutes:seconds.milliseconds` (for example, 0:00:05.625).

Memory Usage (KB)

Amount of memory, in kilobytes, used by the process.

**Procedure:** How to Display Statistics for an Individual Special Service or Listener

1. Display the Performance Report for all Special Services and Listeners, as described in *How to Display a Performance Report for All Special Services and Listeners* on page 592.
2. Right-click the row for the individual Special Service or Listener whose statistics you want to display, and select Statistics, as shown in the following image.

The Statistics pane opens. On this pane, you will see the statistics described in *Statistics for an Individual Special Service* on page 594 or *Statistics for an Individual Listener* on page 597.

**Tip:** You can also display the Statistics pane for FDS, HTTP, TCP or SOAP by expanding the `Special Services and Listeners` folder, right-clicking one of these Special Services or Listeners, and clicking Statistics from the menu.

**Reference:** Statistics for an Individual Special Service

The following statistics appear for an individual Special Service.

**General**

**Name**

Type of Special Service (for example, FDS, DFM, or SCHEDULER).

**Remark**

Additional property of the Special Service, where available.
State
Current state of the Special Service connection. Possible values are starting, active, stopping, or stopped.

Process ID
Operating system specific process identification number associated with the Special Service.

Port Number
Applies to the Special Service FDS.
Port number for the FDS. Numbering starts with a base number and increases by one.

Scanning
Applies to the Scheduler Special Services. Shows whether scanning is on or off.

System (Applies to the Special Services FDS and SCHEDULER)

PageFaultCount
PeakWorkingSetSize (KB)
WorkingSetSize (KB)
QuotaPeakPagedPoolUsage
QuotaPagedPoolUsage
QuotaPeakNonPagedPoolUsage
QuotaNonPagedPoolUsage
PagefileUsage
PeakPagefileUsage

Standard Windows memory management statistics for the monitored process.

Total Execution Time
Cumulative execution time of transactions performed by the agent.

Connections for FDS

Number of Connections
Total number of active connections.

Maximum Number of Connections
Hard-coded limit for the number of connections (512).
Number of FCB Blocks

Total number of opened File Control Blocks (FCB) by all users.

Maximum Number of FCB Blocks

Hard-coded limit for the number of opened FCBs at the sink side (4096).

Last User

User ID of the last connection to the FDS Service.

Last Executed HLI Commands

Last command executed by the FDS Service.

Connections for SCHEDULER

Status

Current status of the Scheduler. For example, scanning means that the Scheduler is in the process of scanning the application path for scheduled jobs, and ready means that the Scheduler is ready to process a job.

Last Full Scan

Timestamp for the last full scan of the application path. A full scan is performed on the Scheduler Start and Force Rescan options, which are available on the Scheduler menu.

Last Incremental Scan

Timestamp for the last incremental scan. An incremental scan looks for files that have changed since the last scan. The last scan can be full or incremental, depending on which one happened last.

Number of Scheduled Events

Number of jobs currently scheduled to run.

Number of Scheduled Runs

Number of all runs since the startup of the Scheduler.

Number of CMASAP Runs

Number of all jobs submitted through CMASAP since the startup of the Scheduler.

DFM for SCHEDULER

DFM_DIR Available Disk Space (KB)

Disk space, in kilobytes, in the directory dfm_dir that is available for the DFM Service write results of deferred requests.
Number of Requests Done Since Startup

Number of requests processed by the DFM Service since server startup.

Number of Responses Ready

Number of responses in the directory dfm_dir that are ready for a user to view (get).

Reference: Statistics for an Individual Listener

The following statistics appear for an individual Listener.

General

Name

Type of Listener, based on its network protocol (for example, HTTP or TCP).

Remark

Additional property of the Listener, where available. For example, an HTTP Listener can be CLM-enabled.

State

Current state of the Listener. Possible values include active, not active, and stopped.

Process ID

Operating system specific process identification number associated with the Listener.

Port Number

Port number for the Listener. Numbering starts with a base number and increases by one.

Total number of requests

Total number of requests processed by the Listener.
System
PageFaultCount
PeakWorkingSetSize (KB)
WorkingSetSize (KB)
QuotaPeakPagedPoolUsage
QuotaPagedPoolUsage
QuotaPeakNonPagedPoolUsage
QuotaNonPagedPoolUsage
PagefileUsage
PeakPagefileUsage

Standard Windows memory management statistics for the monitored process.

Total Execution Time
Cumulative execution time of transactions performed by the agent.

Setting a Web Session Timeout Warning
The server can post a warning about web session expiration before the session actually expires.

To set the number of minutes prior to session expiration that the warning displays:
1. On the Workspace tab, expand the Special Services and Listeners folder.
2. Right-click TCP/HTTP and select Properties of HTTP from the shortcut menu.
3. Expand the Sessions Control group, as shown in the following image.
4. Enter a number of minutes, \( n \), in the TIMEOUT_WARNING text box.

   By default, the value is zero (0), meaning that no warning will be displayed.

5. Click Save and Restart Server.

   The TIMEOUT_WARNING=\( n \) attribute is added to the odin.cfg file.

Responding to the warning message resets the session expiration timer.

**Deferred Lists**

The Deferred List displays the current status of all deferred requests. You can stop the queuing or execution of deferred requests, and remove requests from the queue.

**Procedure: How to Display the Deferred List**

1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Special Services and Listeners folder.
3. Right-click SCHEDULER, and select Deferred List.

The Deferred List is displayed on the right, as shown in the following image. In the image, the Get and Delete menu options for an individual row are shown.

Each row displays statistics for a procedure that has been submitted for deferred execution. For details about these statistics, see **Deferred List Statistics** on page 600.

4. All deferred requests are displayed by default. However, you can select the check box next to one or more deferred requests, then click Delete Selected, to remove those requests from the report.
Optionally, you can:

- Click Select All to select the check boxes for all deferred requests.
- Click Refresh Selected to refresh the status of the deferred request or requests whose check boxes are selected.

**Reference:** Deferred List Statistics

The following statistics appear on the Deferred List.

**Defer ID**
Unique identifier that the server assigns to each deferred request submitted.

**User ID**
ID of the user who requested deferred execution of the named procedure.

**Status**
Can be one of the following: Ready, Queuing, Executing, Agent crashed, Connect failed, Exceed limit, or Unknown.

**App**
Name of the application that contains the procedure being run in deferred mode.

**Procedure**
Name of the procedure being run in deferred mode.

**Submitted Time**
Time at which the request for deferred execution was submitted.

**Scheduled Time**
Time at which the deferred request is scheduled to run.

**Days Left**
Number of days that the generated report will be kept on the server.

**Procedure:** How to Retrieve the Answer Set for a Deferred Request

1. On the Deferred List, right-click a row for a deferred request whose status is Ready.
2. From the menu, click Get to retrieve the answer set for the deferred request in that row. The output is displayed on the right.
**Procedure:** How to Delete a Deferred Request From the Queue

Click anywhere in a row for a deferred request, and from the menu, click Delete.

**Tip:** To delete multiple rows, click the check box next to the rows that you wish to delete. Then, click the *Delete Selected* button.

**Web Sessions**

You can display a Performance Report for all web sessions and statistics for a single web session.

**Procedure:** How to Display a Performance Report for All Web Sessions

1. From the menu bar, select *Workspace*.
2. In the navigation pane, right-click the *Workspace* folder, and select *Web Sessions*.
   
   or

   In the navigation pane, expand the *Special Services and Listeners* folder, right-click *TCP/HTTP*, and select *Web Sessions*, as shown in the following image.

![Web Sessions menu](image)

The Performance Report for all web sessions opens on the right.

The table in *Performance Report for All Web Sessions* on page 602 describes the statistics displayed on the report.
3. At the upper-right of the report pane, optionally click Refresh Now to refresh the statistics, or click the Refresh interval check box and type the number of seconds between automatic refreshes.

**Reference:**  **Performance Report for All Web Sessions**

The following statistics appear on a Performance Report for all web sessions.

**Web Session Number**

Unique number assigned to a web session at logon to the server until the end of the session. The session ends by logging off the server or by closing the browser.

**Web Session ID**

A unique number that the server assigns to a specific user for the duration of the user session. Every time you connect to the Web Console, a new session number is assigned.

**User**

ID of the connected user.

**Remote Address**

IP address or machine on which the web browser running the Web Console resides.

**Login Time**

Time at which the web session originated.

**Last Access Time**

Last time at which the user was active in this web session.

**Authentication**

Mechanism that performs user authentication at the time the web session is created.

**Console Message Count**

Number of messages that a user received in this session.

**Procedure:**  **How to Display Statistics for an Individual Web Session**

1. Display the Performance Report for all web sessions, as described in How to Display a Performance Report for All Web Sessions on page 601.

2. Right-click the row for the individual web session whose statistics you want to display, and select View Statistics.

The Web Session Statistics pane opens.
The table in *Statistics for an Individual Web Session* on page 603 describes the statistics displayed on the pane.

**Reference:** *Statistics for an Individual Web Session*

The following statistics appear for an individual web session.

**Web Session Number**

Unique number assigned to a web session at logon to the server until the end of the session. The session ends by logging off the server or by closing the browser.

**User ID**

ID of the connected user.

**Number of Requests**

Number of HTTP requests processed during the current web session.

**User Login Time**

Time at which the web session originated.

**Last Access Time**

Last time at which the user was active in this web session.

**Login Type**

Type of user logon, for example, explicit or cookie.

**HTTP User Agent**

Standard HTTP client that is used for connection to the HTTP Listener.

**URI**

Uniform Resource Identifier (URI) of the last Web Console page that was processed by the current web session.

**Remote Address**

IP address or machine on which the web browser running the Web Console resides.

**Web Session ID**

A unique number that the server assigns to a specific user for the duration of the user session. Every time that you connect to the Web Console, a new session number is assigned.
Performing Administrative Tasks for Special Services and Listeners

You can perform several administrative tasks for Special Services and Listeners.

- Enable or quiesce certain Special Services or Listeners.
- Start or stop certain Special Services or Listeners.
- Kill all web sessions.
- View the log for the web session.

Procedure: How to Stop a Special Service or Listener

Stop is only available for certain special services.

1. Expand the Special Services and Listeners folder in the navigation tree.
2. Right-click a Special Service or Listener.
3. Select Stop to stop the service.

The Performance Report or statistics pane reflects the stopped status. A Start option is added to the right-click menu for the service.

Procedure: How to Kill All Web Sessions

1. Display the Performance Report for all web sessions, as described in How to Display a Performance Report for All Web Sessions on page 601.
2. Near the top-left of the report, click Kill All Web Sessions, as shown in the following image.

   ![Web Sessions Table]

Procedure: How to View the Log for a Web Session

1. Display the Performance Report for all web sessions, as described in How to Display a Performance Report for All Web Sessions on page 601.
2. Right-click the row for the web session whose log you want to view.
3. From the menu, click View Session Log.
For more information, see *Showing the Session Log* on page 662.

**Custom Pages**

Custom Pages let you create pages that monitor the various services available from the Workspace folder, as well as run procedures. These pages are represented by icons on the navigation pane of the Applications page.

Custom Pages allow you to include multiple monitoring pages on a single page, creating a combination of Data Agents, Java Services, Listener and Special Services, Cluster Manager, and Resource Management pages. They also allow you to include procedures that generate reports. These pages and reports can be arranged horizontally, vertically, or in a cascade. Refresh and autorefresh will update all sections of a Custom Page. Custom Pages can be saved in a server application for future use.

**Note:** Custom Pages are only supported when the appearance of the Web Console is set to an RIA option.
Procedure: How to Create Custom Pages

Custom Pages are created in Application directory folders.

1. From the Application page, select New and Custom Page, as shown in the following image.

   ![Image of New and Custom Page options]

   The Custom Page workspace opens, as shown in the following image.

   ![Image of Custom Page workspace]

2. To add a monitor page, click Add Workspace.

   The Select Page(s) to Add dialog box opens, showing the Monitor Pages folders.

3. Open the Monitor Pages folders and select an item to add.
The monitor page is added to the Selected Page(s) field, as shown in the following image.

4. Click OK.
   
The monitor page is added to the workspace.

5. To add a procedure, click Add Procedure.
   
The Select Page(s) to Add dialog box opens, showing the application folders.

6. Open an application folder and click a procedure.
The procedure is added to the Selected Page(s) field, as shown in the following image.

7. Click OK.

The procedure is added to the workspace.
8. You can continue adding monitor pages and procedures. When you are finished, use the Arrange Windows button to position the pages. The windows can be arranged Horizontally, Vertically, In a Cascade, or Automatically, as shown in the following image.
9. Click the Save As button.

The Save Custom Page opens.
10. Select an Application folder and enter a name in the corresponding fields, and click Save.

Optionally, you can replace an existing page by selecting the Overwrite existing file check box.

You can add other pages at any time using the Add Workspace or Add Procedure button.
The Custom Page is added to the Application folder. Right-click and select Open to open the page.
The following section describes how to manage listeners and special services.

**In this chapter:**

- Using the Listeners and Special Services Configuration Panes
- Special Services
- Listeners

### Using the Listeners and Special Services Configuration Panes

The server provides special services and listeners, which are available from the Special Services and Listeners folder of the Workspace navigation pane.

In most instances, there is no need to alter the default configurations for these features.

### Special Services

The special services are:

- **FDS.** FOCUS Database Server.
SCHEDULER. The Scheduler is used to schedule flows and stored procedures, and to manage deferred requests and reports.

Running and Configuring the FOCUS Database and FOCUS Database Server

The server supports its own internal database known as a FOCUS Database, and includes its own FOCUS Database Server, also called a Sink Machine, for multi-user use. Sites running z/OS have the option of using the integrated FOCUS Database Server or keeping their FOCUS files on a legacy FOCUS Database Server, which runs as a separate batch job.

In many simple cases, syntax, such as ON TABLE HOLD AS MYAPP/MYDATA FORMAT FOCUS, will generate all that is needed for proper initial creation internally. However, more precise creations require a USE statement. On z/OS, a DYNAM or a JCL DD is also required, and the USE syntax will vary if a legacy database server is in use.

The general syntax of the USE statement is:

```
USE
XXX [NEW]
ZZZ [ON server]
XXX01 AS XXX [ON server] READ
XXX02 AS XXX [ON server] READ
{path}AAA.foc AS AAA [ON server]
{path}BBB.foc AS BBB NEW
{app}/CCC AS CCC [ON server]
{app}/AAA AS AAA NEW
END
```

The AS phrase effectively allows you to access a file under an alternate name, with a different Master File or synonym, but it also allows you to concatenate the access of data partitioned as separate files. The AS phrase is also required syntax for path and app use. Syntax using full-path, native file names is only applicable to non-z/OS platforms (z/OS uses DYNAMs or DD names to point at specific datasets).

The NEW parameter indicates that the file is being specified for creation purposes (CREATE FILE). Creates may not be done on a database server. They must be done independent of the server and then placed under server access.

The ON phrase indicates the use of a database server. On z/OS, the choices for server names are FOCSU01 (server integrated) or FOCSBS (FOCUS legacy). All other platforms use the server name FOCSU01. The FOCSU01 node is a pre-configured and reserved name for the integrated FOCUS Database Server and may not be used for any other purposes. The server communication file (ODIN), can be configured to support additional FOCUS Database Server nodes and/or have additional nodes that point to the nodes of FOCUS Database servers configured under other servers.
When using an AS phrase in conjunction with an ON phrase for files where the physical name (not including path or extension) and the AS name do not match, the READ parameter is required to prevent an unintended opening for write.

**Important:** On z/OS, a single file cannot be accessed by both a legacy and an integrated FOCUS Database Server. You must select one or the other to manage access or you will encounter queue conflicts.

**Example:** Using the Integrated FOCUS Database Server From a Global Server Profile (suprof.prf or edasprof.prf)

Using the Web Console, edit either suprof.prf (preferred) or edasprof.prf (alternative). On z/OS, add DYNAM ALLOC allocations and USE statements. On other platforms, only add USE statements.

For example, use the following syntax to enable the FOCUS Database Server to control access to the CAR data source.

