

WebFOCUS

Using the WebFOCUS Home Page
Release 8.2 Version 03

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Introducing WebFOCUS and the Home Page

WebFOCUS is a comprehensive BI platform, helping organizations deliver information and analytics to the widest range of users. It enables any executive, manager, analyst, employee, partner, or customer to execute smarter business from trusted data. The platform delivers many rich new capabilities and integrates the four critical elements for smarter decision-making: business intelligence, performance management, advanced analytics, and data integrity.

WebFOCUS provides a comprehensive portfolio of centralized and decentralized BI capabilities, including data management, visual discovery, predictive analytics, and operational intelligence in a single platform. With WebFOCUS, companies can accelerate the delivery of comprehensive and intuitive BI solutions internally and externally, and build rich, secure information systems and applications that can be deployed on premises, in the cloud, on mobile devices, or as software-as-a-service (SaaS) applications.

This topic introduces the WebFOCUS Home Page, as well as the features, functionality, and WebFOCUS tools that you can use to get started with WebFOCUS.

In this chapter:

- ❑ [Signing in to WebFOCUS](#)
 - ❑ [Navigating the WebFOCUS Home Page](#)
-

Signing in to WebFOCUS

You can launch WebFOCUS from any web browser, using the address created during the installation. The sign-in page and default home page may be different depending on the configuration requirements of your organization.

To learn more about the installation process, see the *WebFOCUS Installation and Configuration* manual.

Procedure: How to Launch WebFOCUS

1. In your browser, go to the following page:

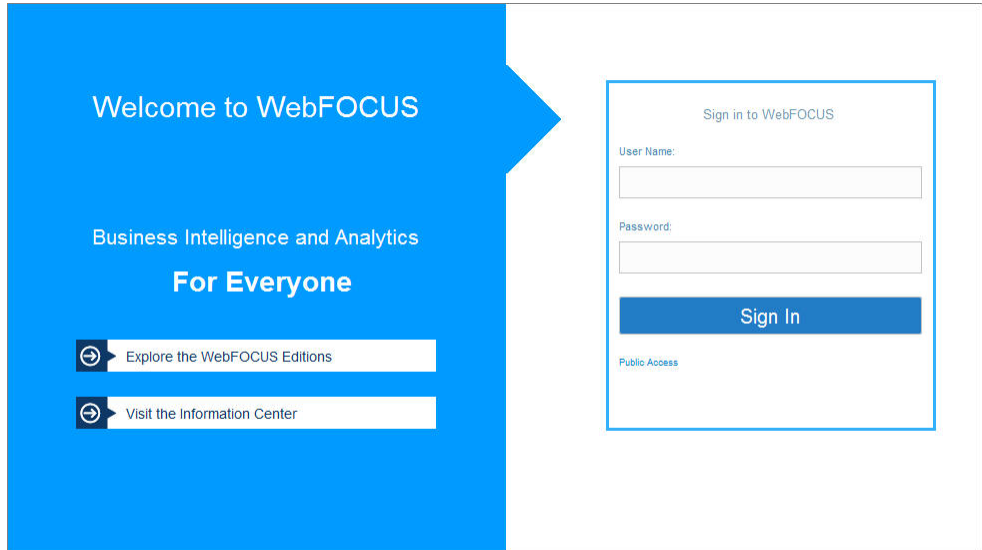
http://hostname:port/ibi_apps

where:

hostname:port

Are the host name and HTTP port of the web server or application server.

The default WebFOCUS Sign In page opens, as shown in the following image.

The image shows the WebFOCUS Sign In page. On the left, a large blue banner contains the text "Welcome to WebFOCUS" at the top, followed by "Business Intelligence and Analytics" and "For Everyone" in a larger font. Below this, there are two buttons: "Explore the WebFOCUS Editions" and "Visit the Information Center", each with a right-pointing arrow icon. On the right side of the page, there is a white box with a blue border containing the sign-in form. The form has the title "Sign in to WebFOCUS" at the top. It includes a "User Name:" label above a text input field, a "Password:" label above another text input field, a blue "Sign In" button, and a "Public Access" link at the bottom.

2. Type your user name and password. For example, if you are an administrator, you can type admin/admin.
3. Click *Sign In*.

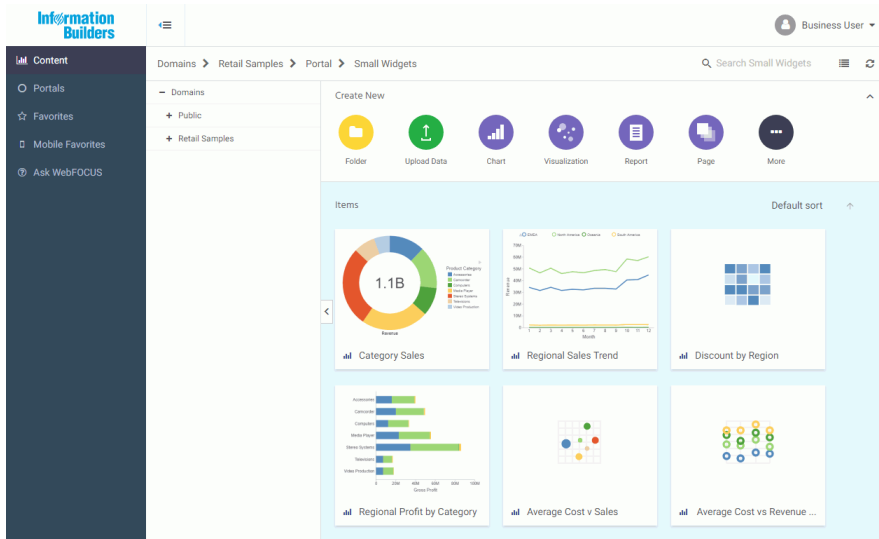
The home page loads and shows all the content that you are authorized to see.

Note: You can also reconfigure WebFOCUS to run the Legacy Home Page or a custom welcome page after sign-in. This behavior is configured by setting the *Redirect /ibi_apps* to setting on the BI Portal page, in the Administration Console.

Navigating the WebFOCUS Home Page

The Home Page is the default landing page that opens when you first sign in to WebFOCUS. It serves as a centralized place for creating, organizing, and sharing content, performing administrative tasks, scheduling reports and procedures, and working with your data. These functions are controlled by the permissions that are assigned to role of a user. To learn more about the available roles in WebFOCUS, see the *WebFOCUS Security and Administration* technical content.

The default Home Page is shown in the following image. The appearance of this page may vary, depending on the configuration or setup of your organization. For example, the administrator in your organization may configure a custom sign-in page and home page.



The main elements of the Home Page are:

- ☐ Banner
- ☐ Sidebar
- ☐ Explorer


Banner

The banner is located on the upper-right corner of the Home Page.

From the banner, you can access the User menu, from which you can perform the following tasks:

- ☐ Administration:
 - ☐ Access the Security Center, where you define users and groups, and grant access permissions.
 - ☐ Access the Administration Console, where you configure, administer, and monitor the components of the WebFOCUS environment.
 - ☐ Access the Magnify Console, where you specify settings, configure security, and perform maintenance and diagnostic tasks for Magnify.

- ☐ View and administer private resources for groups and users.
- ☐ Switch between Normal mode, seeing your own content, and Manager mode, managing other user content.
- ☐ Tools:
 - ☐ Access the ESRI Configuration Utility to create or edit a file.
 - ☐ View the status of deferred reports, and manage them.
 - ☐ Stop outstanding interactive requests that are running.
 - ☐ Access the ReportCaster Explorer, where you view ReportCaster content within columns that provide detailed information specific to the displayed ReportCaster item, such as Schedules, Distribution Lists, Library Access Lists, Library Reports, and Watch List Reports.
 - ☐ Access the ReportCaster Status, where you view the status of your scheduled jobs and log reports. Authorized users can also view the status of the ReportCaster Distribution Server and perform configuration and administration tasks.
 - ☐ Access the Magnify Search Page.
- ☐ Configure the Home Page preferences.
- ☐ Access the online Help and other resources, including the WebFOCUS Information Center, Information Builders web site, and Community.
- ☐ Access the Legacy Home Page.
- ☐ Change your password.
- ☐ Sign out of WebFOCUS.

From the banner, you can also toggle the sidebar. Click the toggle button  to expand or collapse the sidebar.

Note: Expanding or collapsing the sidebar is remembered as a preference. The last status of the sidebar before you sign off is applied when you sign in.