**On z/OS:**

```
DYNAM ALLOC FI CAR DA dsnname SHR REU
USE
CAR ON FOCSU01
END
```

**On other platforms:**

```
USE
CAR ON FOCSU01
END
```

**Example:** Using the Integrated FOCUS Database Server With a JCL Statement (z/OS Only)

IRUNJCL JCL allocation

Add JCL statements for the FOCUS files to be managed, for example:

```
//CAR        DD DISP=SHR,DSN=dsnname
```

The following sample USE command enables the FOCUS Database Server to control access to the CAR data source:

```
USE
CAR ON FOCSU01
END
```
Example: Using the Integrated FOCUS Database Server From Other Profiles or in a Procedure (FOCEXEC)

The syntax is similar when used in a profile, but on z/OS, the DYNAM uses the PERM option and is equivalent to a JCL allocation using IRUNJCL JCL.

For example, use the following syntax to enable the FOCUS Database Server to control access to the CAR data source:

**On z/OS:**

```plaintext
DYNAM ALLOC FI CAR DA dsname SHR PERM
USE
CAR ON FOCSU01
END
```

**On other platforms:**

```plaintext
USE
CAR ON FOCSU01
END
```

Example: Using the Legacy FOCUS Database Server (Separated Batch Job, z/OS Only)

The following sample code identifies a legacy FOCUS Database Server using the odin.cfg node block FOCSBS:

```plaintext
USE
CAR ON FOCSBS
END
```

This sample node block resides in odin.cfg and can be constructed using the Web Console:

```plaintext
NODE=FOCSBS <==== USS server (odin.cfg file)
BEGIN
    SUBSYS = xyzw <==== optional parameter to specify IBI subsystem name
    (not needed if you are using the name IBIS)
    PROTOCOL=SBS
    CLASS=SUCLIENT
    PORT=X.Y.Z <==== communications dataset
END
```

The Scheduler and Deferred Service

You can configure the settings that are used to manage the Scheduler and deferred requests and reports from the Web Console Scheduler Configuration pane. The parameters are stored in the edaserve.cfg file. You can also view and configure the Scheduler Agents page.
**Procedure:** How to Display and Customize the Scheduler Agents Page

1. From the menu bar, select *Workspace*.

2. From the ribbon, click the *Scheduler Agents* icon, or expand the *Special Services and Listeners* folder in the navigation pane, right-click *SCHEDULER*, and select *Scheduler Agents*.

   The Scheduler Agents page opens.

3. To customize the columns that appear on the page, click *Choose Columns*.

   Select the check boxes for the columns you want to appear, as shown in the following image.

   ![Scheduler Agents Columns](image)

4. Click *OK*.

5. To customize the states that appear on the page, click *Choose States*.
All states appear by default. Deselect the check boxes for the states you want to remove, as shown in the following image.

6. Click OK.
7. To activate or deactivate a Scheduler agent, select the check box and click Activate Selected or Deactivate Selected.

Reference: **Scheduler Agent Columns**

You can add the following columns to the Scheduler Agents page.

**General**

<table>
<thead>
<tr>
<th>Category/Title</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>ID</td>
<td>Identification number associated with the scheduler agent</td>
</tr>
<tr>
<td>State</td>
<td>The current state of the scheduler agent (Starting, Scheduled, Running, Failed, Killed, Killing, Quiesced, Quiesced)</td>
</tr>
<tr>
<td>Application</td>
<td>Application name of the scheduled procedure</td>
</tr>
<tr>
<td>Procedure</td>
<td>Name of the scheduled procedure</td>
</tr>
<tr>
<td>User ID</td>
<td>User credentials used to run the scheduled procedure</td>
</tr>
</tbody>
</table>

ID

Identification number associated with the scheduler agent.
**State**

The current state of the scheduler agent (Starting, Scheduled, Running, Failed, Killed, Killing, Quiesced, Quiescing, Inactive, Reloading, or Done).

**Application**

Application name of the scheduled procedure.

**Procedure**

Name of the scheduled procedure.

**User ID**

User credentials used to run the scheduled procedure.

**Schedule**

- **Status**: The current status for this procedure (Active or Inactive).
- **Schedule Type**: The schedule type for this procedure (Run Once, Recurring, Multi-Day, Run when server starts, CMASAP, CMASAP Iterator, or CMASAP Iterator Group).
- **Start Date/Time**: The initial start date and time for the schedule.
- **End Date/Time**: The date and time on which this schedule expires.
- **Intraday Start**: The start time of the intraday restriction interval.
- **Interval**: For recurring schedules, the number of minutes, hours, days, weeks, months or years between runs.
- **Days of week**: The days of the week on which the schedule will run.
- **Days of month**: The days of the month on which the schedule will run.
Intraday End

The end time of the intraday restriction interval.

Interval

For recurring schedules, the number of minutes, hours, days, weeks, months, or years between runs.

Days of week

The days of the week on which the schedule will run.

Days of month

The days of the month on which the schedule will run.

E-Mail

<table>
<thead>
<tr>
<th>E-Mail</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>E-Mail on Failure</td>
<td>Shows an e-mail address where confirmation will be sent on failure of each scheduled run</td>
</tr>
<tr>
<td>E-Mail on start</td>
<td>Shows an e-mail address where confirmation will be sent on start of each scheduled run</td>
</tr>
<tr>
<td>E-Mail on completion</td>
<td>Shows an e-mail address where confirmation will be sent on completion of each scheduled run</td>
</tr>
</tbody>
</table>

E-Mail on Failure

The email address where confirmation will be sent on failure of each scheduled run.

E-Mail on start

The email address where confirmation will be sent on start of each scheduled run.

E-Mail on completion

The email address where confirmation will be sent on completion of each scheduled run.

Statistics

<table>
<thead>
<tr>
<th>Statistics</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Run Time</td>
<td>The time of the last scheduled run</td>
</tr>
<tr>
<td>Next Run Time</td>
<td>The time of the next scheduled run</td>
</tr>
<tr>
<td>Tscmid</td>
<td>The identification number for the data service agent running the scheduled procedure</td>
</tr>
<tr>
<td>Job ID</td>
<td>The job ID</td>
</tr>
<tr>
<td>Parent Job ID</td>
<td>The parent job ID</td>
</tr>
</tbody>
</table>

Last Run Time

The time of the last scheduled run.

Next Run Time

The time of the next scheduled run.
Tscomid

The identification number for the data service agent running the scheduled procedure.

Job ID

The job ID.

Parent Job ID

The parent job ID.

Reference:  Scheduler Agent States

By default, the Scheduler Agents includes all states. You can removes the following states to limit what is displayed on the page.

Main states

SCHEDULED

The agent is waiting for its next scheduled run time. When it arrives, the agent attempts to establish a connection with a tscom3 agent to execute the scheduled procedure. When a connection is established, the agent enters the RUNNING state. The agent may transition into the FAILED state if a problem occurs. The administrator may set the agent to transition into the QUIESCED state by issuing a 'Quiesce Agent' request.

INACTIVE

An idle state. The procedure has been marked inactive. No action is required.

DONE

An idle state. The agent will not run because the scheduled end time has passed. The operation is complete and no further action will be initiated by the agent.

RUNNING

A connection has been established with a tscom3 agent to execute the procedure, which has begun to execute. Attempting to kill this agent will kill the underlying tscom3 agent process and cause a transition to the KILLED state. A critical error, such as a lost or broken connection, will move the agent into the FAILED state.

FAILED

A critical error occurred while the agent was trying to connect to a tscom3 agent or while executing the procedure. Administrator action is required to move the agent out of this state. Removing a FAILED agent forces a re-scan and creates a new agent for the procedure.
QUIESCED
The agent has been placed in this state by an administrator request to stop a SCHEDULED agent. No connection exists between this agent and a tscom3 agent. Without administrator action, the agent will remain in this state permanently. To transition from this state, the administrator must remove the agent. This forces a re-scan and creates a new agent for the procedure.

KILLED
The agent has been placed in this state by an administrator request to kill a RUNNING agent. The underlying tscom3 process has been killed. No active connection exists between this agent and tscom3. Without administrator action, the agent will remain in this state permanently. To transition from this state, the administrator must remove the agent. This forces a re-scan and creates a new agent for the procedure.

Transitional states

STARTING
The agent should successfully pass through this state into a SCHEDULED, DONE, INACTIVE, or FAILED state, with no intervention.

QUIESCING
The agent will transition from this state into a QUIESCED state, with no intervention.

KILLING
The agent should successfully pass through this into a KILLED state, with no intervention.

RELOADING
A RELOAD AGENT request was received to reload a QUIESCED, DONE, FAILED, KILLED, or INACTIVE agent. The agent should successfully pass through this state into a SCHEDULED, DONE, INACTIVE, or FAILED state, with no intervention.

RESTARTING
The scheduled agent has failed, but is automatically restarting because of the sched_restart_failed option. The agent transitions into a RUNNING state after sched_restart_interval seconds.

Procedure: How to Set Scheduler and Deferred Management Properties
1. From the menu bar, select Workspace.
2. In the navigation pane, expand the Special Services and Listeners folder.
3. Right-click SCHEDULER, and select Properties.
The Scheduler Configuration page opens. The page has Scanning, Execution, Logging and Output, and E-Mail Notification sections.

4. To set properties for the Scheduler or for deferred execution of requests, enter values in the corresponding fields.

5. Click Save and Restart Scheduler.

Reference: Scheduler Scanning Properties

The Scheduler Scanning properties are shown in the following image.

```
Scheduler Configuration

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>sched_autostart</td>
<td>Y</td>
</tr>
<tr>
<td>dfm_autostart</td>
<td>Y</td>
</tr>
<tr>
<td>dfm_app</td>
<td>Physical location in &lt;dfm_dir&gt;</td>
</tr>
<tr>
<td>dfm_dir</td>
<td>C:\bin\env99\wfs\dfm_dir</td>
</tr>
</tbody>
</table>
```

**sched_autostart**

If set to y, scanning for scheduled events is started when a Scheduler service starts. If a service is not running, turning on sched_autostart will not make scanning available.

If set to n, a user may still start the scanning manually using the Force Scheduler Scan option.

Depending on the number of files in the application path, sched_autostart may affect server performance.

The default value is n.

**dfm_autostart**

If set to y (the default), the DFM listener/Scheduler Service is started with the server. If it is set to n the Service does not start automatically on server start. The user can start the Scheduler manually.

**dfm_dir**

Defines the location where deferred requests and responses are stored. This is ignored if dfm_app is set.

**dfm_app**

Defines the application name where deferred requests and responses are stored.
**Reference:** Scheduler Execution Properties

The Scheduler Execution properties are shown in the following image.

![Scheduler Execution Properties](image)

**sched_service**

defines the agent service the DataMigrator Scheduler will use when running DM flows. If this keyword is not set, the DEFAULT service will be used.

**sched_restart_interval**

Specifies the time interval in seconds between restart attempts for all restartable flows. The default value is 60 seconds.

**sched_restart_failed**

Determines whether scheduled agents will be restarted after they fail. The valid values are:

- **n** - Failed agents will be restarted at most \( n \) times.
- **0** - Failed agents will not be restarted.
- **-1** - Failed agents will be restarted infinitely.

The default value is **-1**.

**CMASAP_clear_interval**

Specifies how often (in seconds) CMASAP agents are removed from the agents list. The default value is **-1**, meaning never.
Reference: Scheduler Logging and Output Properties

The Scheduler Logging and Output properties are shown in the following image.

<table>
<thead>
<tr>
<th>Property</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>sched_log_lines</td>
<td>20</td>
</tr>
<tr>
<td>sched_standalone_log</td>
<td></td>
</tr>
<tr>
<td>sched_dmlog_app</td>
<td>Default location in catalog</td>
</tr>
<tr>
<td>sched_log_commit_interval</td>
<td>10</td>
</tr>
<tr>
<td>sched_log_commit_maxlines</td>
<td>1000</td>
</tr>
<tr>
<td>Merge formatted output into log</td>
<td></td>
</tr>
<tr>
<td>dfm_maxage</td>
<td>30</td>
</tr>
<tr>
<td>dfm_maxoutput</td>
<td>0</td>
</tr>
</tbody>
</table>

**sched_log_lines**

Defines the maximum number of lines per request that the Scheduler will write to the log. When this number of lines is reached, logging stops. Exceeding this limit for one request does not affect logging for other requests.

When set to -1, the number of lines is unlimited. When set to 0, logging is disabled. The default value is -1.

**sched_standalone_log**

If checked, generates a separate log file for each job.

**sched_dmlog_app**

Is the name of the application in which the scheduler separate log and statistics files are located.

**sched_log_commit_interval**

Specifies the maximum time interval in seconds that can elapse before log data is committed to the log. Used in conjunction with sched_log_commit_maxlines, these settings can fine-tune Scheduler logging behavior. The logging subsystem will commit data to the log whenever one of these maximums has been reached. Finding the best commit interval is a compromise among latency (the delay between the time a log message is received and when it is committed to the log database), reliability, and performance. Longer intervals enable greater I/O efficiency, but increase the potential amount of log information lost in a crash. The default value is 10.
sched_log_commit_maxlines

Specifies the maximum number of log lines to collect before committing them to the log. Used in conjunction with sched_log_commit_interval, these settings can fine-tune Scheduler logging behavior. The logging subsystem will commit data to the log whenever one of these maximums has been reached. Larger numbers enable greater I/O efficiency, but increase the potential amount of log information lost in a crash. The default value is 1000.

Merge formatted output into log

Changes value of sched_log_output_destination keyword.

When checked, it specifies that only the job Log is stored in the Scheduler log (sched_log_output_destination=Log). The output is stored in the dfm_dir location.

When unchecked, it specifies that the job Log and Output are stored in the Scheduler log (sched_log_output_destination=LogAndOutput).

dfm_maxage

Defines the maximum number of days that deferred reports are kept in the server after they are created. The value zero (0) means the age is unlimited. The default value is 30.

dfm_maxoutput

Defines the maximum size in kilobytes of a deferred report. Reports that over this limit will be removed.

On z/OS PDS deployment, the number represents a number of records. The valid value is any number between 0 and 15,728,688 inclusive.

On all other platforms, the number represents a number of kilobytes or megabytes with the suffix K or M. A valid value is any number between 0 and 65535 inclusive.

The default value is zero (0), which means the output is unlimited.
**Reference:** Scheduler E-Mail Notification Properties

The Scheduler E-Mail Notification properties are shown in the following image.

**On Start**
- Sends email when the procedure starts.

**On Completion**
- Sends email when the procedure completes.

**On Failure**
- Sends email if the procedure fails.

**sched_email_address**
- Defines the list of email recipients. The list can contain one or multiple email addresses and/or user IDs. Multiple entries should be separated by semicolons (;).

**dfm_email**
- When checked, the scheduler Email Notification settings are applied to deferred requests. The default is unchecked, which does not apply the scheduler email settings to deferred requests.
**dfm_email_from_userid**

When the response of a deferred request is ready to be retrieved, an email notification can be sent to a specific email address. If this keyword is set to n, no email notification will be sent. If it is set to y and there is no email address specified in the deferred request, an email notification will be sent to the email address of the requestor specified in the admin.cfg configuration file or in the corresponding security provider. The default value is n.

**Procedure:  How to Manage Tenants**

This option lets you manage Scheduler User IDs used by the Scheduler for scanning (sched_scan_id) and running scheduled jobs (sched_run_id).

1. In the Special Services and Listeners folder of the Workspace page, right-click Scheduler and select *Manage Tenants*.

   The *Manage Scheduler Userids* page opens, as shown in the following image.

   ![Manage Scheduler Userids](image)

2. To add a new user or run ID, click *New* on the menu bar.
The New Tenant dialog box opens, as shown in the following image.

Select values for the following parameters.

**ScanID**
- Determines what user ID the DM scheduler uses to scan the application path for scheduled DM flows. This can be used to restrict the set of application directories scanned by the scheduler to a subset of the APP PATH of the effective administrator. Select a user from the drop-down list. This sets sched_scan_id.

**Type**
- Can be one of the following.
  - `<server_admin_id>`. This is the default value.
    - Setting sched_run_id to `<server_admin_id>` uses the first valid Server Administrator user ID defined in admin.cfg to run the DM job by the Scheduler. Usually this would be the effective Server Administrator.
  - `<user>`. Setting sched_run_id to `<user>` uses the user ID from the DM job to run the job by the Scheduler.
  - **RunID.** If you select this option, a RunID field opens. You must select a user from this list. This value determines what user ID a DataMigrator flow uses to run scheduled flows, either server_admin_id or user.

**Note:** DM flows submitted from the Data Management Console, the Web Console or CMRUN are run under the userid that submits the flow.
3. Click OK.

The ID is added to the Manage Scheduler Userids page.

The pairs of sched_scan_id and sched_run_id are written to edaserve.cfg as follows:

```plaintext
sched_scan_id = PTH\srvadmin
BEGIN
  sched_run_id_type = server_admin_id
END

or

sched_scan_id = PTH\scanid1
BEGIN
  sched_run_id_type = user
END

or

sched_scan_id = PTH\scanid2
BEGIN
  sched_run_id_type = PTH\runid1
END
```

Multiple sched_scan_id and sched_run_id pairs or tenants can be defined. During scanning, the Scheduler will use each tenant sched_scan_id to scan and update the Scheduler.

If multiple tenants have the same application in the sched_scan_id APPPATH, the jobs from this application will be scheduled only once, by the first tenant used during scanning.

4. To delete a tenant, select one from the list and click Delete.

5. To edit a tenant, select one from the list and click Properties.

6. When you are finished, click OK.

**Procedure: How to View Deferred Process Statistics**

1. From the menu bar, select Workspace.

2. In the navigation pane, expand the Special Services and Listeners folder.

3. Right-click SCHEDULER, and select Statistics.

   The Statistics SCHEDULER page displays the following information in the DFM section:

   - DFM_DIR Available Disk Space (KB)
   - Number of Requests Done Since Startup
Number of Response Ready

For more information, see Statistics for an Individual Special Service on page 594.

Reference: Extensions for Deferred Files

The following table lists possible extensions for the deferred files listed in the dfm_dir directory.

<table>
<thead>
<tr>
<th>Extension</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>RQO</td>
<td>Request file.</td>
</tr>
<tr>
<td>RQD</td>
<td>Data file. Contains user ID, optional flags, and so on.</td>
</tr>
<tr>
<td>RQP</td>
<td>Request is being executed.</td>
</tr>
<tr>
<td>RQF</td>
<td>Request is waiting to be executed.</td>
</tr>
<tr>
<td>DEL</td>
<td>Request is deleted.</td>
</tr>
<tr>
<td>RPO</td>
<td>Response file. Contains the whole report for one request.</td>
</tr>
<tr>
<td>RPF</td>
<td>Response is ready.</td>
</tr>
<tr>
<td>RPE</td>
<td>Response exceeds maximum limit.</td>
</tr>
</tbody>
</table>

Forcing a Scheduler Scan

A scheduler scan is initiated on server startup, if sched_autostart=y. In addition, the scheduler is updated for a procedure if you edit schedule information for a procedure or DataMigrator job using Manage Schedule and Email from the Web Console or DMC. At other times, you can force scanning of scheduler and deferred jobs in the following ways.

- On the Applications page, click the Schedule/E-Mail button on the ribbon and select Force Scheduler Scan.
- On the Workspace page, open the Special Services and Listeners folder, right-click Scheduler, and select Force Scheduler Scan.
- Issue the following command in the server command window.

`edastart -forcescan`
Storing Deferred Reports in an Application Directory or an SQL Repository

Deferred requests and reports can be written to any application, including applications that are stored in an SQL repository.

To route deferred requests to any application:

1. Sign on to the server with a server administrator ID.
2. On the Workspace menu, expand Special Services and Listeners.
3. Right-click SCHEDULER, and select Properties from the shortcut menu.
   
   The Scheduler Configuration page opens.

   By default, dfm_app is set to a physical directory location.

4. You can accept or edit the dfm_dir location or select an application from the dfm_app drop-down list, as shown in the following image.

   ![Scheduler Configuration](image)

   If you select an application, it will override the directory identified in dfm_dir, and the dfm_dir text box will be hidden.

5. Click Save and Restart Scheduler.

Deferred requests and output will be returned to that application

Listeners

The listeners are:

- HTTP
- TCP
- SOAP

These listen for activity on their respective ports.
Note: To include a SOAP listener, you need to configure one. For more information, see How to Configure a SOAP Listener on page 638

Configuring Listeners

All listeners have the same type of basic parameters. They differ in the additional parameters that are available. All three types have Security parameters. HTTP also includes Sessions Control, Aliases and Miscellaneous Settings.

Procedure: How to Configure a Listener

1. From the menu bar, select Workspace.
2. Open the Special Services and Listeners folder in the navigation pane.
3. Right-click a listener and select Properties.
   The Listener Configuration page opens.
4. In the Basic section, you can enter a value for the HOST parameter.
5. If you need to set additional parameters, expand the corresponding section and enter values in the parameter fields.
6. Click Save and Restart Server.

Reference: Listener Basic Parameters

The HTTP, TCP, and SOAP listeners have the same type of basic parameters.

NODE

Defines the logical name of a node block. The settings are:

For HTTP - LST_HTTP.
For TCP - LST_TCP.
For SOAP - LST_SOAP.

PORT

Defines the port number that a listener is listening on. The default value for the HTTP listener is 8117. The default value for the TCP listener is 8116.

HOST

Defines an IP address that a listener is listening on. If blank, the listener will listen on all IP addresses.
Additional Listener Parameters

Reference: The HTTP, TCP, and SOAP listeners have the following security parameter:

RESTRICT_TO_IP

Defines the name of a host or IP address(es) that will be accepted by the listener. The syntax is:

hostname, xxx.xxx.xxx.xxx, yyy.yyy.yyy, ...

The address must be in base 256 standard dot notation. For platforms that support IPv6, IPv6 notation can be used if it is enabled (for example, 2001:1b1:719:1b1:203:baff:fe0a:fe23)

The internal default is *.*.*.*, which allows all IP addresses.

Note: You can use a wildcard to mask an entire section of the address, as in the following examples:

172.204.201.*  
172.*.*.*  
172.204.*.*  

Partial masking is not supported, for example:

172.204.201.1*  
172.204.201.*23

The HTTP listener has the following additional parameters:

Security

SECURITY

Defines the authentication protocol used by a secured listener. The valid values are:

☐ IWA - for NTLM protocol.

☐ KERBEROS - for Kerberos protocol.

LOGIN_FAILURE

Defines the type of message shown for a login error. The valid values are:

0 - Shows a general error message.

1 - Shows a precise error message.

The default value is 0.
LOGIN_HIDE_PROVIDERS

Defines whether available security providers or domains should be shown in the login screen. The valid values are:

- 0 - shows all available security providers or domains.
- 1 - hides all available security providers or domains.

CSRF_TOKEN

Defines whether a secret token should be used in all form submissions. This is used to prevent cross-site request forgery attacks. The valid values are:

- 0 - disable CSRF token.
- 1 - enable CSRF token.

SANITIZE_PARAMETERS

Defines whether the HTTP listener should sanitize all submitted form parameters. Valid values are zero (0) to disable sanitizing of form parameters, or 1 to enable sanitizing of form parameters. The default value is 1.

X_FRAME_OPTIONS

Defines whether a browser should be allowed to render the Web Console in a frame. Valid values are:

- NONE. This is available for the HTTP Listener only. The Web Console can be displayed in a frame.
- DENY. The Web Console cannot be displayed in a frame.
- SAMEORIGIN. The Web Console can only be displayed in a frame on the same origin as the page itself. This is the default value.

Enable HTTPS

Enables HTTPS support, either for OpenSSL or Microsoft Windows SSL.

Both types have the following additional parameters:

SSL_CERTIFICATE

Defines the SSL certificate. The sample certificate name provided by Information Builders for testing purposes for Microsoft SSL is iwaycert.p12.

SSL_PASSPHRASE_E

If the private key of the certificate is encrypted, an encrypted passphrase must be provided to decrypt the private key.
**Note:** The sample certificate provided by Information Builders as described under the SSL_CERTIFICATE parameter above contains an encrypted key. The passphrase for this sample certificate is 1234567.

The following additional parameters are specific to OpenSSL:

**SSL_PRIVATE_KEY**

Defines the file that contains the private key for the listener. It must correspond to the public key embedded in the PEM certificate and must be in PEM format.

**SSL_CA_CERTIFICATE**

Defines the file containing the trusted CA certificate in PEM format. It is used to verify the client certificate. If the client fails to send the certificate or if verification fails, connections will be rejected. More than one CA certificate may be present in the file.

The following additional parameter is specific to Microsoft SSL:

**SSL_FRIENDLY_NAME**

Indicates a name used to identify the certificate in the PKCS#12 file, if the file contains more than one certificate.

**SSL_AUTH_CLIENT**

Defines whether client authentication should be enabled. Valid values are:

- **0 (zero).** The Client is not asked for a certificate. There is no client authentication. This is the default value.

- **1.** The server requests a certificate from the client. All received certificates are validated. If the client fails to send a certificate or verification fails, connections will be rejected.

**Sessions Control**

**PERSISTENT_GLOBAL**

Defines whether global FOCUS variables will be persistent within a browser session. The valid values are:

- **0** - Global variables are not persistent within a browser session.

- **1** - Global variables are persistent within a browser session.

The default value is 0.
PASS_EXPIRE_NOTIFICATION
Determines whether users receive a password expiration notification by defining the number of days before expiration at which a notification will occur. The default value is 0, meaning no notification.

MAX_WEBSESSION
Defines the maximum number of active sessions. The HTTP listener will reject connections to the Web Console if this number is reached. The default value is 0, meaning no limit.

TIMEOUT_WARNING
Defines how many minutes before session expiration a warning message will be displayed. The default value is zero (0), which means there is no timeout warning message.

LOG_LAST_REQUESTS
Defines the maximum number of last requests in a session that will be collected as statistics. The default value is 10.

Alias

IBI_HTML
Defines a URL alias for the primary file lookup directory. Lookup is performed first in the directory described by this alias. The default value is $EDAHOME/etc.

HTML_HOME
Defines a comma-delimited list of directories for file lookup. Directories are searched in the order in which they appear in this list.

SESSION_EXPIRATION
This parameter has been deprecated and has been combined with the foccache_maxage parameter, in order to make sure that no foccache files remain when the session has expired. For more information about the foccache_maxage parameter, see Application Settings.

Miscellaneous Settings

DEFAULT_HOST
Defines the preferred hostname or IP address for the listener when a listener has multiple IP addresses or hostnames.

PROXY_SERVER
Runs the HTTP Listener as a proxy server. The valid values are:
0 - Proxy server for the HTTP protocol is off.
1 - Proxy server for the HTTP protocol is on.

The default value is 0.

**Procedure: How to Configure a SOAP Listener**

A SOAP listener needs to be configured before it will appear in the Special Services and Listeners folder.

1. From the menu bar, select **Workspace**.
2. Right-click the **Special Services and Listeners** folder, and select **New**, then **SOAP**.
The Listener Configuration page opens.

3. Enter values in the PORT and HOST fields.

4. Optionally, enter a host or IP address that will be accepted by listener in the RESTRICT_TO_IP field.

5. Click Save and Restart Listener.

The SOAP listener is added to the Special Services and Listeners folder.

**Procedure: How to Return a JSON Answer Set Using the SOAP Listener**

Using the Simple Object Access Protocol (SOAP) Listener, you can run report requests or DataMigrator flows using RESTful Web Service calls. The answer set is returned in JSON format.

1. First, configure the SOAP Listener as described in *How to Configure a SOAP Listener* on page 638.

2. Place the procedure to run in an application directory in the APP PATH of the Reporting Server.
Assuming you created the WebFOCUS Retail tutorial in the ibisamp application, the following FOEXEC can be created in ibisamp to demonstrate the JSON Answer Set feature. If you created the WebFOCUS Retail tutorial in another application name, substitute application names where applicable.

```sql
TABLE FILE WF_RETAIL_LITE
SUM
  COGS_US
BY BRAND
BY PRODUCTCATEGORY
BY PRODUCT_SUBCATEG
IF PRODUCTCATEGORY EQ '&CATEGORY'
END
```

Note that the request has an IF test that requires a value for the variable &CATEGORY. You will supply the parameter name and value as part of the URL.

3. In a browser window, enter a URL in the following form.

```
http://host:port/rest/app/proc?param=value ...
```

where:

- **host**
  Is the Reporting Server host name.

- **port**
  Is the SOAP Listener port number.

- **app**
  Is the application that contains the procedure. This application must be on the APP PATH of the Reporting Server.

- **proc**
  Is the procedure name and extension.

- **param**
  Is a parameter name.

- **value**
  Is the parameter value.

**Example:** Returning a JSON Answer Set

For example, to run the retail_ws.fex procedure with the parameter &CATEGORY=Accessories, in the ibisamp application, on the host localhost, enter the following URL and press Enter.

```
http://localhost:8050/rest/ibisamp/retail_ws.fex?CATEGORY=Accessories
```
The following answer set is returned in JSON format. In this answer set, after the message header information and report statistics, each row is listed in an array named `rows`. The array of all rows is enclosed in square brackets (`[]`). Each row is enclosed in curly braces (`{}`) and separated from the other rows by a comma (`,`). The rows consist of `fieldname: value` pairs separated by commas. Alphanumeric values are enclosed in double quotation marks (`"`).

```json
{ "_ibi_Report" : {
  "Messages" : [ "0 NUMBER OF RECORDS IN TABLE= 10 LINES= 10"],
  "rows" : [
    { "BRAND" : "Audio Technica" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 38000.00},
    { "BRAND" : "Denon" , "PRODUCTCATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 25970.00},
    { "BRAND" : "Grado" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 21930.00},
    { "BRAND" : "Logitech" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Universal Remote Controls" ,
      "COGS_US" : 61432.00},
    { "BRAND" : "Niles Audio" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Universal Remote Controls" ,
      "COGS_US" : 73547.00},
    { "BRAND" : "Pioneer" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 16720.00},
    { "BRAND" : "Samsung" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Charger" , "COGS_US" : 5405.00},
    { "BRAND" : "Sennheiser" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 78113.00},
    { "BRAND" : "Sony" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Charger" , "COGS_US" : 3168.00},
    { "BRAND" : "Sony" , "PRODUCT_CATEGORY" : "Accessories" ,
      "PRODUCT_SUBCATEG" : "Headphones" , "COGS_US" : 18592.00}
  ]
}
```

### Other Listener Options

The Listener right-click menu also enables you to configure the servlet and refresh the WebFOCUS jar files.

#### Procedure: How to Configure the Servlet

1. From the menu bar, select `Workspace`.
2. Open the `Special Services and Listeners` folder in the navigation pane.
3. Right-click `TCP/HTTP` and select `Configure Servlet`.

   The Configure Servlet page opens.

4. Enter the path to your Java Development Kit in the `JDK_HOME` field or click or click the selector button (…) and navigate to it.
5. Optionally, you can elect to register the JDK by selecting y from the Register JDK_HOME drop-down menu.

6. Enter the string that uniquely identifies the servlet and is a part of the URL allowing access to the servlet in the Context PATH field. The default value is ibi_apps.

7. Click Configure.

**Procedure:** How to Refresh the WebFOCUS Jar Files

1. From the menu bar, select Workspace.
2. Open the Special Services and Listeners folder in the navigation pane.
3. Right-click TCP/HTTP and select Refresh WF jar files.

   The Copy server related java components into WF installation directory page opens.

4. Enter the path to the jar files in the IBI_Repository_Root_Directory field or click the selector button (...) and navigate to it.
5. Click Refresh WF jar files.

**Note:** After copying the files, the application server will need to be restarted.
Troubleshooting

The Web Console enables administrators to access several diagnostics tools that can be used to visualize different internal information. The following section describes the pages used to access such information to perform problem analysis tasks.

In this chapter:

- Viewing Version Information
- Analyzing Server Activity
- Analyzing FOCUS Database Server Activity
- Tracing Server Activity
- z/OS-Specific Troubleshooting for the Unified Server
- z/OS-Specific Troubleshooting for z/OS HFS Deployment
- Recording and Reproducing User Actions
- Troubleshooting the Console
- Server Processes
- Gathering Diagnostic Information for Customer Support Services

Viewing Version Information

The Version information page displays the main identification parameters of the Server configuration that was in effect when the Server was started.