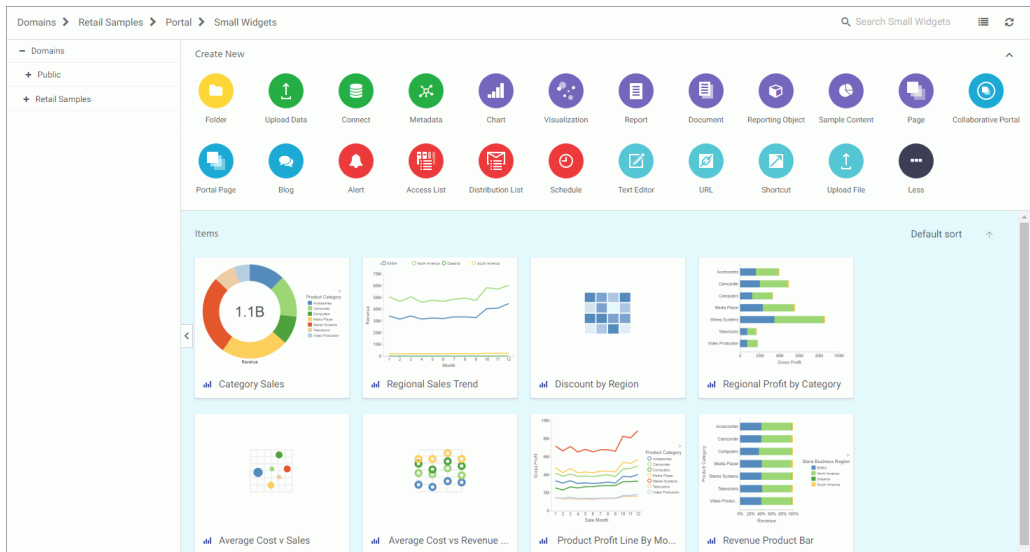
Sidebar

You can use the sidebar to switch between five views of your repository content. These include:

- ❑ **Content.** Displays your repository content and provides options so you can create, share, and modify domains and content. Here, you can also upload files and spreadsheets, connect to data, create portals and pages, and generate sample content.
- ❑ **Portals.** Displays all of the existing portals in your repository. If tags are created for these portals, tag buttons display on top of the portals.
- ❑ **Favorites.** Displays the items that you designate as favorites. To designate an item as a Favorite, right-click the item, and click *Add to Favorites*.
- ❑ **Mobile Favorites.** Displays the items that you designate as Mobile Favorites. To designate an item as a Mobile Favorite, right-click the item, and click *Add to Mobile Favorites*.
- ❑ **Ask WebFOCUS.** Provides access to WebFOCUS InfoSearch, where you can search your repository for content and data values, compare statistics, and perform other analytical tasks. To use WebFOCUS InfoSearch, type your inquiry in the search field or click the microphone icon and ask a question.

WebFOCUS Explorer

The WebFOCUS Explorer is the main component of the Home Page. Here, you can create and interact with content, work with data, create sample content, organize your repository structure and perform other essential tasks. The WebFOCUS Explorer is shown in the following image.



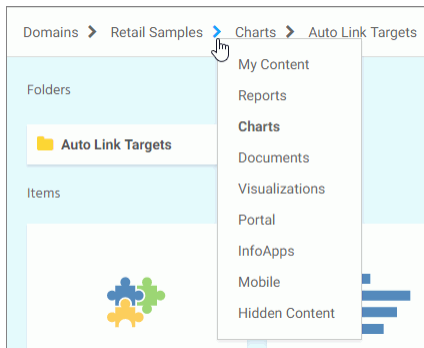
The WebFOCUS Explorer consists of the following elements:

- ☐ Navigation bar
- ☐ Resources tree
- ☐ Actions bar
- ☐ Content area

Navigation Bar

The navigation bar is located beneath the banner and above the WebFOCUS Explorer area. You can use the navigation bar to move between folders in your repository, search the contents of a domain or folder, change the view of items in the content area, and refresh content in a domain or folder you select.

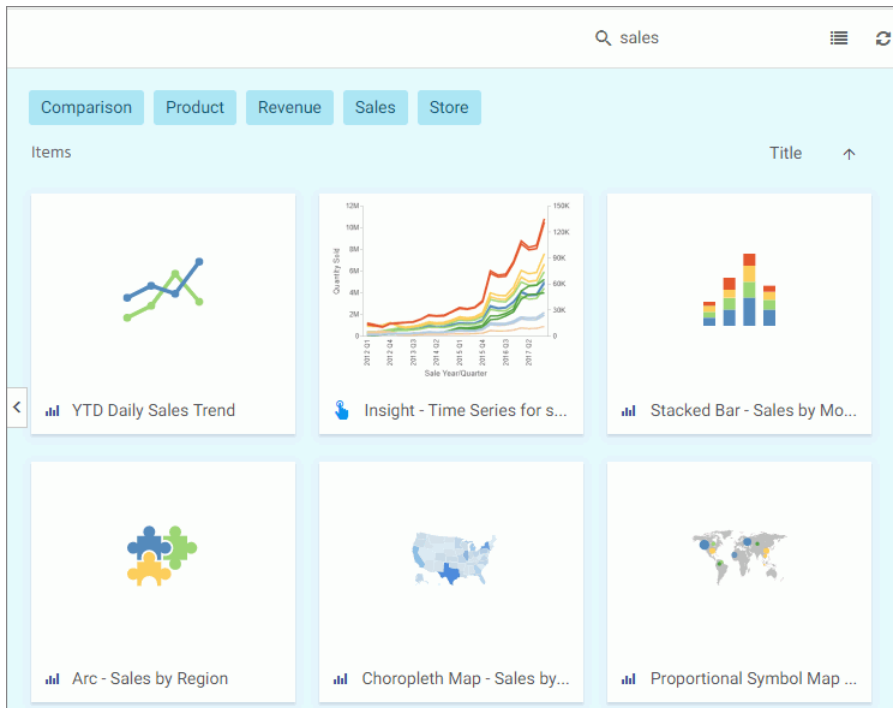
When you drill down into folders in your repository, the navigation bar generates a breadcrumb trail that you can use to move between folders. You can move back one folder or multiple folders in a single click. You can click a folder name to view the contents of that folder. You can also click arrows between the folders, to see the file structure that is currently displayed, as shown in the following image. The selected folder appears in bold text.





From the navigation bar, you can also search for items in your repository. To search for an item, type a key word in the Search field and press Enter. The results of your search display in the content area.

Note: Until you enter text, the Search field contains the name of the domain or folder as placeholder text. When you enter text into the Search field, an X appears. Click the X to clear the Search field. The X does not appear if you use a Firefox browser.

If the items in your results contain tags, these tags display with your search results. An example of user-defined tags in a search is shown in the following image.


















You also can toggle the view of your content between Grid View and List View and refresh all content in a domain or folder. By default, content displays in Grid View. Click the Grid view icon  or List view icon  to change your view.


Grid View allows you to see the thumbnails of your items, which you can customize to add transparency to your display. When you hover over a thumbnail image in Grid view that contains a summary, the image fades and the summary displays.


Note: When using an Internet Explorer 11 browser, the private status of an item is not indicated by the state of its icon in Grid view or font in the Resources tree. However, Internet Explorer 11 users can see a dashed line around icons for private items in Grid view, and a checkmark for published items in List view.

The List View is useful when you need to see a large number of items at a glance. You can sort your items by various criteria. An example of a List View is shown in the following image.


Title	Last Modified	Created On	Owner	
 Auto Link Targets	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Quarterly Analytics	8/28/2017 4:46:12 PM	8/28/2017 4:46:12 PM	admin	
 Slaes Dashboards	8/28/2017 4:45:14 PM	8/28/2017 4:44:31 PM	admin	
 Arc - Sales by Region	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Bar - Highest Margin Products	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 < Choropleth Map - Sales by State	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Heatmap - Average Margin Prod...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Line - Product Revenue By Mont...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Pie Matrix - Quantity By Region	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Proportional Symbol Map - Sale...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Scatter - Profit vs COGs for Prod...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Scatter - Profit vs COGs for Prod...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Scatter Matrix - Profit vs Cogs	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	
 Stacked Bar - Sales by Month an...	8/28/2017 4:44:11 PM	8/28/2017 4:44:11 PM	admin	


You can sort the list by clicking any column title. Each column features a three-step toggle sorting: ascending, descending, and back to default. You can also specify which columns display in the content area by clicking the Settings button, and selecting the desired columns from the list. An example of an expanded settings menu is shown in the following image.