Procedure: How to Access Version Information on the Web Console

On the Web Console menu bar, click Help, then select Version. The Version pane opens.

The following information is displayed:

- **General**
  - **Configuration Date**
    
    Indicates the configuration date of the Server.
**Build date**
Identifies the build.

**Gen number**
Identifies the gen.

**Release**
Identifies the release.

**Source date**
Identifies the source date.

**Extended**

**WF jar seq number**

**WF jar release**
Provides jar-related information.

**Build system**

**Support System**
Build-related and system-related information.

**C Compiler**

**C Version**
Identifies the C compiler and version.

**Ajax Framework**
Identifies the Bindows version.

**Host Name**
Name of the machine where the Server is installed.

**Server Name**
As defined in the configuration file.

**Note:** Used on Windows platforms as the system service name for the Server.
Analyzing Server Activity

You can use the Server Log pane in the diagnostics section of the Web Console to view the current or prior server activity log (edaprint.log) from either a management perspective (Session and Connection activity) or a raw version of the log with or without filtering for certain components and IDs. By default, the Server Log chronologically records all server activity from the time the Workspace Manager was started. It contains basic activity information, as well as server start up information and IBISNAP and shutdown information. IBISNAP is a snapshot of the server environment showing various usage statistics, CPU and server times for each data agent connection, and listener and agent status. If an abend occurs, the snapshot contains additional debugger stack information that aids the Customer Support Services staff in determining the problem.

You can view the first 50,000 lines of the log file from the Web Console. If you wish to view lines beyond 50,000, you can open or save the file in a text editor.

**Procedure: How to Access the Server Log Files**

1. From the menu bar, select *Workspace*.
2. Expand the *Logs and Traces* folder in the navigation pane.
3. Right-click *Workspace Logs* and select *View*.

   The Workspace Logs page opens.

4. Right-click *hliprint.log* and select *View* or

   ![Workspace Logs](image)

   **File Name** | **Size (KB)** | **Last Modified**
   --- | --- | ---
   hliprint.log | 132 | 2010/05/17 10.28.56
   edaprint.log | 763 | 2010/05/17 11.15.56

   "2/2"
Right-click edaprint.log and select a report type:

- **Full Report** has View and Open or Save options.
- **Connection Report** has Detail, Summary and Graph options.
- **Page Hit Report** has Detail and Summary options.

The log opens in the right pane.

**Procedure:**  **How to Display the Live EDAPRINT Log File**

To display the live EDAPRINT log file:

1. From the main menu, select Workspace.
2. Right-click the *Workspace* folder and select *Live Console*, as shown in the following image.

The EDAPRINT log opens in a separate browser page showing connections, disconnects, and other activity happening live on the server.
You can also access the live EDAPRINT log by selecting Live Console from the Monitor section of the ribbon, as shown in the following image.

![Monitor ribbon](image)

**Note:** This option is only available when using a Firefox or Chrome browser.

**Procedure:** How to Open a Copy of the EDAPRINT Log File

To open a copy of the EDAPRINT log:

1. From the Web Console, click Workspace.
2. From the ribbon, click the Current Workspace Log icon, or right-click the Workspace folder in the navigation pane, and select Current Workspace Log.

Your browser will ask whether you want to open or save the file.

If you choose open, the file will open in your default text editor.

The top of the EDAPRINT log file contains all environment variables.

In addition, if JDK_HOME and JAVA_HOME are both not set, the following warning message displays in EDAPRINT:

\[ \text{W JDK_HOME=} \text{ or JAVA_HOME=} \text{ required for Java Listener start} \]

The following shows a sample of the top of the edaprint file.
Procedure: How to Set Workspace Log Properties to Control the Edaprint Log

The Workspace Log Properties page controls both the edaprint log and event routing email. For information on event routing email, see Setting Workspace Log Properties for Event Routing on page 511.

1. From the menu bar, select Workspace.
2. Open the Logs and Traces folder.
3. Right-click Workspace Logs and select Properties.
The Workspace Logs Properties page opens, as shown in the following image.

4. Enter or select values for the EDAPRINT parameters.

The EDAPRINT parameters are:

**edaprint_history**

Defines the number of saved edaprint.log files to keep. Valid values are 0-99. The default value is 5.

**edaprint_max_lines**

Defines the maximum number of lines in an edaprint.log before it is archived, and a new edaprint.log is started. The default value is 0, which means unlimited.

**edaprint_max_days**

Defines the maximum number of days from the time the server is started before an edaprint.log is archived and a new edaprint.log is started. The default value is 0, which means unlimited.

**Note:** A new edaprint.log file will only be created after the edaprint_max_days value has been exceeded, and a connection event has occurred. For example, if the server is idle, the new edaprint.log file will not be created until a connection request is received.
edaprint_ipname

Defines whether the server should convert IP host addresses to names. It requires DNS lookups. The default value is n.

5. Click Save and Restart Server.

Procedure: How to Filter the Server Log

1. From the menu bar, select Workspace.
2. Expand the Logs and Traces folder in the navigation pane.
3. Right-click Workspace Logs and select Filter.

   The EDAPRINT Log Filter page opens.
   Select an option from the Select Filtering drop-down menu.

4. Click Set Filter.
5. If you choose *Filter by Category*, the following page opens. Set your filtering parameters and click *Set Filter*. For any item, clicking the check box without an entry in the input box filters on all items of that type. If you also enter a specific value in the input box, that filter will be executed. (For example, you can request filtering on all users, which defaults to *, or an individual user.) You can combine items from the list, mixing all items of a type with specific items, as needed.
6. If you choose *Filter by Timestamps*, the following page opens. Enter From timestamp and To timestamp information and click *Set Filter*.

7. Right-click *Workspace Logs* and select *View*.

   The Workspace Logs page opens.

8. Right-click *edapring.log* and select a report type.

**Reference:** Controlling EDAPRINT History

The size of the server activity log, the number of files archived in the EDAPRINT history, and the maximum number of days each edaprint.log is maintained before it is archived and a new edaprint log is started are controlled by *edaprint_max_lines*, *edaprint_history*, and *edaprint_max_days*, respectively.

Limit the size of each log file by setting the maximum number of lines to a value other than zero. There is no minimum, but the recommended value is at least 1000 lines. If the limit is too low and the system is too fast (such that two archived files can have the same file system time stamp to the same second), whichever of the archived files is deleted first is undefined.
The first log file for each server start always contains more lines than the maximum because the count begins only after the edaplog process is created, thus it is larger by the size of the startup information. Each time the limit is reached, the current log file is archived and the new file starts with an additional identification line. This line indicates the rank of the file in the series of continuation files, and a reference to the archived name of the first file in the series (the one with the startup information), in a format similar to the following:

```
continuation #n of edapriNN
```

The number of files kept archived is determined by setting the edaprint_history parameter to the maximum number of edapriNN.log files. Each time the server is restarted or the current log reaches maximum size, the previous edaprint file is moved to edapriNN.log, and the maximum number of files is enforced by deleting the oldest files. The effective minimum number of files kept may be as high as 2 in addition to the current edaprint.log, even if edaprint_history was set to 0 or 1 because when files are split to respect edaprint_max_lines, the most recent file and the most recent file containing startup information are always preserved.

**Analyzing FOCUS Database Server Activity**

FOCUS Database Server (FDS) is a listener that enables multiple users (or multiple agents) to update central a FOCUS database simultaneously. Database transaction events are logged to the HLIPRINT log file (hliprint.log), which is created in the server directory.

You can view the first 50,000 lines of the log file from the Web Console. If you wish to view lines beyond 50,000, you can open or save the file in a text editor.

**Controlling the HLIPRINT Transaction Log**

You can control the size of the HLIPRINT transaction log by using the hliprint_max_lines parameter in the configuration file, edaserve.cfg. The parameter defines the maximum number of lines to be included in hliprint.log before it is archived and a new hliprint log is started.

Each time the line limit is reached, the current HLIPRINT log file is archived to HLIPRI01 and the new file starts with an additional identification line. This line indicates that the file was truncated and looks like the following:

```
continued from hlipri01
```

Archiving also takes place the first time the FDS listener is activated and the HLIPRINT log from the previous run is found in the server directory.

**Procedure:** How to Control the Size of the HLIPRINT Log From the Web Console

1. From the menu bar, select *Workspace.*
2. Expand the *Special Service and Listeners* folder in the navigation pane.

3. Right-click *FDS*, and select *Properties*.
   
   The Special Services Configuration page opens.

4. Expand the *Advanced* section by clicking the arrow.

5. Enter a value for:

   `hliprint_max_lines`

   Is the maximum number of lines to include in the hliprint.log before it is archived and a new hliprint log is started. You can limit the size of the log file by setting the maximum number of lines to a value other than zero. (0 means an unlimited number of lines can be included in the file.)

   There is no minimum, but the recommended value is at least 1000 lines. If the limit is too low, the FDS listener may experience performance problems due to excessive archiving.

6. To register this setting, click *Save*. 
Controlling HLIPRINT Output

The Server Administrator can control hlprint.log output by manually adding the EDAHLIP variable, with a value, to the edaserv.cfg file, in the form edahlip=value where valid values are:

none

No hlprint.log is created. Turning logging off will increase performance, however, this is not recommended, because it makes it harder to diagnose problems.

echo

The hlprint.log is created and contains basic transaction information (one line per transaction; line length 80 characters).

stat

The hlprint.log is created and contains basic transaction plus timing information (one line per transaction; line length is 133-characters).

The default value is stat.

Tracing Server Activity

You can activate traces at server startup or while the server is running. Information Builders recommends starting the server with traces active so that a full set of traces can be sent to Customer Support Services to help diagnose issues that arise. If you need to contact Customer Support Services for assistance, you can use a facility called savediag to expedite the transmission of server information. For details about using savediag, see Gathering Diagnostic Information for Customer Support Services on page 685. Refer to the Installation manual for your platform for more information on starting the server with traces active.

To activate traces for a running server, a server administrator can quickly enable or disable traces at any point in a work process by clicking , Enable (or Disable) Traces from the User quick link menu on the Web Console menu bar.

The server administrator can use the Web Console to initiate and control a wide range of traces, and dynamically turn traces on or off for a running server. To see a list of traces, select Workspace from the menu bar. Open the Logs and Traces folder on the navigation pane, right-click Traces, and select View.
The Web Console displays the following types of traces: Workspace Manager, Data Services, Java Services, Special Services, and Listeners. (The traces that are active vary depending on the types of requests that have been made against the server.)

Right-clicking a trace displays the following options:

- **View.** Displays the trace in the right pane.
- **Open or Save.** Enables you to open the trace in a local editor or to save it to a local disk.
- **Delete.** Enables you to delete the selected trace file. On Windows, a trace file cannot be deleted if it is still in use by a process.

Note that the selected trace file is displayed with any active filtering applied.

Once traces have been configured and turned on by a server administrator, they can be viewed by users with the General privilege SRVLG (View Server Logs and Traces, Create Savediag), which can be configured from the Access Control page.

**Procedure:** How to Access the Last Agent Trace

To access the last agent trace:

1. From the menu bar, select **Workspace**.
2. From the ribbon, click **Log and Trace** and then click **Last Agent Trace**, or the right-click the **Workspace** folder in the navigation pane, point to **Log and Trace**, and click **Last Agent Trace**. 

The last agent trace opens.

**Reference: SET TRACEUSER Commands**

If you want to turn dynamic traces on or off for one user, you can include the command `SET TRACEUSER={ON|OFF}` in a user profile or in an individual procedure.

You can also use the `SET TRACEUSER=tracename` command turn dynamic traces on and send the trace to a named file. The file must specify a .trc extension and use a full path name for server traces so the traces are retained after server execution.

**Configuring Traces**

You can configure traces to limit their size and select the components to activate.

**Procedure: How to Configure Traces**

1. From the menu bar, select **Workspace**.
2. Open the **Logs and Traces** folder on the navigation pane, right-click **Traces**, and select **Configure**.

The Traces Configuration page opens.

3. Optionally, set the trace size limit to a specific number of lines. After the limit is reached, trace data is dumped to an alternate file with the extension TRB. Logging continues into the trace file with extension TRC. For related information, see *Limiting the Size of a Trace File* on page 660.
A blank entry indicates no trace size limit.

4. Select an option from the Choose the trace components to activate drop-down menu. The selections you make here are written into a file called ibitrace.fex. The settings take effect on the next server start/restart.

Note that Customer Support Services may request that you change from the default trace setting to a custom setting to facilitate their research.

**Default Components**

The Default trace components include all trace levels, with the exception of Reporting and Miscellaneous Services low level traces.

**All Components**

- All traceable server components.

**Typical Components**

- CEH
- NWH2
- PRH
- SQLAGGR
- STMTRACE

**Custom Components**

This option allows you to select the specific components to activate.

The components are categorized as follows (each category has a list of trace options within it):

- COMMAND PROCESSING
- COMMUNICATIONS and SYSTEMS
- COMMON ADAPTER LAYERS AND SERVICES
- SQL TRANSLATOR
- SQL DATA ADAPTERS
- OLAP DATA ADAPTERS
- NON-SQL DATA ADAPTERS
5. Click the Save or Save and Restart Server.

Tip: If you wish to restore default settings or choose typical settings, select these options, then click Save Settings. The selected group will be checked when you reopen the Custom Components list.

Reference: Limiting the Size of a Trace File

You can use set the size limit of the trace files. The trace size limit specifies the maximum number of lines in the trace files. The value is written into the IBITRACE.FEX file as SET TRACESIZE = value and requires a server restart to activate. After the size limit is reached for a particular trace, the trace data is redirected to an alternate file with an extension of .TRB. When the size limit is reached in the .TRB version of the file, then writing resumes with the .TRC version of the file.

A trace cycles between the two matched sets of files to alleviate maxing out a disk drive with large individual traces. Each cycle starts a fresh file (versus an append). If there are intermediate traces that need to be saved, it is up to the site to monitor and implement specific methods to save traces based on their needs and capabilities. For example, copying to an archive disk or secondary machine and possibly using compression.
The SET TRACESIZE=\# setting must be used in conjunction with a SET TRACEON= value. If the IBITRACE.FEX file is changed or created using an editor, ensure that there is also a SET TRACEON= value setting. The existence of the IBITRACE.FEX file only sets what is traced when tracing is active, but does not control if tracing itself is active.

**Reference:** Displaying Microseconds in Trace Timestamps

Displaying microseconds may be useful if trying to match very precise event times between traces or study the performance of specific events when multiple events occur within a given second on a normal trace.

The setting syntax is SET TRACESTAMP=TLEFT and may be used in a focexec to activate in a specific trace or in the IBITRACE.FEX file to activate at server start.

There is no Web Console feature on the Trace Configure page to activate TRACESTAMP in IBITRACE.FEX, but the line can be added by opening the Configuration Files folder in the Web Console and using the edit against the Trace Profile object.

The SET TRACESTAMP=TLEFT setting must be used in conjunction with a SET TRACEON= value. Always ensure that there is also a SET TRACEON= value setting in the IBITRACE.FEX file when editing. The existence of the IBITRACE.FEX file only sets what is traced when tracing is active, but does not control if tracing itself is active. The SET TRACESTAMP=TLEFT feature also negates the ability to properly use Web Console Trace Filtering for specific events, do not use filtering with this feature active.

**Filtering Traces**

Filter allows you to limit the types of errors or components that are included in the traces.

**Procedure:** How to Filter Traces

1. From the menu bar, select *Workspace*.
2. Open the *Logs and Traces* folder on the navigation pane, right-click *Traces*, and select *Filter*.
   
   The Traces Filter page opens.
3. Select an option from the *Trace components to filter* drop-down menu:
   - *No Filtering* (the default) displays all trace information.
   - *Errors* displays only errors, crashes, errno, abort, or fail conditions.
   - *Typical Components* displays trace information from typical components.
Custom Components displays trace information from components which you select.

4. Click Set Filter. The filters take affect when you enable and run traces.

Procedure: How to Capture Traces in a Script File

Capturing traces in a script file enables you to isolate server problems. Specifically, you can enable this type of custom trace, then reproduce the problem and capture the input commands issued from a front-end tool (such as WebFOCUS Developer Studio) to the server. Customer Support Services can then isolate debugging for the server only, instead of having to recreate a whole complex environment.

1. From the menu bar, select Workspace.
2. Open the Logs and Traces folder on the navigation pane, right-click Traces, and select Configure.
3. Select Custom Components from the Trace components to filter drop-down menu.
4. Click the Unselect All button.
5. Choose AJ - NWHSIM/1 under Communications and Systems.
6. Click Set Filter.

The trace setting will be active the next time the server is started.

Showing the Session Log

The Session Log records the activity that takes place between the current Web Console session and the server. For example, when a procedure or DataMigrator job is run, the Session Log records the WebFOCUS code and SQL statements that are sent from the console to the server for execution on the server.

The log also records the response that the server returns, in addition to the answer set, such as error messages and informational messages.
Changing the Size of the Session Log Buffer

By default, the Session Log holds 1000 lines. You can increase or decrease the number of lines.

Procedure:  How to Change the Size of the Session Log Buffer

1. From the menu bar, select Workspace.

2. In the navigation pane, right-click the Workspace folder, point to Workspace SET, and select Miscellaneous Settings.

3. On the Miscellaneous Settings page, locate the seslog_max_lines field, and type the number of lines to assign to the buffer for the Session Log.

In the following image, the value for seslog_max_lines is set to 750.

4. Click Save. You do not need to restart the server for the new setting to take effect.
Procedure: How to Show the Session Log

1. On the Web Console menu bar, click the Session Log icon on the User quick link menu, as shown in the following image.

The Session Log opens, as shown in the following image.
2. Click the Maximize button at the upper-right of the pane to enlarge it.

3. Click the Refresh button on the left of the Session Log menu bar to display the current contents of the log.

4. Optionally, click the Filter icon to select only those commands or data that you want to include in the Session Log. You can select:
   - Focus, to display WebFOCUS commands sent to the server for execution.
   - Sql/mdx, to display SQL or MDX code that is generated by an adapter and sent to a relational database or OLAP database, respectively.
   - Transform, to display the result of transforming the user-supplied code in a procedure, into WebFOCUS code that is supported on the server. This option is useful for DataMigrator jobs that require transformation.
   - Errors, to display error messages returned from the server.
   - Messages, to display informational messages returned from the server, for example, NUMBER OF RECORDS IN TABLE, SVG FILE SAVED, and others.
   - Timestamp, to display the date and time at which a command or message was exchanged. For example, if you select Errors and Timestamp, the Session Log displays the time at which an error message was returned from the server.
   - No Delay, to display the Session Log while a request is still running, not after it has finished running. This option is recommended for long-running requests.
In the following image, the check boxes for Focus, Messages, and Timestamp are selected to include the display of WebFOCUS commands and messages, and to include the date and time of each entry in the log.

When you filter the Session Log, its contents automatically refresh to reflect the last criterion that you specified.

5. Optionally, you can do one of the following:

☐ Click the **Clear Messages** button on the left of the Session Log menu bar to remove the current contents of the log.

☐ Click the **Refresh** button on the left of the Session Log menu bar to update the log.

☐ Use standard editing functions, such as:

- Ctrl+A, Ctrl+C, and Ctrl+V to select all the contents of the log, copy it, and paste it into another file.
- Ctrl-click to highlight a line.
- Shift at the beginning of a block of lines, and Shift-click at the end of the block of lines, to highlight the lines.
6. When you have finished reviewing the messages in the Session Log and want to close it, click **Hide** on the right of the Session Log menu bar.

**Procedure: How to Show the Log for a Web Session**

You can display a log of the activity that takes place in an individual Web Session.

1. From the menu bar, select **Workspace**.
2. From the ribbon, click the **Web Sessions** icon, or expand the **Special Services and Listeners** folder in the navigation pane, right-click **HTTP**, and select **Web Sessions**.

The Performance Report for all Web Sessions is displayed.

3. On the report, right-click a row for an individual Web Session, and from the menu, click **View Session Log**.

The log for the selected Web Session opens, as shown in the following image.

![Session Log](image)

**z/OS-Specific Troubleshooting for the Unified Server**

If you are working in the z/OS environment, you should be aware of several diagnostic techniques that are described in this topic.

**Server Traces and Saved Diagnostics on the Unified Server**

To generate a server trace:

1. Turn tracing on from the Web Console or by issuing the MODIFY operator command:

   ```
   F <iway_server_jobname/started task>, -traceon
   ```

2. Alternatively, on HFS you can run the ITRCON JCL member.
3. Reproduce the problem.
4. Submit the ISAVEDIA member to produce the diagnostic information. For PDS deployment, diagnostic information is generated at the JES log output of the server. For HFS deployment, a directory called sdnnnnnn is created under your configuration directory (for example, /ibi/server53/hfs/sd123456). Diagnostic information is placed in this directory. Verify that you have access to this directory.

Do not change anything in the EDAENV DD statement, as changes could prevent the correct information from being copied to your directory.

**U4039 Abends on the Unified Server**

In some instances, the server may abend with a U4039 code. This is a generic abend.

**Solution:** Determine what caused the abend by checking the file, SYSOUT DDname and the MVS system log. If you suspect this is a bug, follow the instructions in *z/OS-Specific Troubleshooting for the Unified Server* on page 667 and *System Dumps on the Unified Server* on page 668 in order to collect information to send to Information Builders support.

**System Dumps on the Unified Server**

To generate a system dump:

1. Allocate DDNAME SYSMDUMP pointing to the data set with the following DCB parameters:

   `RECFM=FB,LRECL=4160,BLKSIZE=4160`

2. To get the first dump, add the parameter FREE=CLOSE to your DD statement. The DD statement should appear as follows:

   `/SYSMDUMP DD DISP=SHR,DSN=MYID.EDAPTH.SYSMDUMP,FREE=CLOSE`

3. To get the last dump, the statement should appear as follows:

   `/SYSMDUMP DD DISP=SHR,DSN=MYID.EDAPTH.SYSMDUMP`

   Only two IDs must have privileges to write into this data set: ISERVER and IADMIN. General server users DO NOT need read or write access to the SYSMDUMP data set.

4. To prevent abendaid from intercepting the dump, add:

   `/ABNLIGNR DD DUMMY`

5. To prevent Language Environment from intercepting the dump, specify:

   `EDADUMPOPT=UAIMM in EDAENV DD`
This enables you to get more accurate information reflecting the moment the abend actually occurs.

6. Save the entire job output for the server (including JES logs).

**Freeing Data Sets Allocated to the Server on the Unified Server**

A z/OS operator can issue modify commands to free DDNAMES (or dsnames) allocated to the Server. Both global allocations (made at the server ISTART JCL) and local ones (DYNAM ALLOC commands issued by user tasks) can be freed. This procedure is useful if you need to free an allocation to run a batch utility overnight, without restarting the server.

**Syntax:**  How to Free a Data Set From the MVS System Console

To free a single DDNAME:

```
F <iway_server_jobname/started task>,DYNAM FREE FI <ddname>
```

To free a single dsname (all occurrences in the server):

```
F <iway_server_jobname/started task>,DYNAM FREE DA <dsname>
```

To free multiple DDNAMES, passing a pattern (free all ddnames staring with AB):

```
F <iway_server_jobname/started task>,DYNAM FREE FI AB*
```

To free a multiple dsname (all occurrences in the server), passing a pattern (free all allocations of data sets starting with IWAY.VSAM*):

```
F <iway_server_jobname/started task>,DYNAM FREE DA IWAY.VSAM*
```

A message will be issued in the iway_server JESMSGLG indicating if the command was processed successfully or not.

success:

```
@DYNAM COMMAND SUCCESSFULLY PROCESSED Rc=0
```

failure:

```
@DYNAM ERROR: IKJ56225I DATA SET IWAY.TEST ALREADY IN USE, TRY LATER
```

Once the data set is freed and the batch utility runs, the operator can reallocate the data set to the server, using the same modify command, but this time issuing DYNAM ALLOC, instead of DYNAM FREE.
**Example:**  **Freeing the Allocated Data Set**

Suppose ISTART JCL (jobname IWAYP) has the following allocation:

```plaintext
//VSAMFILE DD DISP=SHR, DSN=VSAM.FILEA.CLUSTER
```

The operator can free this file using the command (from MVS console):

```plaintext
F IWAYP, DYNAM FREE VSAMFILE
```

Later, after the batch utility runs, the operator can re-allocate the file to the server by issuing the command:

```plaintext
F IWAYP, DYNAM ALLOC F VSAMFILE DA VSAM.FILEA.CLUSTER SHR REU
```

All valid DYNAM ALLOC and DYNAM FREE syntaxes are supported. For more information on DYNAM command, please refer to the appropriate WebFOCUS manual.

**z/OS-Specific Troubleshooting for z/OS HFS Deployment**

The troubleshooting techniques described in this sections are available for a z/OS HFS deployment.

**Recovering Orphaned Shared Memory Segments on z/OS**

When the server is restarted after an abend, an orphaned shared memory segment is often found. A server start will try to clear the memory segment so that it may continue the start process. The accompanying error message (which also displays even if the server *self-recovers*) is:

`Shared memory remains but WSM process is gone`

Self-recovery is often successful and the message may be ignored. However, if the server still fails to actually start, you can use manual commands to find and remove the shared memory. The associated directory location that is used as the shared memory key will not actually be available until a machine IPL. To avoid waiting for a machine IPL, you can set EDASHARE manually in ISSTART EDAENV DD and the ISTOP JCL to point at a new directory location.

1. To display the orphaned memory objects, issue the command:
   ```plaintext
   IPCS M -X
   ```

2. To remove the orphaned memory objects, issue the command:
   ```plaintext
   IPCRM M
   ```

   IPL will eliminate the orphaned shared memory segment.
3. If you cannot IPL the machine, temporarily add the following EDASHARE setting (with the client directory path) to the ISTART EDAENV DD.

```plaintext
000050  //EDAENV      DD      *
000051  TZ=EST5EDT
000053  EDASHARE=/ibi/srv77/ffs/web
```

where:

```plaintext
web
```

Is a newly created directory. It can be any name.

This will point the server to a new directory to be used as the shared memory segment key.

This syntax should also be added to the ISTOP JCL, but should be removed from both JCLs after IPL.

**INSUFFICIENT AUTHORITY TO GETPSEN'T Messages on z/OS**

INSUFFICIENT AUTHORITY TO GETPSEN'T messages may appear in JESLOG. For more information about what causes these messages, see the IBM APAR II11813.

The APAR recommends issuing one of the following RACF commands to work around this problem:

```
SETOPTS LOGOPTIONS (NEVER(PROCACT))
SETOPTS LOGOPTIONS (DEFAULT(PROCACT))
```

However, when a non-superuser in the OMVS shell issues the command `ps -ef`, the following security message is repeated in SYSLOG:

```
ICH408I USER(default) GROUP(dgltgrp) NAME(bpxdefaultuser) 060 CL(PROCACT ) INSUFFICIENT AUTHORITY TO GETPSEN'T
```

This does not indicate an error. It is an informational message issued because of RACF LOGOPTIONS settings. The `ps -ef` command is a request to show all processes that the requester is authorized to see, but a non-superuser is allowed to see only his or her own processes.
Recording and Reproducing User Actions

You can use the Web Console Record and Playback tools to record an exact sequence of user actions applied through a browser, and then reproduce it (play it back) to evaluate server response times in an environment that simulates single or multiple users under the same or different conditions. Files generated by record and playback, known as HTI scripts (HTTP internal scripts), are stored in the scale directory of the server (parallel to APPROOT). The filename can be edited before recording starts. These scripts, along with server traces, are used for testing and analysis of problems.

Record/Playback is an iterative process in which you can repeat your tests under varying conditions until you achieve the throughput and response time you require.

**Tip:** It is often useful to employ two browser windows for stress testing using the Record/Playback tool, one to turn the recording on and off and enter playback parameters, the second to capture the actions you wish to record. (Note that if you do not use two sessions, you will have to edit the request being stressed to remove the record/setup actions.)

In order to be able to capture these actions, you must properly configure your LAN setting.

Here is an overview of the steps:

1. Set your browser to use the Reporting Server as a proxy server. This will allow you to capture user actions in a web browser. For details, see *How to Configure Your Browser to Use the Reporting Server as a Proxy Server* on page 673.

2. Start the script recording.

3. Run the request you want to test.

4. Stop the recording. You will be able to reuse this script with varying test conditions.

5. Play back the script you recorded, setting stress parameters, such as the number of threads (simulated users) and the intervals at which the request will be run.

6. Evaluate server performance using the Playback log, the output (.hto) files generated by the test, and stress test performance reports.

7. Repeat steps 2-7 as many times as necessary to simulate and evaluate the conditions you want to test.

**Note:** The Report/Playback feature is not currently supported on the PDS Deployment Server. Therefore, options are disabled on the Web Console.
**Procedure:** How to Configure Your Browser to Use the Reporting Server as a Proxy Server

When using an Reporting Server as a proxy, you can record user actions that are directed to any web site. In order to be able to record the sequence of actions that a user will complete using the browser, you must first enter the proper LAN settings.

1. From the Internet Explorer toolbar, select **Tools** and then **Internet Options** from the browser menu bar.
2. Select the Connections tab, then click the **LAN Settings** button. The Local Area Network (LAN) Setting window opens.
   
   **Tip:** Before you make the required changes, note your standard settings. You will want to revert to them later.
3. Click the **Use a proxy server for your LAN** check box.
4. Enter the host name in the Address box. (This identifies the machine on which the client software is installed.)
5. Enter the port number for which the client is configured.
6. Click **OK** to return to the Internet Options window.
7. Click **OK** again to complete the task.

Leave the browser open since you will use it to display the Web Console.

**Procedure:** How to Stress Test Server Performance

The simplest way to record an HTI script is by running a stress test on a procedure. For information, see *How to Run a Stress Test* on page 478.

1. From the menu bar, select **Scalability**.
2. Right-click the **Scalability** folder and select **New**, and then **Recording**, as shown in the following image.

   ![Recording Image]

   The Playback of HTI Script files pane opens.
3. Click New, then Recording on the expanded menu bar to open the Recording of HTI Script File pane, where you can specify a script name and the directory in which you want to store it.

![Recording of HTI Script File pane](image)

A default directory name appears in the Script Directory drop-down list. You can use the default name, edit it, or choose an existing directory from the list.

4. Enter a script name or use the default name. This is the name of the file that will contain the script.

5. By default, a new HTI script is generated when you start a recording session. Click the Append to Existing check box if you prefer to append a recording to the existing HTI script.

6. By default, the recording captures all user actions. Click the Do not record requests to get css, js, gif, bmp, jpg, class, jar, or png files if you wish to exclude requests for these operations from the recording.

7. Before you start the recording, you must get into position to execute the set of actions you want to test. Open a second browser and ensure that the correct LAN setting are in effect. (For details, see How to Configure Your Browser to Use the Reporting Server as a Proxy Server on page 673.)

8. Return to the first browser window, where the Recording of HTI Script pane is still open, and click Start to begin recording.

9. Return to the second browser window and perform the actions you wish to record.

10. When you have captured all of the required actions, return to the first browser window, where the first the Recording of HTI Script pane is still open. Click Stop to end the recording.

11. Click the Refresh icon on the navigation pane to display the new directory and script.
12. Since you have completed the recording task in the second browser window, it is a good idea to remove the LAN setting you entered expressly for this purpose. (For more information, see How to Configure Your Browser to Use the Reporting Server as a Proxy Server on page 673.) You can now close this window.

13. You are now ready to perform your stress tests. From the Playback folder in the navigation pane, expand the Individual Tests folder, expand the script directory you named in step 3, and click the script name you entered in step 4.

14. Choose Start from the menu. The Playback of HTI Script Files pane lists the available test parameters.

You can choose basic and advanced test options from the Playback of HTI Script Files pane. For details about these options, see Parameters for Playback of HTI Script Files on page 679.

For example, you might wish to perform a stress test twice with the following conditions:

**Test 1:** Use the default Number of Threads (1) to simulate one user and the default Interval Parameters (.5) second to indicate how often you want the request to run. Enter a Test Description, such as Baseline with one user, to be able to distinguish among the tests. Click the Advanced tab and accept the default format of one file per thread. (In this case, you are only testing one thread.)