Published


 Title

Name


 Summary


 Last modified


Created on

 Size

Owner

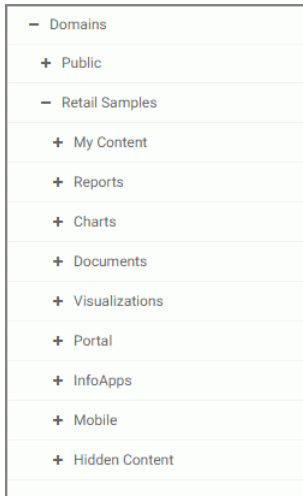
 Published

 Shown

To refresh all content in a selected domain or folder, click Refresh .

Resources Tree

The Resources tree provides a way to view your repository structure and navigate between domains and folders that are available to you. The following image shows an example of a Resources tree.

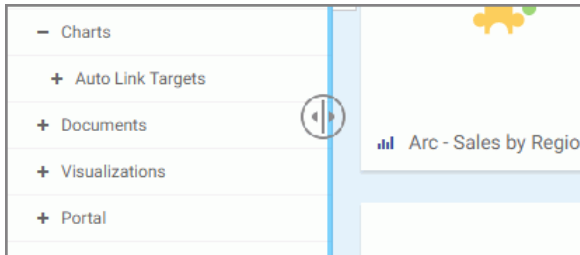


You can expand or collapse folders by clicking the plus (+) or minus (-) sign . When you click a folder, its contents display in the content area. You can also right-click a folder to access a shortcut menu of available options. From the shortcut menu, you can perform the following actions:

- ☐ Expand or Collapse a folder
- ☐ Duplicate a folder
- ☐ Cut or Copy a folder
- ☐ Paste content or another folder inside a folder
- ☐ Delete a folder
- ☐ Allow or suppress access to a folder
- ☐ Show or hide a folder
- ☐ Configure security rules for a folder

☐ View and edit properties for a folder

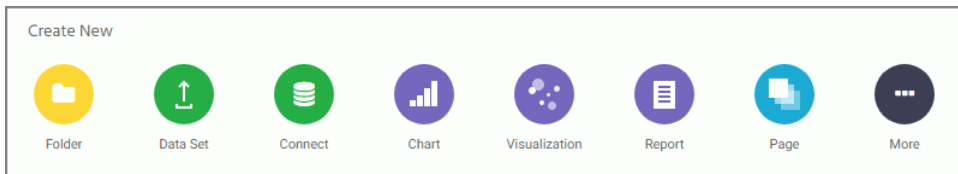
You can customize the width of the Resources tree. To do so, put your cursor on top of the right edge of the Resources tree area, as shown in the following image, and drag the edge to achieve the desired width. Your new width is remembered, and displays the next time you sign in to WebFOCUS.



You can also collapse the Resources tree to allow more room for the content area. To collapse the Resources tree, click the arrow on the left side of the tree. Click the arrow again to expand the Resources tree.

Actions Bar

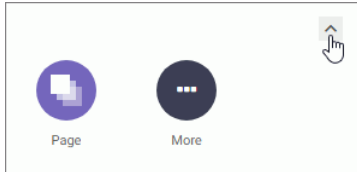
You can use the actions bar to create analytical content, upload files and spreadsheets, connect to data, build portals and pages, schedule procedures, and generate sample content using the options available to you for a domain or folder. The following image shows an example of the actions bar an advanced or basic user has access to for a domain or folder.



The default view of the actions bar displays the most common options available to you. You can access additional options by clicking *More*.

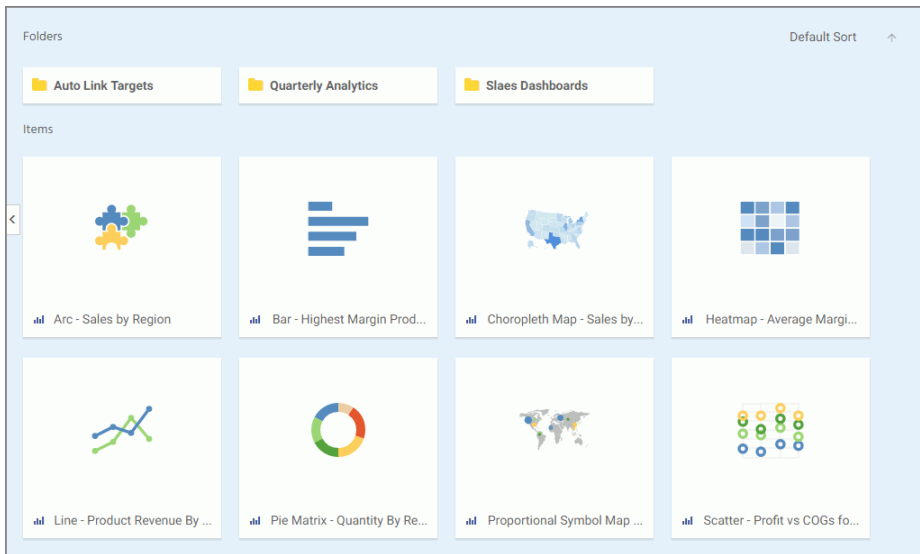
The actions bar only displays the items that you can create for the domain or folder that is currently selected. If you click the Domains node, the actions bar only displays the Domain and Folder options. The items displayed on the actions bar are also subject to permissions. You can only see the items that are available to you based on your role. To learn more about roles, see the *WebFOCUS Security and Administration* technical content.

Similar to the Resources tree, you can collapse the actions bar to make more room for the content area. To collapse the actions bar, click the arrow in the upper-right corner of the actions bar, as shown in the following image.



Content Area

The content area displays the items contained within a domain or folder that is currently selected. An example of a content area is shown in the following image.



If a resource contains folders and items, the folders are always displayed first, followed by the items. Items shown in the content area include reports, charts, pages, portals, and more.

You can sort your content by using the two sorting menus in the upper-left corner of the Content Area. One allows you to sort by various criteria, such as title, summary, size, last modified and published dates. The other menu toggles between the descending and an ascending orders. You can also create a customized sorting order, by configuring the Sort Order property for the item. If the sort order is configured, the Default Sort option is added to the menu.

You can right-click any folder or item to access a shortcut menu of options. The following options are available when you right-click a folder or item in the content area.

Expand/Collapse

Expands or collapses a folder. This option is only available for folders.

Run

Runs the report procedure or schedule.

Run in new window

Runs the selected item in a new browser window or tab.

Run deferred

Submits a report procedure or a schedule for deferred execution.

Run with SQL trace

Runs a report and includes an SQL trace of the report results.

Note: The Run with SQL Trace option is not available for visualizations.

Schedule

Launches the scheduling tool, where you can schedule a report procedure to be run.

Scheduling options include Email, FTP, Printer, Report Library, and Repository.

View log

Launches the Schedule Log Options dialog box, where you can select whether to view the most recent log report for the schedule, or specify a time range for which to obtain log reports. This option is only available for schedules.

View

Enables you to launch the URL or download a copy of the file to your browser. This option is available for URLs, Excel Workbooks, PDF, HTML, and Image Files.

Edit

Edits an item with the tool that was used to create it.

Edit with text editor

Edits an item in the Text Editor.

Create shortcut

Creates a shortcut to this item.

Duplicate

Makes a copy of the folder or item with an underscore and number appended to the title, for example, duplicating Sales_Report creates Sales_Report_1 in the same location. The number is incremented each time a duplicate is created.

Cut, Copy, and Paste

Cuts, copies, or pastes the folder and its contents or item.

Delete

Deletes the folder and its contents or item.

Publish/Unpublish

Allows or suppresses public access to the content.

Show/Hide

Shows or hides the folder or item.

Share/Unshare

Shares content with all users that are permitted to access this content. Unshare stops sharing content with all users.

Security

Provides access to the following options:

Rules

Opens the rules defined for the folder or item. Here you can modify the rules for a given item.

Rules on this resource

Shows the security rules for the folder or item.

Effective policy

Shows the defined rules that specify the permitted functionality on the folder or item.

Owner

Allows you to set the resource owner, either Published (no specific owner), or a specific group or user.

Customizations

Provides access to the following options:

Remove my customizations

Removes your own customizations from a portal and its pages.

Remove customizations for all users

Removes all user customizations and custom pages created at run time.

Note: These options are only available for portals and portal pages.

Manage alias

Opens the Manage Alias dialog box, where you can create an alias for the selected collaborative portal. This feature is only available to Administrators. This option is only available for portals.

Open item location

Redirects to the folder where the item is located. This option is only available for portals in the Portals view.

Comments

Provides access to the following options:

View comments

Opens the blog item and expands all comments.

Remove all comments

Clears all comments from the blog.

Note: These options are only available for blogs.

Unlink

Removes the page from all portals. This option is only available for portal pages.

Add to Favorites

Adds the item to the Favorites folder.