Click Start to run the test.

**Test 2:** Set Number of Threads to 30 to see how performance would be affected if 30 users ran the request simultaneously (with a given number of agents that may or may not be less that 30). This setting is key to stress testing. Adjusting the number of threads allows you to assess how many requests the server will be able to handle at a given point in time. Increasing the number of threads puts more load on the server(s). In practice, users may want to start out with a smaller or larger number depending on their installations. Keep the Interval Parameters as .5 seconds. Enter Sample 30 Users as the Test description.

Click the Advanced tab. This time select one file per request (rather than per thread) in the Results field and set the Keep alive parameter to 30 to indicate how long, in seconds, you want the script to run. This option enables enough statistics to be generated to make a comparison among server response times. (You may need to try different settings to find the optimal length of time to run the script.)

Click Start to run the test.
In each case, two files are stored in the ibi/scale/performance directory:

- A summary log is displayed in a separate window. The log provides information about the number of threads that ran (indicated by thread=), the number of requests serviced (indicated by request=), how long it took to service each request (indicated by resp=), and the time that the processing began (indicated by start=). It also reiterates your input and summarizes the test processing.

- An .hto output file is displayed in the Playback, Individual Tests folder, under the specified script directory and script name. This file indicates whether the client/server communication worked properly.

15. You can perform the following additional functions from the Individual Tests folder. Click a script name and choose:

- **Show requests.** Lists all submitted hti requests.

- **Edit script.** Opens the hti script file in a text editor. You can save the script or refresh from the disk.

- **Start.** Opens the Playback of HTI Script Files pane, where you can revise parameters and rerun the script.

- **View Log file.** Reopens the log file.

- **View Graph.** Produces the same output as the log file in graph format. The graph is particularly useful for comparing the average response time of the server with your specified Maximum Response time to determine if you have met your performance goals.

- **Delete Result.** Deletes the generated output but retains the script for reuse.

- **Delete Script and Result.** Deletes the generated output but retains the script for reuse.

16. Once the script is run, you may also want to open the Performance Reports folder and choose:

- **Basic Report** to see basic stress test statistics.

- **Extended Report** to see an expanded group of stress test statistics.
Custom Report to specify which statistics to include in the reports.

17. Typically, you would run additional tests with different input parameters in order to compare statistics under different simulated loads conditions. Based on these comparisons, you could determine the best server scenario for your needs.
Procedure: **How to Refresh or Remove Script Directories**

You can expand the Individual Tests folder and click a specific directory. A pop-up menu enables you to remove the selected directory or refresh it without having to refresh all of the other test directories.

1. From the menu bar, select the C icon, then Scalability.
2. From the navigation pane, expand the Individual Tests folder (if not already expanded).
3. Right-click a directory and choose either Refresh or Delete Script Directory from the menu.

Procedure: **How to Display Percentile Statistics in Results**

A percentile is the point in a distribution of scores below which a given percentage of scores is found. When you perform a stress test you can calculate percentile statistics for processing time by specifying the percentage against which the percentile value will be derived.

You request percentile statistics from the Playback HTI Script Files pane, which you can access in either of the following ways:

**As a diagnostics option:**

1. From the menu bar, select the W icon, then Scalability.
2. In the navigation pane, expand a directory folder, click a script name, and select Start from the menu. The Playback of HTI Script files pane lists Basic and Advanced test parameters. Enter basic test conditions: Number of Threads and Interval Parameter.
3. Click the Advanced tab. A variety of additional test options are displayed.
4. In the Show percentile statistics field, enter a number N, between 1 and 99, to calculate the processing time in your stress test distribution against which N% of the other processing times are lower. For example, if the distribution of 6 processing times in a stress test includes the following values: 1-1-3-3-4-5, and the percentage value for Show Percentile Statistics is set to 50 (%), then the 50th percentile processing time will be 3 because that is the lowest value in the distribution against which 50% of the processing times are lower.
5. Click Start to run the test with the specified condition(s).

The Percentile result, along with other test results, appears in a separate window.

**When stress testing a particular procedure:**

1. From the Web Console menu bar, select Applications.
2. Expand an application directory, right-click a procedure, and select Run Advanced, then Run Stress. The Playback of HTI Script Files opens. This pane lists the available test parameters.
3. Enter basic test conditions: *Number of Threads* and *Interval Parameter*.

4. Click the *Advanced* tab, and proceed as described in steps 4 and 5 above.

**Reference:** Parameters for Playback of HTI Script Files

Following is a list of general playback parameters that are available.

**Basic:**

*Number of Threads*

A positive number of threads to be used when playing the script. Each thread represents a single client (user).

*Interval Parameter*

Specifies timing in a multiple-client (multi-threaded) playback. Possible formats of this value are $m$ or $n, k$, where $m$ is the number of seconds between each client startup, and after each $n$ started clients, an interval of $k$ seconds is used instead.

**Test Description**

Enables you to create notes at playback time that will be displayed in the Extended Report.

If you reset statistics, all information about previous runs is deleted, including any Test descriptions.

**Tip:** This description provides a useful way to distinguish results as you test different combinations of options.

**Advanced:**

*Compare option*

Determines whether the response data received by all clients (threads) are identical. It uses a binary comparison mode and writes the comparison results to a playback log file.

*Immediate processing*

Ignores every SLEEP and WAIT statement in the HTI script. Issues HTTP requests without any delay between them.

*Show percentile statistics*

A percentile is the point in a distribution of scores below which a given percentage of scores is found. When you perform a stress test you can calculate percentile statistics for processing time by specifying the percentage against which the percentile value will be derived.
Enter a number \( N \), between 1 and 99, to calculate the processing time in your stress test distribution against which \( N\% \) of the other processing times are lower. For example, if the distribution of 6 processing times in a stress test includes the following values: 1-1-3-3-4-5, and the percentage value for Show Percentile Statistics is set to 50 (\%), then the 50th percentile processing time will be 3 because that is the lowest value in the distribution against which 50\% of the processing times are lower.

For related information, see *How to Display Percentile Statistics in Results* on page 678.

**Size statistics**

Displays general output file size statistics for multiple-client playback in the log.

These are useful for analyzing Playback results with a large number of threads. Size should be consistent between similar runs. A size change would generally indicate an execution failure.

**Simulate browser caching**

Enables browser-style simulated caching of static pages (currently, css, js, gif, bmp, jpg, class and jar files). Each thread (simulated user) maintains its own cache of requests. When a cached static URL is requested again by the same user, the Stress tool skips the request instead of downloading the URL again.

**Submit as deferred**

Executes a request using deferred, rather than immediate, logic.

**Save playback statistics**

Choose this option to make statistics for the current run available on reports.

The statistics are saved internally in the `$EDACONF/catalog` directory as rec0001.hti, rec0001.log, and rec0001_0001.hto.

For example, if the script generated in a recording session has the name rec0001.hti, then the run log and statistics are stored in the rec0001.log file and the output generated by each of three threads is rec0001_0001.hto, rec0001_0002.hto, rec0001_0003.hto.

**Traces**

Sets the Playback utility traces on or off. A trace file (TRC) is then created for each thread.

**Keep alive for**

Causes every thread to repeat a request for a specified time, in seconds. This option enables the server to generate enough statistics to make a comparison among response times.
Result

The HTTPTST module that records and plays back Web Console sessions can simulate multiple client access to the Web Console on playback (that is, a multi-threaded application).

Each thread does what is recorded in the .hti file. The server reply is recorded in the .hto file. However, you can control the output provided by selecting one of the following options:

- **One file per thread (default).** Displays output in .hto files. The server generates a summary .hto file that reports on the success or failure of the server/client communication in the format: For example:

  Number of successfully run threads : 5

  You can access this file by selecting Playback, Individual Tests, and then the script_directory folder in the format

  `scriptname--nnnn`

  where:

  `nnnn`

  Is a number that is appended to the file name. It indicates the size of the generated file.

  This option also generates a separate .hto file for each thread being tested; these files contain the code that renders the report. You can access these files by selecting Playback, Individual Tests, and then the script_directory folder in the format

  `scriptname_thread#_filesize`

  and view the contents in a text editor.

- **One file per request.** Displays a single .hto file in the Playback>Individual Tests folder. This is the summary file that reports on the success or failure of the server/client communication. For example:

  Number of successfully run threads : 5

  You can access this file by selecting Playback, Individual Tests, and then the script_directory folder in the format

  `scriptname--nnnn`
where:

nnnn

Is a number that is appended to the file name. It indicates the size of the generated file.

In addition to the summary file, the output for each request is written to the ibi/scale/performance directory in the format

```
scriptname_thread#_request#.ext
```

where:

ext

Is determined by the nature of the request (for example, HTML), and by its success or failure (failure is often represented as a .txt file). For example:

```
rec0001_0002_0041.html
```

where:

rec0001

Is the script name.

0002

Is the thread number.

0041

Is the request number.

Additional requests in the thread would be represented as:

```
rec0001_0002_0042.html
rec0001_0002_0043.html
```

Server

Sends request to a server defined in the odin.cfg file.

Use HTTP proxy

Send all requests through an HTTP proxy server. For example, www.myproxy.com:3192.

Save output to another directory

Saves output files, including traces, to a specified location (for example, c:\myfiles).
Reference: Additional Recording Hints

- When recording is on, the HTTP listener records every CGI request. It is important to ensure that no one else is submitting requests to the same listener.

- Do not try to record a script from the middle of a persistent session. Always try using user ID and password, then recording the first request.

Reference: Playback Files

Playback log files are generated during script playback. Each file contains general information about playback processing, such as thread startup and termination, connection errors, and comparison results.

- Log file names are composed by appending .log to the base file name of the HTI script used to generate the log. Two additional log files, stdout and stdlog, may be generated to report critical playback failures.

- Playback HTO files are generated when the script playback is complete. Every file contains data received by a thread.

  HTO file names are composed of the script file name, followed by the thread number and the .hto extension.

Troubleshooting the Console

If the web browser has problems accessing the Web Console, you may see the following messages.

<table>
<thead>
<tr>
<th>Error Message</th>
<th>Troubleshooting Tips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Internet Explorer cannot open the Internet site <a href="http://address:http_service">http://address:http_service</a>. A connection with the server could not be established.</td>
<td>Ensure that the Workspace Manager is running or else contact the local system administrator.</td>
</tr>
<tr>
<td>There was no response. The server could be down or is not responding. If you are unable to connect again later, contact the administrator of the server.</td>
<td>Ensure that the Workspace Manager is running or else contact the local system administrator.</td>
</tr>
</tbody>
</table>
Server Processes

The server uses a series of processes to accomplish various tasks. Some processes have specialized administrative functions, such as workspace management and logging, while others do end-user tasks. System administrators may want to know what processes the server creates and how many of each. The administrator may want this information for machine sizing or simply to know what processes to consider or ignore when a problem occurs.

Note that each operating environment uses operating system-specific commands to view processes. The processes are described generically, not how they would appear in a system listing.

Server Workspace Manager Daemon

The server workspace is controlled by a daemon process known as PTH. There is one process per server.

Deferred Requests Special Services Daemon

The server has several types of special services. The DFM daemon is used for deferred (DFM) and Scheduler requests. There is one process per server.

Server Log Daemon

The server log (edaprint.log) is now written using a single daemon process. Previous versions wrote to the log independently from the various processes that might write to the log. In very rare and specific cases, the prior methods were problematic, hence, the change to the use of a daemon. As a result, starting a server brings up this additional server log daemon (edaplog).

Server Check Up Daemon

The server has always had a process that wakes up and checks various states and takes actions. An example of this is stopping agents that are inactive past the idle limit. In the past this process has been part of the Workspace Manager function, but is now a separate daemon that runs independently. As a result, starting a server brings up this additional server check up daemon (edachkup).

HTTP Listener Daemon

The server has several types of listeners. The HTTP daemon is used for requests using the HTTP protocol. There is one process per server.
TCP Listener Daemon

The server has several types of listeners. The TCP daemon is used for requests using the TCP protocol. There is one process per server.

FDS Special Services Daemon

The server has several types of special services. The FDS daemon (HLISNK) is used for FOCUS Database requests from agent processes. There is one process per server.

Java Services Daemon

The JSCOM daemon is used for requests using Java. There can be more than one process per server.

Agent Daemons

The actual worker processes for requests are known as agents or tscom3 processes (tscom3 is the actual program name). There is one process per configured agent that is active. Agent processes normally are reused until a recycle point or until they become inactive for a set period. Thus, for a given server, the number of processes associated with agents will change over time.

Gathering Diagnostic Information for Customer Support Services

Diagnostic Service Accelerator (DSA) automates the gathering, packaging, and shipping (using FTP) of trace files and other diagnostic information for Customer Support Services using the edastart -savediag facility. A prompt mode is available for ease-of-use, as well as archiving and FTP posting capabilities. Automatic triggers are available for customer email confirmation. DSA also triggers the logging of the upload to the support case and flags the case as requiring attention, thereby accelerating diagnostics services by automating and closing the communication gap between customer and customer services.

In one step a customer can run a repro, then describe, archive (for example, as a ZIP file), and ship (using FTP) all the required information to Information Builders Customer Support Services.

Automatic triggers are available for customer email confirmation. DSA also triggers the logging of the upload to the support case and flags the case as requiring attention, thereby accelerating diagnostics services by automating and closing the communication gap between customer and customer services.
Note the following platform-specific information:

- **On Windows**, users must have a command line version of ZIP installed and on the system path for the archive and send feature to work properly.

- **On OpenVMS**, this feature optionally uses ZIP if it is installed and a symbol is declared. (Any commercial or open source version of ZIP may used.) Otherwise, the -savediag process uses BACKUP to create the archive.

- **All other platforms** use system supplied tools such as tar and pax, and require no additional steps to use the feature.

- **On IBM i (formerly known as i5/OS), z/OS, and Open/VMS**, batch/command files–CMD/CL, JCL, and DCL files, respectively–are available for users who prefer to use this method to control tracing and save diagnostics.

On Windows, the Start menu has equivalent options under the Diagnostics folder.

The files and their equivalent edastart commands are:

<table>
<thead>
<tr>
<th>File</th>
<th>Command</th>
</tr>
</thead>
<tbody>
<tr>
<td>ITRCON</td>
<td>edastart -traceon</td>
</tr>
<tr>
<td>ITRCOFF</td>
<td>edastart -traceon</td>
</tr>
<tr>
<td>ISAVEDIA</td>
<td>edastart -savediag</td>
</tr>
</tbody>
</table>

The physical execution of these batch files varies by platform. For information about location and use of supplied batch/command files, see the chapter for your platform in the Server Installation manual.

**Note:**

- The diagnostic process suggests a local location in which to save your files. However, you can supply a custom location if you prefer, as long as you avoid reserved system locations including the following: EDAHOME; APPROOT; EDAPRFU; SCAROOT; EDACONF bin; EDACONF etc; EDACONF edatemp; EDACONF dfm_dir; EDACONF img_dir; EDACONF catalog; EDACONF web; EDACONF user; any location that is a direct parent in the paths listed above; an ID’s HOME; the root of a device (that is, \ or /); c:\windows; c:\Program Files; c:\Documents and Settings; /usr and /usr/bin.
In the case of PDS deployment on z/OS, tracing and the edastart -savediag function must be done using the ISAVEDIA JCL method described in the z/OS PDS section of the Server Installation manual (where the diagnostic files go directly to the JES log output of the server) rather than the method described in the remainder of this section.

**Procedure: How to Create a Savediag From the Web Console**

To run a Savediag, you must be a Server Admin or have administrator privileges.

1. From the menu bar, click **Workspace** and select **Savediag - Report a Bug** from the Diagnostic section of the ribbon.

   The Savediag page opens, as shown in the following image.

   ![Savediag Page](image)

   - **Diagnostics Options**: Select **Save Diagnostics (savediag) and Post**
   - **Copy files from catalog to savediag**: Select **Yes**

   **Note**: The catalog directory is `C:\ib\srv\99\dm\catalog`

   **Savediag Directory**: `C:\ib\srv\77\dm\sd021611_154354`

   **Sample**: `C:\ib\srv\77\dm\sd021611_*`

   **Comments**

   **List of Applications**: `baseapp`

   **Sample**: `baseapp sql bsa amp app1`

   **Case Number**

   **Post ID**

   **Post Password**

2. Select from the **Diagnostic Options** drop-down menu.
The options are:

- Save Diagnostics (savediag) and Post. This is the default.
- Save Diagnostics (savediag).
- Post existing diagnostics.
- Delete existing diagnostics.