Add to Mobile Favorites

Adds the item to the Mobile Favorites folder.

Remove favorite

Removes the Favorite from the list. This option is only available for Favorites.

Remove mobile favorite

Removes the Mobile Favorite from the list. This option is only available for Mobile Favorites.

Properties

Opens the Properties panel to display the properties of the folder or item..

Folder and Item Properties

Authorized users can select the Properties option to review information about a folder or item, including when it was created, the date it was last modified, title, name, and settings that control the Reporting Server and applications it will access. There are also settings that control the functionality available to users when they access the folder, run, or schedule an item.


The following image shows the Properties panel for a stacked bar chart.

The screenshot shows a 'Properties' dialog box for a chart. The title bar reads 'Stacked Bar - Units Sold by Stores vs Web (Animation)'. There are four tabs: 'General' (selected), 'Advanced', 'Query Detail', and 'Server'. The 'General' tab contains the following fields:

- Title:** Stacked Bar - Units Sold by Stores vs Web (Animation)
- Name:** Units_Sold_by_Stores_vs_Web_Over_time.fex (with an edit icon)
- Summary:** (empty text area)
- Path:** IBFS:/WFC/Repository/Retail_Samples/Charts/Units_Sol...
- Created:** Thursday, March 29, 2018 10:02:24 PM EDT by admin
- Modified:** Thursday, March 29, 2018 10:02:24 PM EDT by admin
- Accessed:** Thursday, March 29, 2018 10:02:24 PM EDT by admin
- Tool:** chart
- Owner:** -
- Size:** 21 KB
- Publish:** ☒ Yes ☐ No
- Show:** ☒ Yes ☐ No

At the bottom are 'Save' and 'Cancel' buttons.

The General Properties tab includes the following settings:

- ☐ **Title.** Displays the value that you can use to identify the content in the Resources tree.
- ☐ **Name.** Refers to the unique name of the item or folder. Click the *Edit* button  to change the name.
- ☐ **Summary.** Detailed explanation that provides additional information about the item.
- ☐ **Path.** Full path of the folder or item in the WebFOCUS repository.
- ☐ **Created.** Shows the date the folder or item was created.
- ☐ **Modified.** Shows the date the folder or item properties were last modified, and identifies the user that modified them.
- ☐ **Accessed** Shows the date the folder or item was last opened, and identifies the user that opened it.

- ☐ **Tool.** Specifies the type of an item.
- ☐ **Owner.** Identifies the user who created the folder or item.
- ☐ **Size.** Displays N/A bytes for folders. For items, displays the size in bytes.
- ☐ **Publish.** Provides an option to publish or unpublish the folder or item.
- ☐ **Show.** Provides an option to show or hide the folder or item.

The Advanced tab, which is shown in the following image, allows you to customize the functionality and behavior of the folder or item.

Stacked Bar - Units Sold by Stores vs Web (Animation) X

General **Advanced** Query Detail Server

Explorer/Portal Properties

Thumbnail ☒ Default ☐ Embedded ☐ Link

Sort order

Language English

Load in iframe ☒ Yes ☐ No

Default width Pixels

Default height Pixels

Search Properties

Tags

Interactive Reporting Properties

☒ Prompt for parameters

☐ Enable AutoLinking

☐ AutoLink target

☐ Enable AutoDrill

☐ Run with OLAP

☐ Use title for deferred report description

☐ Schedule only

☐ Only run as deferred report

☐ Only allow user to run

☐ Allow user to run

Scheduling and Library Content Properties

☐ Restrict schedule to Library only

The Advanced Properties tab includes the following properties.

Explorer/Portal Properties:

- ☐ **Thumbnail.** Allows you to preview and change the thumbnail for an item.
- ☐ **Sort order.** Specifies the order to list the folder in the tree or item within other items in a folder.
- ☐ **Language.** Indicates the current language of your environment.
- ☐ **View All.** Opens the Language Properties dialog box, where you can select a language.
- ☐ **Load in iframe.** Grants or suppresses a permission to load an item in an iFrame container.
- ☐ **Default width.** Sets a default width value for the item, when it is displayed inside a portal at run time.
- ☐ **Default height.** Sets a default height value for the item, when it is displayed inside a portal at run time.

Search Properties:

- ☐ **Tags.** Adds tag values to the item that display in the search results and portal lists.

Interactive Reporting Properties:

- ☐ **Prompt for parameters.** Indicates whether to display the Autoprompt HTML page to allow the user to view and select parameter values. When this check box is clear, users will still be prompted if there are any parameters that do not have a value supplied.
- ☐ **Enable AutoLinking.** Establishes drill-down links from column data to the target reports that you link together.
- ☐ **AutoLink target.** Identifies a report as the target report that is run when the drill-down link is triggered.

Note: The Auto Linking between reports only works if it the target report contains a parameterized field that corresponds to one of the fields in the primary Auto Link report. For more information on Auto Linking, see the *WebFOCUS InfoAssist User's Manual*.

- ☐ **Enable AutoDrill.** Creates drill-down links in reports and charts that contain hierarchical data.
- ☐ **Run with OLAP.** OLAP-enables the report.

- ☐ **Use title for deferred report description.** Indicates whether or not to prompt for a custom deferred report description. If selected, this option gives you an alternative to being prompted for a custom deferred report description. If you want to disable prompting for custom deferred report descriptions for all reports, see the Custom Deferred Report Description setting content in the *WebFOCUS Security and Administration* technical content.
- ☐ **Schedule only.** Indicates that the report can only be scheduled using ReportCaster when the user does not have write access. This option is not available for reporting objects.
- ☐ **Only run as deferred report.** Runs the report in deferred mode.
- ☐ **Only allow user to run.** Specifies to not allow users to use InfoAssist with a reporting object. Depending on the effective policy, users can only use the Run or Run Deferred options.
- ☐ **Allow user to run.** Allows a user not permitted to access the Reporting Object tool to run the reporting object interactively, using the Run or Run Deferred options.

Scheduling and Library Content Properties:

- ☐ **Restrict schedule to Library only.** Prevents emails distribution for security-sensitive scheduled reports, and restricts them to the library distribution only.

The Query Detail Properties tab, which is shown in the following image, is only available for reports, charts, and visualizations. It shows which data elements, parameters, and conditions were used in an item.

Stacked Bar - Units Sold by Stores vs Web (Animation) ✕

General
Advanced
Query Detail
Server

Master Files
 RETAIL_SAMPLES/WF_RETAIL_LITE

Data Elements
 WF_RETAIL_LITE.WF_RETAIL_SALES.QUANTITY_SOLD

Sorts
 WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR; sortOrder=LOWEST
 WF_RETAIL_LITE.WF_RETAIL_STORE_SALES.STORE_TYPE; sortOrder=LOWEST
 WF_RETAIL_LITE.WF_RETAIL_PRODUCT.PRODUCT_CATEGORY; sortOrder=LOWE...
 WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_MTH; sortOrder=LOWEST

Conditions
 WHERE WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR GE 2012

Expressions

Output Formats
 JSCHART

Joins

Save
Cancel

The Server Properties tab, which is shown in the following image, allows you to manage the server and application path settings.

Choropleth Map - Sales by State

General

Advanced

Query Detail

Server

☐ Assign Server

☐ 123456789012...

☐ BW-SAP

☐ C9-77x

☐ DT82

☐ ESSBASE

☐ HYP_XFOC

☐ MSSQLAS

☐ MVS-IMS

☐ TER1_77x

☐ TERAODBC

☐ 7705MSRV

☐ BW-SAP2

☐ DB2-97

☐ EDAARH

☐ ESSBASE2

☐ JIRARPTS

☐ MVS-DB2

☐ PDS15123

☐ TER2_77x

☐ USS15327

☐ BIGSCM14

☐ C9

☐ DB2-97-2

☒ EDASERVE

☐ GREENPLM

☐ M7706SRV

☐ MVS-EDA

☐ QAWSYSINT04

☐ TERACLI

☐ XFOCUS

☒ Assign Application Path

☒ retail_samples

☐ active_validation

☐ assets

☐ bank

☐ baseapp

Save

Cancel

To change the server, select the *Assign Server* check box, and then select a server from the list. You can also change the application path in the same way.

By default, the Properties panel remains open while you browse between folders and items, allowing you to configure several resources quickly without closing the panel. To close the Properties panel, click the *Close* button in the upper-right corner of the panel.

Configuring Your WebFOCUS Environment

From the WebFOCUS Home Page, you can create new domains or folders to organize content in your organization. You can also configure the preferences of your environment, add thumbnails to view content easily, and add content to the Favorites or Mobile Favorites views.

This topic provides information about how you can create domains, configure folders and preferences, in your WebFOCUS environment.

In this chapter:

- ☐ [Creating New Domains and Folders](#)
 - ☐ [Configuring Preferences](#)
 - ☐ [Adding Content to Favorites](#)
 - ☐ [Adding Thumbnails to Content Items](#)
 - ☐ [Assigning Tags to Content Items](#)
 - ☐ [Viewing the Home Page on Mobile Devices](#)
-

Creating New Domains and Folders

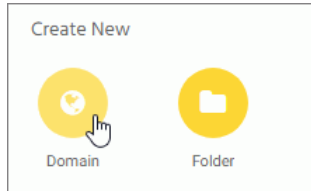
Your Home Page is the central location for all WebFOCUS tasks. Setting it up in a way that is convenient, secure, and efficient helps you get the most out of your work. The default view of the Home Page opens the content area, and provides access to the available domains. Domains and folders that are located in the Resources tree organize all of your content items. Authorized users can create additional domains or folders, as well as customize the default structure of their view.

Note: The full view of the resources, in which the servers are listed as folders, is only available from the Legacy Home Page. To access the full view, on the Legacy Home Page, right-click *Domains*, point to *View*, and then click *Full View*.

Procedure: How to Create a Domain

1. In the Resources tree, click *Domains*.

2. On the actions bar, click *Domain*, as shown in the following image.



The New Domain dialog box opens.

3. From the Type drop-down list, click the type of a domain you want to create.

The options include:

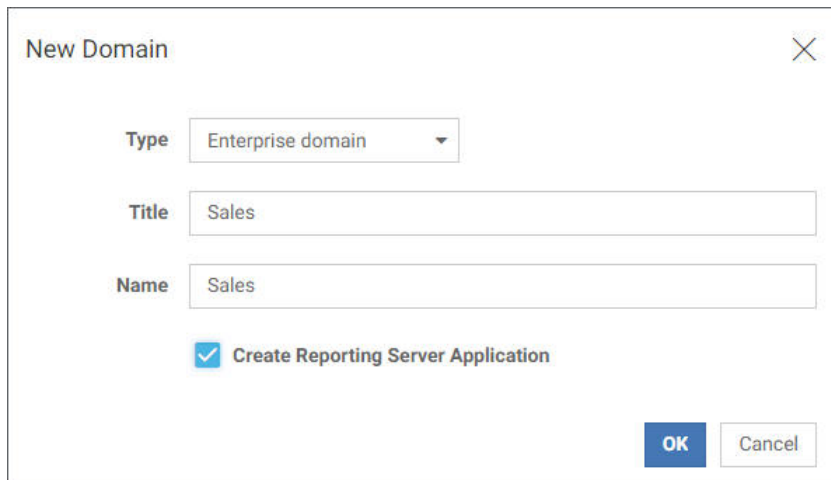
- ☐ **Enterprise domain.** Supports installations of WebFOCUS that affect a single enterprise and are organized by department, and content, within that enterprise.
- ☐ **Tenant domain.** Supports installations of WebFOCUS that affect multiple enterprises, and are organized by the tenant clients of a software as a service vendor.

4. Type a Title for your domain.

The Name field populates with the same text as the Title, automatically. You can edit the Name at any time.

5. Select the *Create Reporting Server Application* check box if you want to add an application folder to the Reporting Server for your new domain.

An example of a new Sales Enterprise Domain is shown in the following image.

A screenshot of the 'New Domain' dialog box. It has a title bar with 'New Domain' and a close button (X). The dialog contains three input fields: 'Type' is a dropdown menu with 'Enterprise domain' selected; 'Title' is a text box containing 'Sales'; 'Name' is a text box containing 'Sales'. Below these fields is a checked checkbox labeled 'Create Reporting Server Application'. At the bottom right are 'OK' and 'Cancel' buttons.

6. Click *Create*.

The content area refreshes, and your new domain now appears in the Resources tree. Expand the new domain in the Resources tree to view the My Content and Hidden Content folders. These folders are automatically created with the new domain.

- ❑ **My Content.** Stores all of your personal folders and content. You can share these items to make them available to other users. To share a resource, right-click the item and then click *Share*.

Note: Shared resources appear in a Shared Content folder for users with which you shared the resources.

- ❑ **Hidden Content.** Store all of your current procedures, utility items, and other resources that you do not want to show to other users.

Additionally, by default, four new user groups are automatically created in the Security Center. Those users include Basic Users, Advanced Users, Developers, and Group Administrators. By assigning users to these groups, you can quickly grant privileges according to these predefined roles. Sales domain users that were created in the Security Center are shown in the following image.

[-] Sales	Sales
+ BasicUsers	Sales Basic Users
+ AdvancedUsers	Sales Advanced Users
+ Developers	Sales Developers
+ GroupAdmins	Sales Group Administrators

For more information about domains and users, see the *WebFOCUS Security and Administration* technical content.

Procedure: How to Create a Folder

1. In the Resources tree, select the domain where you want to create a folder.
2. On the actions bar, click *Folder*.

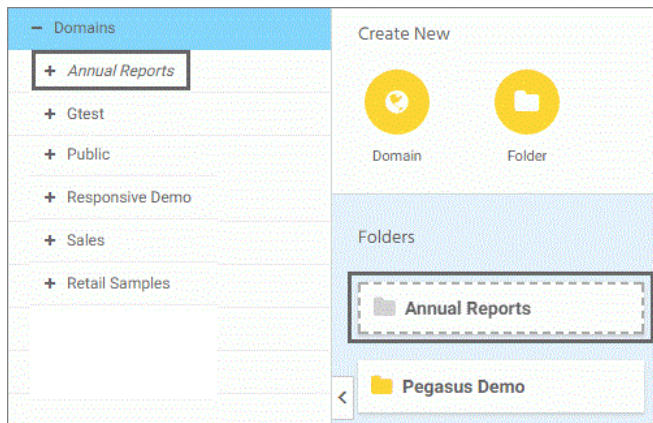
The New Folder dialog box opens.

3. Type a Title for your folder.

The Name field populates with the same text, automatically. You can edit the Name at any time.

4. Click *Create*.

The new folder is created and is now available in the Resources tree. Unlike a new domain, a new folder is not published by default, so when it first appears in the Resources tree, it appears with grayed-out icon and dotted border. Additionally, the title shown in the Resources tree is italicized. An example of a new folder is shown in the following image.

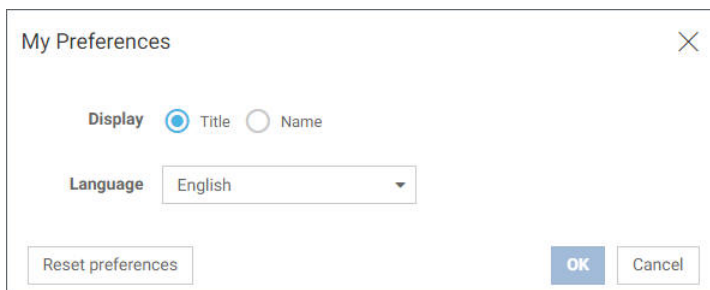


To publish a new folder, right-click it, and then click *Publish*. By default, when you publish a folder, you automatically publish all its contents as well.

Configuring Preferences

By default, your WebFOCUS environment shows repository content items by Title and uses the English language. You can modify these preferences or reset them back to the default by using the My Preferences dialog box.

To change the preferences of your environment, from the User menu, click *Preferences*. The My Preferences dialog box opens, as shown in the following window.



In this dialog box, you can make the following changes:

- ☐ Click *Name* to display content items in the repository by Name, instead of by Title.

- ☐ Click the Language menu, and then click the language that you want the WebFOCUS environment to use.
- ☐ Click *Reset preferences* to return to the default preferences of the WebFOCUS environment. This includes any preferences that you set for viewing the sidebar, folder selection in the Resources tree, and WebFOCUS explorer grid or list view.

To save your changes, click *OK*. When you return to the Home Page, your preferences are applied.

Adding Content to Favorites

You can customize the view of content on your Home Page using the Favorites or Mobile Favorites features. When you save content as a favorite, it automatically appears in the Favorites view. Here, you can interact with your content, view its properties, and add it to Mobile Favorites, to make it available on portable devices.