The available fields will vary, depending on the Diagnostic Option selected.

3. Choose whether to save files from the catalog by selecting the corresponding radio button.

4. For Save options, you can change the part of the Savediag Directory field that follows the underscore, which is the time.

5. For Post options, you can enter information in the Comments field.

6. For Save options, enter applications in the List of Applications field.

7. For Post options, enter the case number you received from Customer Support Services in the Case Number field.

8. For Post options, enter the information you received from Customer Support Services in the Post ID and Post Password fields. This information in required to access the Customer Support Services FTP site.

9. Click Submit.

If you selected a Post option, your information is posted on the Customer Support Services FTP site. If not, the information is saved to the Savediag Directory folder.

Note: If you choose the Delete existing Diagnostics option, select a folder from the Delete Savediag Directory drop-down menu and click Submit.
Procedure: How to Report Server Related Problems From the Command Line

In order to provide Information Builders Customer Support Services with a proper reproduction of your problem, follow these steps:

Note: The use of edastart in this procedure assumes that the directory for the edastart script has been added to the system search path for your platform (or that another method for locating and using edastart has been used). If this is not the case, you must preface edastart with its path when you enter it here.

1. Turn traces on with the command edastart -traceon. Initially starting the server with traces is strongly recommended.

2. Reproduce the problem while traces are on.

3. If the application abends, write the core dump information to the edaprint.log file using one of the following techniques:

   - To create the log from the Web Console menu bar, select Workspace, Diagnostics, Server Log, then click WRITE IBISNAP Information To Current Log.
   - To create the log manually, issue the edastart -ibisnap command.

4. Use the edastart -savediag command to gather and send files to the support FTP site as an archive (using the archive method required on your platform). The edastart -savediag command includes options for saving and FTPing, saving locally, and FTPing a prior local save. The system prompts as follows:

   Select an option (type Q to quit for most prompts):
   1. Save diagnostic to a directory and FTP post
   2. Save diagnostic to a directory
   3. FTP post prior diagnostic from a directory

   Enter a selection (Default=1) : 1

   For related information, see Files Gathered by the edastart -savediag Command on page 691.

   Note: Typically, users save and post in one operation (the default), however, you may wish to consider the following reasons for saving and posting as separate steps:

   - If you have multiple reproduction variations, you may wish to confirm them all first, then ship them to Customer Support Services.
   - If you wish to reproduce multiple separate problems, the two-part option enables you to save each one separately, then ship.
   - If the server cannot be shut down (and edastart -cleardir cannot be used), the two part option may enable you to delete unneeded items before shipping.
For security/privacy reasons, items need to be reviewed and possibly cleansed before shipping.

**Procedure: How to Report edastart -t, -x, or -f Problems Outside the Server Environment**

If a problem occurs on the Server environment, attempting to reproduce it in a free-standing environment may facilitate troubleshooting. If you wish to try this strategy, follow these steps.

1. Create a reproduction application directory (preferably called repro or repro_case#).
2. Place the required files (*.fex, *.mas, and so on) that are not already in APP PATH in the reproduction application directory.
3. Physically switch to the reproduction application directory so that traces and other files go to this known location.
4. Run the desired request with the command:
   ```
   edastart -traceon {-t|-x|-f}
   ```
   where:
   ```
   -t, -x, -f
   ```
   Are three separate trace modes.
5. If the server edatemp directory is not needed to reproduce the problem, shut the server down and issue the edastart -cleardir command so that edatemp is not captured during -savediag processing.
   **Note:** If the server must be kept running 24x7, skip this shutdown step and proceed to step 6.
6. Issue the edastart -savediag command, specifying the repro application directory (and any other needed directories) in order to gather and send files to the support FTP site as an archive (using the archive method required on your platform). The edastart -savediag command includes options for saving locally, saving and FTPing, and FTPing a prior local save. Choose:
   ```
   1. Save diagnostic in a new directory and post
   2. Save diagnostic in a new directory
   3. Post diagnostic from an existing directory
   ```
   ```
   Enter a selection (Default=1) :   2
   ```
   For related information, see *Files Gathered by the edastart -savediag Command* on page 691.
7. Restart the server to resume normal operation.
In the case of an abend (core dump), Information Builders may ask that debuggables be installed (as described in the software installation manual) and that the repro/savediag steps be repeated with IBI_DBGLIB=ON to gather more detailed information. Do not install debuggables or perform these steps unless requested by Information Builders.

Reference: Files Gathered by the edastart -savediag Command

- Server log ($EDACONF/edaprint.log)
- Traces and other contents from the $EDACONF/edatemp/... directory, including the following:

<table>
<thead>
<tr>
<th>File</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>edachkup.trc</td>
<td>Daemon check up facility trace</td>
</tr>
<tr>
<td>edapdfm.trc</td>
<td>Deferred Listener trace</td>
</tr>
<tr>
<td>edaplog.trc</td>
<td>EDAPRINT log daemon trace</td>
</tr>
<tr>
<td>fds.trc</td>
<td>FDS trace</td>
</tr>
<tr>
<td>jscom*.trc</td>
<td>Java traces</td>
</tr>
<tr>
<td>edapth.trc</td>
<td>Main workspace manager trace</td>
</tr>
<tr>
<td>edaphtp.trc</td>
<td>HTTP communication traces (listener)</td>
</tr>
<tr>
<td>ht000nnn.trc</td>
<td>HTTP communication traces (threads)</td>
</tr>
<tr>
<td>edaptcp.trc</td>
<td>TCP/IP communication traces (listener)</td>
</tr>
<tr>
<td>ip000nnn.trc</td>
<td>TCP/IP communication traces (threads)</td>
</tr>
<tr>
<td>ts000nnn.trc</td>
<td>Agent traces</td>
</tr>
</tbody>
</table>

- Server configuration ($EDACONF/bin/edaserve.cfg).
- Profiles from $EDACONF/etc/edasprof.prf and ibi/profiles/*. 
- Listener traces (.ht and .hs).
- Deferred execution (.aq and .df).
- Scheduler (.cm and .sh).
Example: Sample edastart -savediag Processing With Variations

The following sample includes annotations that indicate what is happening as the process runs.

$ bin/edastart -savediag

A log of environment information is displayed.

.
.
.

Select an option (type Q to quit for most prompts):
1. Save diagnostic to a directory and FTP post
2. Save diagnostic to a directory
3. FTP post prior diagnostic from a directory

Enter a selection (Default=1) : 1

Enter directory path for diagnostic information

(Default=/u1/prod/iadmin/ibi/srv71/ffs/sd122905_110820)

Please supply location or <Enter>:
/u1/prod/iadmin/ibi/srv71/ffs/myrepro

Enter space separated non mapped application names to save in the diagnostic or ALL for all non mapped application names
(Default= baseapp): repro

12/29/2005 11:08:49


Repro is the application directory for the saved application. myrepro is the directory in which the information generated by -savediag will be saved.

A log of file copies is displayed. Note that some copy errors are normal since the process is trying to catch files (like those used for NLS set up), which users may or may not have.

12/29/2005 11:08:50 Diagnostic Information has been saved in /u1/prod/iadmin/ibi/srv71/ffs/myrepro

If you selected Option 2, Save diagnostic to a directory, - savediag processing stops here.
If you selected Option 3, FTP post prior diagnostic from a directory, -savediag processing provides the next prompt.

Enter existing directory path with diagnostic information to post (Default=/u1/prod/iadmin/ibi/srv71/ffs/sd122905_111616)
Please supply location or <Enter>:  /u1/prod/iadmin/ibi/srv71/ffs/myrepro

It then continues as Option 1 would have.

Please enter Hottrack Case number to post (8 digits or more):  999999999
Please enter user id on cssftp.ibi.com (Default=incmgr):
Please enter comments for the Hottrack Case 999999999.
Enter as many lines as needed, blank line indicates end of comments.
My reproduction for error
12/29/2005 11:09:37 Creating myrepro.tar to post savediag information
Please supply confirmation to proceed with posting (Y/N/Q Default=Y):  Y

Note:

- An FTP log of posting activities is displayed.
- As a final step, an HTTP message is sent silently to Customer Support Services. This triggers a confirmation email to the customer and alerts Customer Support Services systems that a –savediag has arrived.
Unicode Support

Unicode is a universal character encoding standard that assigns a code to every character and symbol in every language in the world. Since no other encoding standard supports all languages, Unicode is the only encoding standard that ensures that you can retrieve or combine data using any combination of languages.

In this appendix:

- Unicode and the WebFOCUS Reporting Server
- Accessing Unicode Data
- Selecting, Reformatting, and Manipulating Characters
- Sort Order Under Unicode
- Added Unicode Support for Master Files, Data Files, and Application Directory Names
- Unicode PDF Output

Unicode and the WebFOCUS Reporting Server

The WebFOCUS Reporting Server supports a Unicode Transformation Format (UTF) called UTF-8 in ASCII environments, and UTF-EBCDIC in EBCDIC environments:

- **For ASCII**, the UTF-8 encoding standard assigns each character of each language a code that can be from 1-3 bytes long. The codes assigned to European characters are 1 or 2 bytes long, Middle Eastern characters are 2 bytes long, and those assigned to Asian characters are 3 bytes long. This standard is compatible with ASCII format because the first 128 UTF-8 codes have the same 1-byte representation as the corresponding ASCII codes.

- **For EBCDIC**, the UTF-EBCDIC encoding standard assigns each character a code that can be from 1-4 bytes long. EBCDIC characters, including C1 control characters, have the same 1-byte representation in UTF-EBCDIC.
In non-Unicode single-byte encoding standards, such as ASCII, each character is assigned a code that is 1 byte long, limiting the number of characters that can be represented by the standard. When using those standards, it became common to equate a character with a byte of storage. If you had a string of 10 characters, the amount of storage needed was 10 bytes, and many character manipulation routines expected character string lengths to be specified as a number of bytes.

With Unicode encoding, bytes and characters are no longer equated: characters are represented internally by a varying number of bytes, depending on the character. If you configure the server for Unicode, you define the length of strings and alphanumeric fields in terms of characters, not bytes. This simplifies specifying string and field lengths. Each character is represented internally by up to 3 bytes, and the server automatically adjusts for the actual storage length. In reports, each character displays in a report column using one space, regardless of how many bytes it takes up in memory. This character-based processing mode employed for Unicode environments is called character semantics. The non-Unvcode mode is called byte semantics.

Procedures that had been developed using byte semantics will continue to work when deployed in a Unicode environment, without adjustment, in most cases.

To compress trailing blanks and display columns as the width of the largest actual data value, issue the SET SQUEEZE=ON command. For more information on the SQUEEZE parameter, see the chapter on Formatting Report Data in the Creating Reports With WebFOCUS Language manual.

The main benefit of the new system is the ability to have multiple languages (both European and Asian) in the following WebFOCUS and Dialogue Manager objects:

- Titles, descriptions, and names in synonyms.
- Headings and prompts in procedures.
- Data for all supported adapters (for example, SAP BW, SAP R/3-ECC, Oracle, Db2, Sybase ASE, Sybase IQ, Teradata, MySQL, Web Services, Fixed files). For more information, see Accessing Unicode Data on page 697.

**Procedure:** How to Configure the Server for Unicode

To configure the server for UTF-8 or UTF-EBCDIC character encoding:

1. From the menu bar, select *Workspace*.
2. From the navigation pane, right-click the *Workspace* folder, and select *NLS*.

   The NLS Configuration Wizard pane opens.
3. Select 65001 - Unicode (UTF-8) or 65002 - Unicode (UTF-EBCDIC) from the CODE_PAGE drop-down list.

The server will be configured for Unicode once you save this configuration.

**Accessing Unicode Data**

To find out which adapters support Unicode:

1. Go to the Adapters page on the Web Console.
2. Click Complete Adapter List.

This opens a list of all adapters. There is a Unicode column. The value Opt in this column indicates that the adapter supports Unicode.

Relational adapters in a Unicode environment assume that the DBMS returns character data to the server already converted to Unicode. The relational adapters convert data to the correct DBMS API when writing to a relational data source (for example, Oracle to UTF-8, Microsoft SQL Server to UTF-16, and Db2 on MVS to UTF-EBCDIC).

XML-based adapters (the Adapter for XML, and the Adapter for XBRL) obtain the code page from the XML declaration of the processed XML document. For more information, see [http://www.w3.org/TR/REC-xml#sec-prolog-dtd](http://www.w3.org/TR/REC-xml#sec-prolog-dtd).

The Adapter for Web Services generates SOAP requests using the UTF-8 code page.

**Reference: Unicode Considerations for Oracle**

The adapter supports Unicode data in Oracle release 10g or higher databases that have been configured with the NLS_CHARACTERSET parameter set to UTF8. You must set the NLS_LANG environment variable in the edastart file, in a separate shell file, in a database profile, or in a user profile.

Set NLS_LANG using the following syntax

```
NLS_LANG = language_territory.charset
```

where:

- `language`
  - Is the selected language.

- `territory`
  - Is the name of the country associated with the selected language.
characterset

   Is the value of the NLS_CHARACTERSET variable that is set in the Oracle database. For
Unicode, this is always UTF8.

   For example, for American English UTF-8, you would use the following setting:

   **NLS_LANG=American_America.UTF8**

   For information about data type support, see *Relational Adapter Data Type Support for Unicode*
on page 701.

**Reference:** Unicode Considerations for Db2

   Information Builders supports Db2 databases, version 8 and higher. To prepare the Db2
environment for Unicode on:

- **Windows,** the database must have been created with the option CODESET UTF-8, and you
  must add the following variable to the environment using Windows or in the edastart file:

  **DB2CODEPAGE=1208**

- **UNIX,** the database must have been created with the option CODESET UTF-8, and you must
  set the LANG and NLS_LANG environment variables in the edastart file or in a separate
  shell file.

  For example, for American English, you would export the following variables:

  **export LANG=EN_US.UTF-8**
  **export NLS_LANG=American_America.UTF8**

- **z/OS,** the database must have been created with the CCSID UNICODE option, and you
  must ensure that the DSNAOINI environment variable points to a configuration file
  containing the following specification:

  **CURRENTAPPENSCH=UNICODE**

   The adapter supports Unicode only with the CLI interface.

   In a Unicode environment, the Adapter for Db2 requires a BIND command for PREPARE/
EXECUTE logic using parameter markers.

   For information about data type support, see *Relational Adapter Data Type Support for Unicode*
on page 701.
IBM i, Unicode is only supported in Db2 CLI mode. Db2 allows column-by-column specification of CCSID information at CREATE TABLE time and the columns may or may not be explicitly Unicode 1208 and 1200, however, all CCSIDs are transcoded to the server as CSID 1208 UTF8. Thus, any existing table may be used in a Unicode configuration regardless of its underlying CCSID specifications.

Reference: Unicode Considerations for Sybase ASE

The adapter supports Unicode data in Sybase ASE version 15.0 and higher databases that have been created with the CHARACTER SET option set to UTF-8. You must set the LANG and NLS_LANG environment variables in the edastart file or in a separate shell file before starting the server.

For example, for American English, you would export the following variables:

```bash
export LANG=EN_US.UTF-8
export NLS_LANG=American_America.UTF8
```

For information about data type support, see Relational Adapter Data Type Support for Unicode on page 701.

Reference: Unicode Considerations for Sybase IQ

Beginning with Sybase IQ version 12.7, the adapter supports Unicode data in Sybase IQ databases that have been created with the UTF-8 character set. You must set the LANG and NLS_LANG environment variables in the edastart file or in a separate shell file before starting the server.

For example, for American English, you would export the following variables:

```bash
export LANG=EN_US.UTF-8
export NLS_LANG=American_America.UTF8
```

For information about data type support, see Relational Adapter Data Type Support for Unicode on page 701.