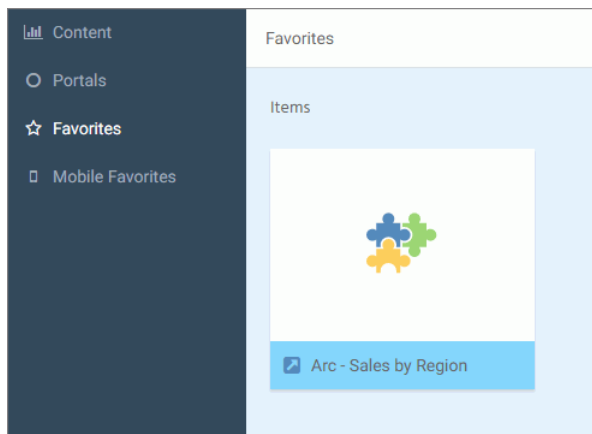
Procedure: How to Add Content to Favorites

1. In the WebFOCUS Explorer, right-click an item, and then click *Add to Favorites*.

Note: Standalone portal pages cannot be added as favorites. You can add them to collaborative portals, and then add collaborative portals as favorites.

2. On the sidebar, click *Favorites*.

The item now appears in the Favorites view, as shown in the following image.



If you right-click the item, a shortcut menu of options opens. Here, you can do the following:

- ☐ Click *Run* or select a different way to run the item by pointing to *Run....*

- ☐ Point to *Schedule*, and choose a scheduling option for the item.
- ☐ Click *Edit* or *Edit with text editor* to edit the item in the appropriate tool or text editor.
- ☐ Click *Remove favorite* to remove the item from the Favorites view.
- ☐ Click *Add to Mobile Favorites* to add it to the Mobile Favorites view.
- ☐ Click *Properties* to open the Properties panel, and edit the properties of the item.

Procedure: How to Add Content to Mobile Favorites

1. In the WebFOCUS explorer, right-click an item, and then click *Add to Mobile Favorites*

Note: Standalone portal pages cannot be added as mobile favorites. You can add them to collaborative portals, and then add collaborative portals as mobile favorites.

2. On the sidebar, click *Mobile Favorites*.

The item now appears in the Mobile Favorites view.

If you right-click the item, a shortcut menu of options opens. Here, you can do the following:

- ☐ Click *Run* or select a different way to run the item by clicking, *Run...*
- ☐ Click *Schedule*, and choose a scheduling option for the item.
- ☐ Click *Edit* or *Edit with text editor* to edit the item in the appropriate tool or text editor.
- ☐ Click *Remove mobile favorite* to remove the item from the Favorites view.
- ☐ Click *Properties* to open the Properties panel, and edit the properties of the item.

Adding Thumbnails to Content Items

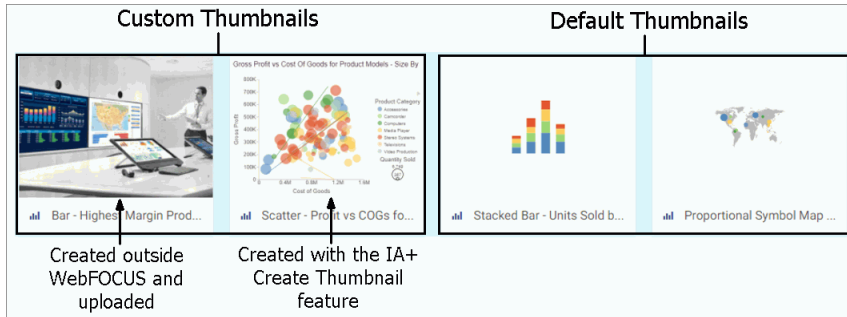
To provide additional context to your items and simplify navigation, you can add custom thumbnails to your content items. These thumbnails might be created from any image files on your machine. You can also create thumbnails from the image files that can be found in your repository.

There are two types of thumbnails in the Home Page:

- ☐ **Default.** Assigned to an item by WebFOCUS in the absence of a custom thumbnail.
- ☐ **Custom.** Created either from an uploaded image or with the InfoAssist Create Thumbnail feature.

Note: To learn more about creating thumbnails in InfoAssist, see the *WebFOCUS InfoAssist User's Manual*.

Examples of custom and default thumbnails are shown in the following image.



Thumbnails are only visible in the grid view.

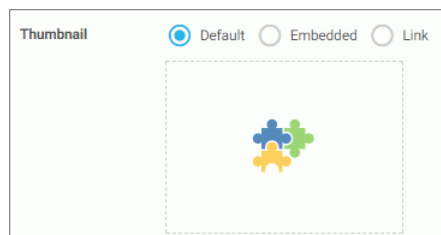
Procedure: How to Add Thumbnails to Content

1. In the WebFOCUS Explorer, right-click a content item to which you want to add a thumbnail, and then click *Properties*.

The Properties panel opens.

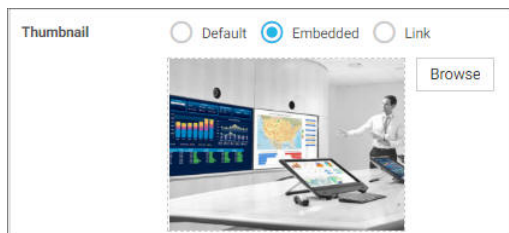
2. Click the *Advanced* tab.
3. In the Thumbnail property, choose one of the following options:

- ☐ **Default.** Populates the thumbnail with the default graphic, as shown in the following image. This is a default option.



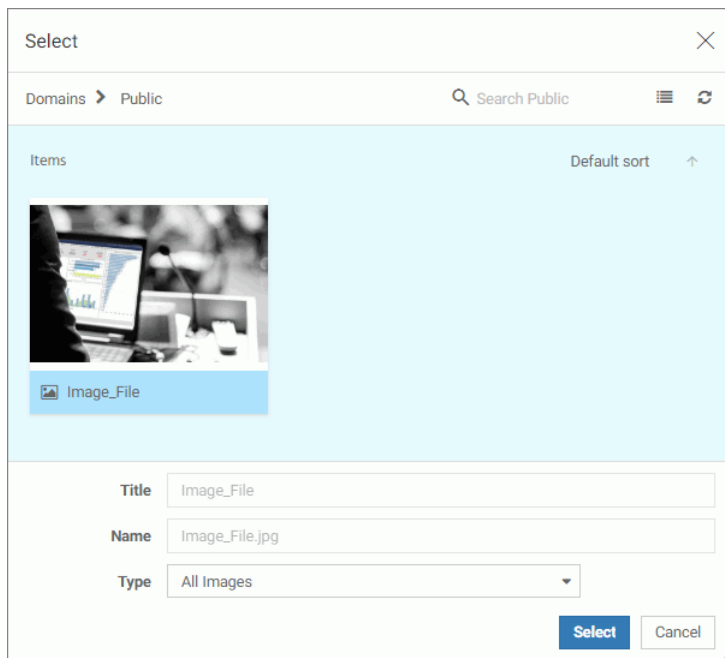
- ☐ **Embedded.** Enables you to choose a custom image from your machine.

In the Open dialog box, select an image file and click *Open*. The custom image displays in the preview section of the Thumbnail property, as shown in the following image.



To change an image, click *Browse* and select another image file.

- ❑ **Link.** Opens the Select dialog box, where you can navigate to any available image file in your repository, as shown in the following image.



To change an image, click *Browse* and select another image file in your repository.

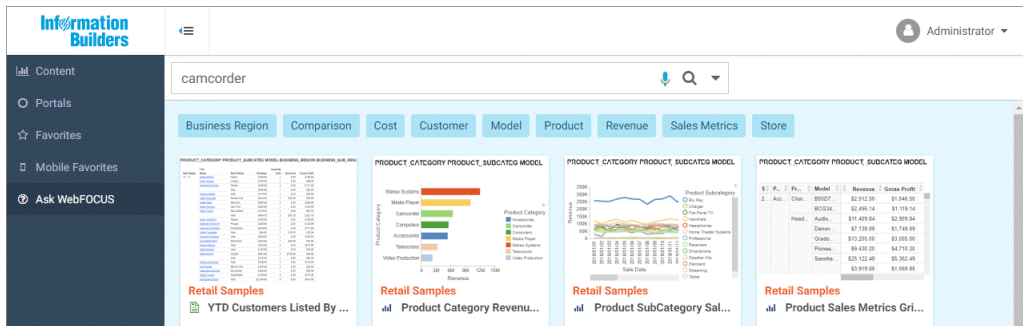
4. Once the thumbnail is selected, click *Save* in the Properties panel.

The thumbnail displays in the WebFOCUS Explorer.

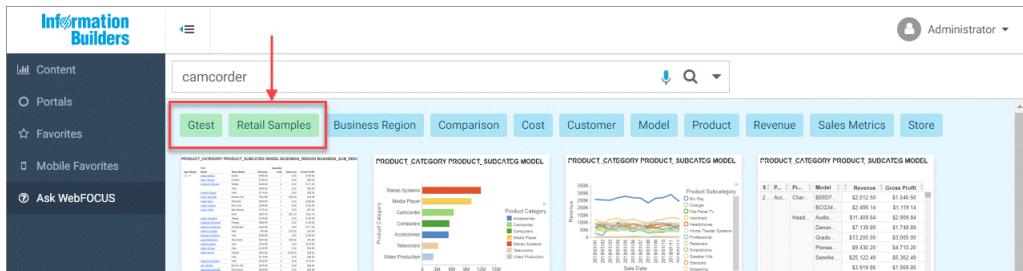
Assigning Tags to Content Items

To refine a search for content within a domain or folder in your repository or in the Ask WebFOCUS view, you can assign tags that appear with your search results. These tags provide additional search criteria that you can use to drill down and identify related content items quickly. You can also assign tags to collaborative portals to ease navigation in the Portals view. Tags are turned off by default. To select a tag, click it. Tags are only available in the grid view.

When you use tags in the Portals or Ask WebFOCUS views, where searches may bring results from different domains, the domains may be listed in two ways. When all your results come from a single domain, only the blue tags display, and the domain name appears in orange text inside the thumbnail, as shown in the following image.



If content is found in two or more domains, then green domain-specific tags display, allowing the user to filter the content by domain, as shown following image.



Note: Green domain-specific tags only display if two or more domains are present in a search or list. A single domain-specific tag is never displayed. Unlike a single blue content-specific tag, which filters results to that value, a single green tag would not alter the display of search results.

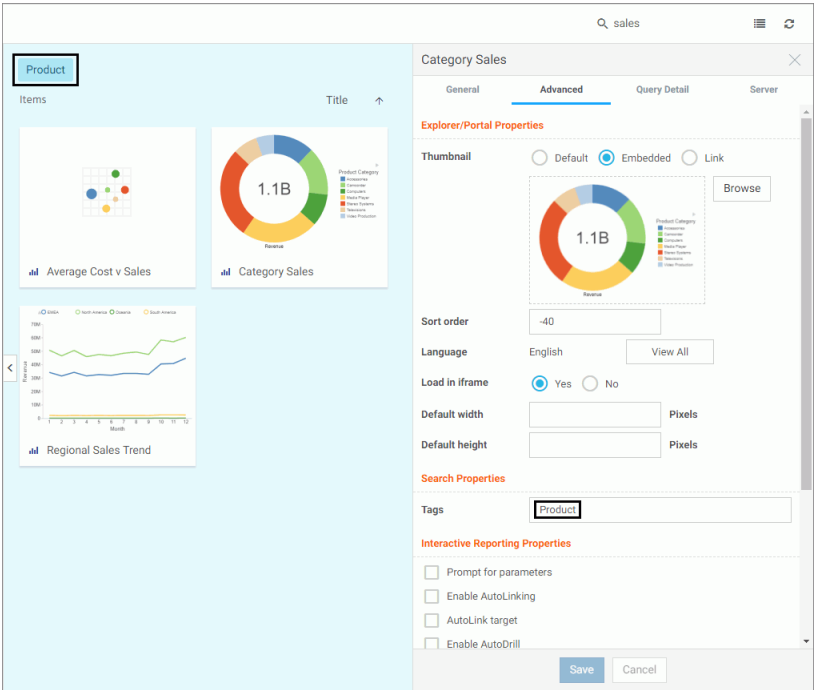
Procedure: How to Assign Tags to Content

- 1. In the WebFOCUS Explorer, right-click a content item that you want to assign to a tag, and then click *Properties*.

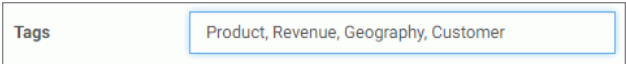
The Properties panel opens.

- 2. Click the *Advanced* tab.
- 3. In the Tags field, type the name of your tag, and then click *Save*.

To test the tag you assigned to the item, perform a search. The tag and item should appear in the search results. An example of a Product tag is shown in the following image.

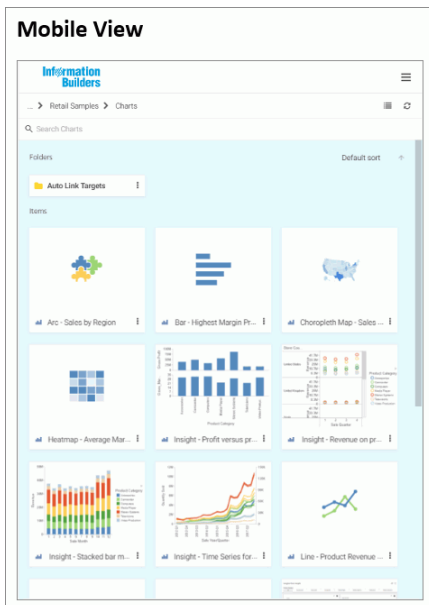
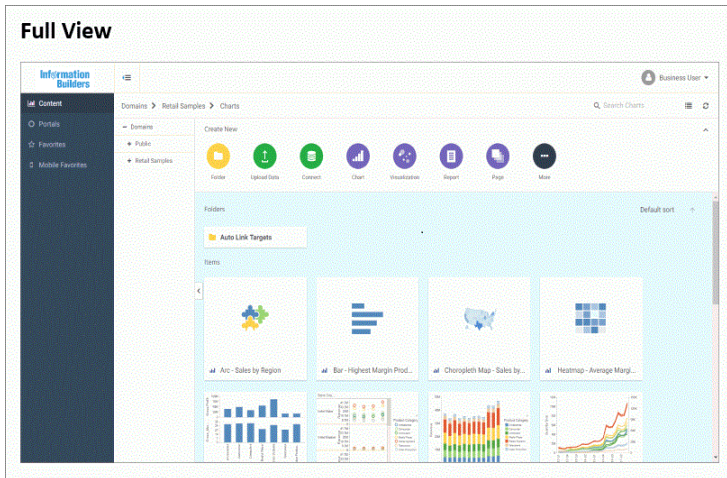



You can assign multiple tags to a single item, by separating them with a comma, as shown in the following image.

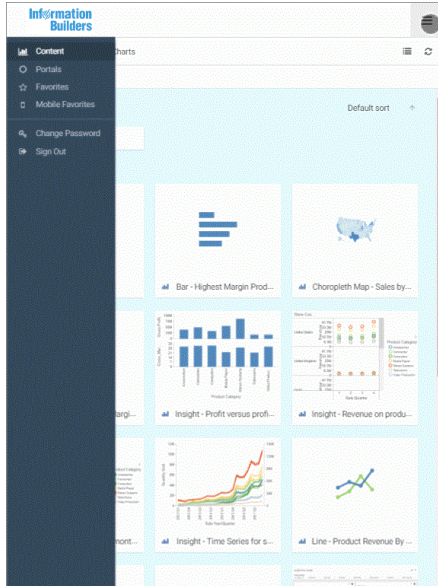


Viewing the Home Page on Mobile Devices


The WebFOCUS Home Page is optimized for viewing on mobile devices. It automatically adjusts to a smaller screen or browser width. Additionally, there are several interface and functionality changes that occur when you switch from the full view to the mobile view. The following images show the difference between the full view of the Home Page and its version on a mobile device-sized screen.

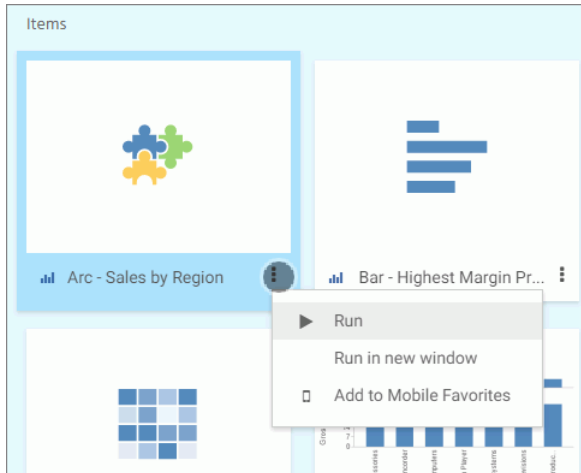


When you view the Home Page on a mobile device, the sidebar is hidden from view to allow more space for your content. You can bring the sidebar back by tapping the menu button  on the navigation bar, as shown in the following image.



The actions bar and the drop-down button on the navigation bar are also hidden in the mobile view. To access the functionality available from these features, you need to use the full desktop version of the software. The Change Password and Sign Out options display on the bottom of the sidebar in the mobile view.