Reference: Unicode Considerations for Microsoft SQL Server

The adapter, using the OLE DB interface, supports Unicode data stored in NCHAR and NVARCHAR fields (where N stands for national). N columns can support data of any language or combination of languages.

For information about data type support, see Relational Adapter Data Type Support for Unicode on page 701.
**Reference: Unicode Considerations for Teradata (CLI)**

The Adapter for Teradata (CLI) supports Unicode UTF-8 format if:

- The Teradata CLI client components are part of release TTU8.0 or higher.
- The Teradata database is release V2R6.0 or higher and appropriate language support was enabled during the sysinit process.

Contact your database administrator (DBA) to determine whether international language support has been enabled in your Teradata system and/or consult the Teradata documentation for details about International Character Set support.

Note that, at the present time, when Unicode is enabled the length of a Teradata Column Name and/or TITLE cannot exceed 21 characters (bytes).

For information about data type support, see [Relational Adapter Data Type Support for Unicode](#) on page 701.

**Reference: Unicode Considerations for MySQL**

The Adapter for MySQL is implemented using JDBC. This implementation supports Unicode data stored in character fields with CHARACTER SET set to UTF-8.

You must set the LANG environment variable in the edastart file or in a separate shell file before you start the server. For example, for American English you would export the following variable:

```
export LANG=EN_US.UTF-8
```

For information about data type support, see [Relational Adapter Data Type Support for Unicode](#) on page 701.
**Reference:** Relational Adapter Data Type Support for Unicode

In Unicode databases the information in CHAR(n) columns is stored in a UTF-8 encoding scheme. Most RDBMS Unicode columns of CHAR type specify length in bytes, not characters. The B-modifier in the Actual format denotes that a character column with a fixed byte length might contain a varying number of UTF-8 characters. This is reflected in the AnV Usage format.

<table>
<thead>
<tr>
<th>DBMS</th>
<th>Column Type</th>
<th>Usage</th>
<th>Actual*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Db2</td>
<td>CHAR(n)</td>
<td>AnV</td>
<td>AnB</td>
</tr>
<tr>
<td></td>
<td>GRAPHIC(n)</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>VARCHAR(n)</td>
<td>AnV</td>
<td>AnVB</td>
</tr>
<tr>
<td></td>
<td>VARGRAPHIC(n)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td>Microsoft SQL Server</td>
<td>CHAR(n) single byte code page</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>CHAR(n) double byte code page</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td></td>
<td>NCHAR(n)</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>VARCHAR(n)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td></td>
<td>NVARCHAR(n)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td>MySQL</td>
<td>CHAR(n)</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>VARCHAR (n)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td>Oracle</td>
<td>CHAR(n CHAR)</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>CHAR(n BYTE)</td>
<td>AnV</td>
<td>AnB</td>
</tr>
<tr>
<td></td>
<td>NCHAR(n)</td>
<td>An</td>
<td>An</td>
</tr>
<tr>
<td></td>
<td>VARCHAR(n CHAR)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td></td>
<td>VARCHAR(n BYTE)</td>
<td>AnV</td>
<td>AnVB</td>
</tr>
<tr>
<td></td>
<td>NVARCHAR(n)</td>
<td>AnV</td>
<td>AnV</td>
</tr>
<tr>
<td>DBMS</td>
<td>Column Type</td>
<td>Usage</td>
<td>Actual*</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------</td>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>Sybase ASE</td>
<td>CHAR($n$)</td>
<td>A$n$</td>
<td>A$nB$</td>
</tr>
<tr>
<td></td>
<td>UNICHAR($n$)</td>
<td>A$n$</td>
<td>A$n$</td>
</tr>
<tr>
<td></td>
<td>VARCHAR($n$)</td>
<td>A$nV$</td>
<td>A$nVB$</td>
</tr>
<tr>
<td></td>
<td>UNIVARCHAR($n$)</td>
<td>A$nV$</td>
<td>A$nV$</td>
</tr>
<tr>
<td>Sybase IQ **</td>
<td>CHAR($n$)</td>
<td>A$n$</td>
<td>A$nB$</td>
</tr>
<tr>
<td></td>
<td>VARCHAR($n$)</td>
<td>A$nV$</td>
<td>A$nVB$</td>
</tr>
<tr>
<td>Teradata</td>
<td>CHAR($n$)</td>
<td>A$n$</td>
<td>A$n$</td>
</tr>
<tr>
<td></td>
<td>VARCHAR ($n$)</td>
<td>A$nV$</td>
<td>A$nV$</td>
</tr>
</tbody>
</table>

* Note that on EBCDIC platform(s) the ACTUAL size for a B-suffixed format is increased 1.5 times to accommodate the expansion when converting from UTF-8 to UTF-EBCDIC. For example, on MVS the synonym created for a Db2 CHAR(10) column contains the following: USAGE=A10, ACTUAL=A15B.

**Note the following limitation for Sybase IQ:** You cannot use the HOLD FORMAT SYBASE command with the Unicode implementation of Sybase IQ since this command depends on the availability of UNICHAR and UNIVARCHAR data types, which are not supported by Sybase IQ.

**Reference:** Unicode Considerations for SAP BW and SAP R/3-ECC

SAP uses UTF-16 encoding in its Unicode system. The server uses UTF-8 and handles all conversions between the two encoding schemes. The server may not need to be configured for Unicode when accessing the SAP Unicode system.

NLS settings for the server must be configured in such a way that the server code page can handle the list of chosen languages. For example, ISO 8859-1 can accommodate most Western European languages. The 8859 family can handle character specifics with the lower set almost being mapped to US ASCII. Therefore, with 8859-1 one could request English, German, French, and Spanish. When a character set requires a code page that takes more than one byte per character (for example, many Asian languages), the only choice for the server is 65001 (UTF-8).
The adapters provide access to Unicode SAP BW and SAP ECC systems, respectively. This extends support of data and metadata in multiple languages to the server, consistent with support by the SAP server. A synonym can be created using one or more languages. Those languages will be used to create titles and descriptions.

- For SAP BW, the userid and password in the sapserv.cfg file must be able to connect to SAP BW using the enumeration of desired languages.

- For SAP R/3-ECC, the server logon language is used to retrieve all languages.

**Reference:** Unicode Considerations for Fixed-Format Sequential Files

When retrieving a fixed-format sequential file, the server attempts to determine the code page the file was meant to be retrieved with by checking the Master File CODEPAGE attribute. If the Master File does not contain the CODEPAGE attribute, the server code page is used to read the file.

If you use the Data Management Console to generate a data flow that creates a fixed-format sequential file, you can specify a code page in the Data Management Console. DataMigrator will then create the fixed-format file in a way that can be read by the server when that server has been configured for the specified code page.

In a Unicode configuration, HOLD files in BINARY and ALPHA formats are created using UTF-8 conversion, which assigns each character three bytes of storage in ASCII environments or four bytes in EBCDIC environments. Fields defined in the Master File using the data type A in both the USAGE and ACTUAL attributes are described in terms of characters. Fields defined using any other combination of USAGE and ACTUAL attribute values are described in terms of bytes.

To force a field in a fixed-format sequential file to be described in terms of bytes, add B to the end of the ACTUAL attribute. For example, to specify that a field is stored in 10 bytes, you would specify:

```
ACTUAL=A10B
```

The adapter will then read the specified number of bytes from the record and convert their contents to the number of characters specified by the file code page.

Regardless of how much storage a character occupies, it occupies only one space on a report, as always.
Selecting, Reformatting, and Manipulating Characters

In character semantics mode, selection tests against a mask are automatically adjusted to work with characters rather than bytes. Formats assigned by reformatting a field in a request or by defining a temporary field are interpreted in terms of characters. Character functions interpret all lengths in terms of characters.

**Example:** Defining a Virtual Field

Consider the following DEFINE in the Master File for the EMPLOYEE data source:

```
DEFINE FIRST_ABBREV/A5 WITH FIRST_NAME = EDIT(FIRST_NAME, '99999$$');$
```

In character semantics mode, format A5 is interpreted as five characters (up to 15 bytes on ASCII platforms, up to 20 bytes on EBCDIC platforms), and the comparison is performed based on this number of bytes. In byte semantics mode, format A5 is interpreted as five bytes, and the comparison is performed based on five bytes. In either case, the correct characters are compared and extracted.

**Example:** Reformatting a Field

Consider the following PRINT command:

```
PRINT FIELD1/A10
```

In character semantics mode, format A10 is interpreted as 10 characters (up to 30 bytes), meaning that up to 30 bytes must be retrieved when this field is referenced. In byte semantics mode, format A10 means that 10 bytes will be retrieved. In either case, the field displays as 10 characters that take up 10 spaces on the report output.

**Reference:** Character Functions That Support Character Semantics

In character semantics mode, all character manipulation functions interpret lengths in terms of characters. The following functions operate on alphanumeric strings in character semantics mode when Unicode is configured:

- **String manipulation and extraction functions.**
  - GETTOK, OVRLAY, PARAG, REVERSE, SQUEEZ, STRIP, SUBSTR, SUBSTV, TRIM, TRIMV

- **Justification functions.**
  - CTRFLD, LJUST, RJUST

- **Length and position functions.**
  - ARGLEN, LENV, POSIT, POSITV
- **Format conversion functions.**
  EDIT

- **Decoding, comparison, and editing functions.**
  CHKFMT, EDIT, DECODE, SOUNDEX

- **String replacement functions.**
  CTRAN, HEXBYT, BYTVAL (see notes below), STRREP

- **Case translation functions.**
  LCWORD, LOCASE, LOCASV, UPCASE, UPCASV

**Note:** The HEXBYT, BYTVAL, and CTRAN functions have been extended to handle multibyte characters in Unicode configurations. These functions use or produce numeric values to represent characters. In Unicode configurations, they use or produce values in the range:

- 0 to 255 for 1-byte characters
- 256 to 65535 for 2-byte characters
- 65536 to 16777215 for 3-byte characters
- 16777216 to 4294967295 for 4-byte characters (primarily for EBCDIC)

To find the numeric value corresponding to a given character, find its hexadecimal code and convert to decimal with a hex calculator such as the Windows XP Calculator program. (Make sure to use the UTF-8 or UTF-EBCDIC code, not the Unicode code point, which would be the UTF-16 value.)

For example, assume you would like to create a variable of format A1 containing the euro sign. The euro sign in UTF-8 is, in hex, E282AC. Converting this to decimal gives 14849492. Thus, the proper DEFINE or COMPUTE would be:

```
EUROSIGN/A1 = HEXBYT(14849492, 'A1');
```

If you are creating a FOCEEXEC with a UTF-8 compliant editor, you can also get the value of the euro sign in this way:

```
EUROVAL/I8 = BYTVAL('€', 'I8');
```
The CTRAN function replaces all occurrences of a character in a string with another character, given the decimal values that represent the hexadecimal codes for the two characters. Traditionally, this technique was used to replace characters that were difficult to input directly. Decimal values of characters can be complicated to determine. Therefore, if you want to replace characters or character strings that you can input directly using a UTF-compliant text editor, Information Builders recommends that you use the STRREP string replacement function.

The following translates all of the euro signs in a 40-character UTF-8 field to pound sterling signs (£ = C2A3 or 49827):

```
NEWFLD/A40 = CTRAN(40, OLDfld, EUROVAL, 49827, 'A40');
```

Sort Order Under Unicode

Sort order is based on the binary values assigned to the characters. When the server is configured for Unicode, the sort order is based on the Unicode encoding standard. If ascending values of the codes correspond to the alphabetical order of the letters in the language being used, a report can be sorted in alphabetical order. This is entirely dependent on the encoding standard and its mapping of codes to letters. In many, but not all cases, the encoding standard assigns codes in the alphabetical order of each language.

For example, Ukrainian added a new letter (Cyrillic capital letter ghe with upturn) to its alphabet after the UTF-8 coding specification had already been set. This letter was not assigned a code that sorts it alphabetically, either in Unicode or in code page 1251 (used for Ukrainian). It sorts differently and incorrectly using either encoding scheme.

- With code page 1251, this letter sorts as the first letter on the report output.
- With UTF-8, this letter sorts as the last letter on the report output.

To determine whether a language sorts alphabetically, you can examine the hexadecimal codes assigned to its letters on the code page you are using and check whether ascending hexadecimal codes match the alphabetical order.

Added Unicode Support for Master Files, Data Files, and Application Directory Names

Support for UTF-8 file names is now available for Master Files, Data Files, and Application Directory names.
Unicode PDF Output

Reporting from a Unicode data source with PDF output format is available when using the following two fonts which support Unicode characters:

- Lucida Sans Unicode, which is used to display single-byte characters only. This font is available on Windows version 2000 and higher.

- Arial Unicode MS, which is used to display both single-byte and double-byte characters. This font can be installed as an option from the Microsoft Office CD, version 2000 and higher.

The Lucida Sans Unicode font is the default font if the WebFOCUS Reporting Server is configured for UTF-8 (code page 65001) or UTF-EBCDIC (code page 65002).

If the server is configured for Unicode, and you want to use the Arial Unicode MS font instead, you must specify the Arial Unicode MS font in the StyleSheet. Alternatively, if the WebFOCUS PDF font mapping file (for example, EDAHOME NLS pdf.fmp) has DEFAULT-FONT=YES specified for Arial Unicode MS, then it becomes the default font. For example:

```
font=Arial Unicode MS, style=normal, metricsfile=PDARUM APM *, DEFAULT-FONT=YES, $
```

For more information about how to use the PDF font mapping file, see the Creating Reports With WebFOCUS Language manual.
Environment variable EDAEXTSEC is only used to override the security provider setting that is stored in edaserve.cfg file in order to start the server with security OFF.

In this appendix:

- Platform-Specific Methods for Setting EDAEXTSEC

### Platform-Specific Methods for Setting EDAEXTSEC

<table>
<thead>
<tr>
<th>Platform</th>
<th>Start Method</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Windows</td>
<td>Start Menu</td>
<td>Under the main software folder for the server, select Start Security ON or Start Security OFF.</td>
</tr>
<tr>
<td></td>
<td>As a Service under a local system account</td>
<td>Set the system environment variable EDAEXTSEC, under My Computer, Properties, Advanced tab, to OFF. Restart Windows to initialize.</td>
</tr>
<tr>
<td></td>
<td>As a Service under the current account</td>
<td>Set the system environment variable EDAEXTSEC, under My Computer, Properties, Advanced tab, to OFF. Restart Windows to initialize.</td>
</tr>
<tr>
<td>UNIX</td>
<td>Command prompt or Script that calls edastart</td>
<td>Export the variable setting in the edastart shell script, or before any calls to the shell script, as follows: export EDAEXTSEC=OFF</td>
</tr>
<tr>
<td>z/OS Unified Server</td>
<td>JCL</td>
<td>Place the variable in the EDAENV allocation of the IRUNJCL member of the configuration library EDAEXTSEC=OFF</td>
</tr>
</tbody>
</table>
Platform-Specific Methods for Setting EDAEXTSEC

<table>
<thead>
<tr>
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<th>Start Method</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>IBM i</td>
<td>QSH command prompt or QSH script that calls edastart</td>
<td>Export the variable in the edastart shell script, or before any calls to the shell script, as follows:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><code>export EDAEXTSEC=OFF</code></td>
</tr>
<tr>
<td></td>
<td>CALL (lib)/TSCOM300 or CL that calls TSCOM300 or CL that calls QSH, which, in turn, calls the edastart shell script</td>
<td>Before the call to TSCOM300, add the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><code>ADDEVENVAR ENVVAR(EDAEXTSEC) VALUE(OFF)</code></td>
</tr>
<tr>
<td>OpenVMS</td>
<td>Command prompt or DCL script that calls edastart</td>
<td>Before calling edastart.com or in edastart.com, add the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><code>DEFINE EDAEXTSEC OFF</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can also define the logical EDAEXTSEC in the EDAENV.COM file.</td>
</tr>
<tr>
<td>Any</td>
<td>Any</td>
<td>Use the Web Console (Workspace, Configuration Files folder, Miscellaneous folder, Environment - edaenv.cfg) to edit the edaenv.cfg file and add the following:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><code>EDAEXTSEC=OFF</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Note:</strong> After a change, a hard restart of the server must be done.</td>
</tr>
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WebFOCUS

Server Administration
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DataMigrator Server Release 7707