You can run content in the mobile view by tapping on an item. Select shortcut menu options are also available on mobile devices. To access the shortcut menu options, tap the ellipsis button  in the bottom-right corner of the item, as shown in the following image. The shortcut menu options are context sensitive, and vary, depending on the item or element you want to access.



To navigate between domains and folders on a mobile device, you must use the breadcrumb trail. The arrows between the directories allow you to switch between different folders. Click the ellipsis to navigate between the levels that are hidden from view.

You can also search, switch between list and grid views, refresh and sort content in the mobile view. These functions perform in the same way as they do in the full desktop view.

Working With Data Overview

There are two ways that you can connect to data in WebFOCUS. You can upload a Microsoft Excel spreadsheet or CSV file using the Upload wizard, or you can connect to an existing table in a data source of your choice, using the Connect to Data wizard. Both processes begin with identifying and preparing the data that you want to use. After your file or table selection is complete, the wizard shows you the default breakdown of your data as measures, dimensions, and hierarchies.

At similar points during the upload and connect processes, you can access options to transform your data beyond the default settings. This includes joining multiple tables into a cluster to create more fields and expand the scope of a synonym, editing geo roles and geo encoding to prepare the synonym for use in mapping and location analysis, data profiling and statistical analysis, changing columns or groups of columns into rows, and creating new or editing existing field roles.

Once a synonym is complete, you can upload it to a target environment or append it or merge it with an existing synonym. You can also save it as a template to allow repeated transformations if the same file is uploaded again in the future.

In this chapter:

- ☐ [Understanding Your Data Structures](#)
-

Understanding Your Data Structures

When you upload or connect to data in WebFOCUS, you create a synonym that can be used to build analytical content. Synonyms define unique names (or aliases) for each object that is accessible from the Reporting Server. Synonyms are useful because they hide the underlying data source location and identity from client applications. They also provide support for extended metadata features of the Reporting Server, such as virtual fields and additional security mechanisms.

Depending on the structure of the synonym that you are creating, the data inside a synonym is typically broken down into categorized roles, such as measures (facts), dimensions, hierarchy levels, and attributes.

A measure or fact is a numeric value, such as Gross Profit or Cost of Goods Sold, that you can aggregate. Numeric fields that cannot be summed, such as product number or order ID, are not categorized as measures. Instead, they may be used in the same way as dimension fields to analyze measures.

A dimension is a way to categorize data or sort output. You can use a dimension to analyze and compare measures. Usually, dimension fields are alphanumeric fields such as Product. Certain dimension fields can be organized into hierarchies to define the relationship between the fields. For example, a Geography hierarchy can contain the Region, Country, State, and City fields.

An attribute is a field or collection of fields that provide additional information about a dimension.

Using the Business View Plus (BV+), you can create a view of your data that represents its business use by creating virtual segments called folders and adding fields to these folders. You have the flexibility to create folders anywhere in the structure, as well as reusing fields in multiple folders. You can then categorize those folders and fields as measures, dimensions, hierarchy levels, or attributes.

Uploading Data Files in WebFOCUS

You can upload an Excel spreadsheet or a CSV file to your database using the Upload wizard in WebFOCUS. Because spreadsheets and CSV files may often come from different sources and feature different formats, it is beneficial to prepare your files and resolve all inconsistencies before you begin the upload procedure. This topic explains general data preparation principles, walks through the upload procedure, and shares techniques for how you can modify your data once the upload is complete.

In this chapter:

- ☐ [Preparing Data for Upload](#)
 - ☐ [Uploading, Appending, and Merging Spreadsheets](#)
 - ☐ [Pivoting Repeating Columns Into Rows](#)
 - ☐ [Creating Clusters](#)
 - ☐ [Creating Folders and Assigning DV Roles](#)
-

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

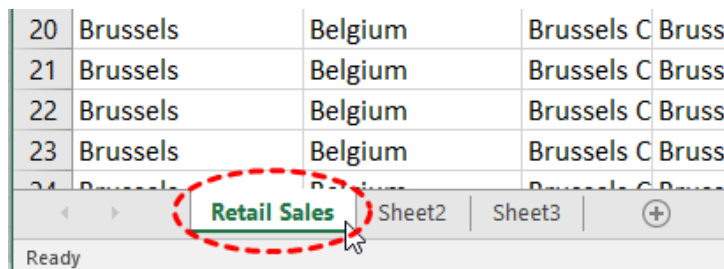
For Excel spreadsheets, the name of the file is not important but the name of the worksheet that contains your data is used to generate the synonym name. For the best results, follow the guidelines below:

- ☐ 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.



The image shows a screenshot of an Excel spreadsheet. The worksheet is named 'Retail Sales', which is highlighted with a red dashed circle. The spreadsheet contains data for rows 20 through 24. Each row has four columns: the first column contains row numbers (20-24), the second column contains 'Brussels', the third column contains 'Belgium', and the fourth column contains 'Brussels C Bruss'. The worksheet tabs at the bottom are 'Retail Sales', 'Sheet2', and 'Sheet3'.

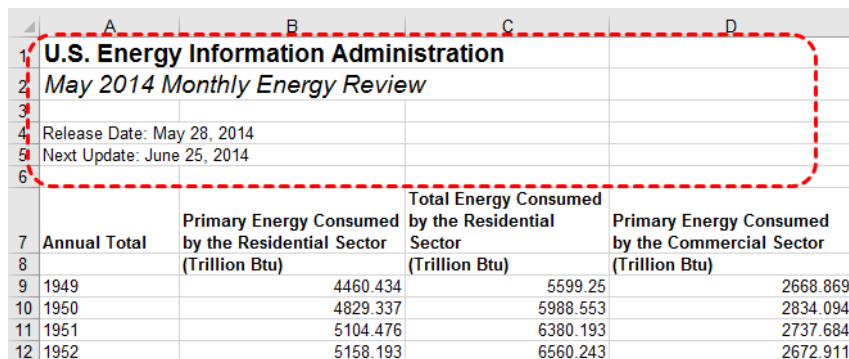
20	Brussels	Belgium	Brussels C Bruss
21	Brussels	Belgium	Brussels C Bruss
22	Brussels	Belgium	Brussels C Bruss
23	Brussels	Belgium	Brussels C Bruss
24	Brussels	Belgium	Brussels C Bruss

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.



The image shows a screenshot of an Excel spreadsheet. The first six rows are highlighted with a red dashed box, indicating introductory information. Row 1 contains 'U.S. Energy Information Administration', Row 2 contains 'May 2014 Monthly Energy Review', Row 3 is empty, Row 4 contains 'Release Date: May 28, 2014', Row 5 contains 'Next Update: June 25, 2014', and Row 6 is empty. The data starts in Row 7. The spreadsheet has four columns: 'Annual Total', 'Primary Energy Consumed by the Residential Sector (Trillion Btu)', 'Total Energy Consumed by the Residential Sector (Trillion Btu)', and 'Primary Energy Consumed by the Commercial Sector (Trillion Btu)'. The data rows (7-12) show energy consumption for the years 1949, 1950, 1951, and 1952.

	A	B	C	D
1	U.S. Energy Information Administration			
2	May 2014 Monthly Energy Review			
3				
4	Release Date: May 28, 2014			
5	Next Update: June 25, 2014			
6				
7	Annual Total	Primary Energy Consumed by the Residential Sector (Trillion Btu)	Total Energy Consumed by the Residential Sector (Trillion Btu)	Primary Energy Consumed by the Commercial Sector (Trillion Btu)
8				
9	1949	4460.434	5599.25	2668.869
10	1950	4829.337	5988.553	2834.094
11	1951	5104.476	6380.193	2737.684
12	1952	5158.193	6560.243	2672.911

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.

	A	B	C	D	E	F	G	H
1	Store Name	Country	State	City	Sale Date	Revenue	Cost of Goods	Gross Profit
2	Des Moines	United States	Iowa	Des Moines	9/5/2013	3487.45	2288	1199.45
3	Dayton	United States	Ohio	Dayton	9/1/2013	13371.56	9459	3912.56
4	South Salt Lake	United States	Utah	South Salt Lake	9/2/2013	5642.79	4049	1593.79
5	Oslo	Norway	Oslo	Oslo	10/2/2013	13094.04	9206	3888.04
6	Des Moines	United States	Iowa	Des Moines	10/5/2013	4821.17	2962	1859.17
7	Dayton	United States	Ohio	Dayton	10/2/2013	13094.04	9206	3888.04
8	South Salt Lake	United States	Utah	South Salt Lake	10/5/2013	5564.52	3853	1711.52
9	Oslo	Norway	Oslo	Oslo	11/13/2013	18957.63	13293	5664.63
10	Des Moines	United States	Iowa	Des Moines	11/6/2013	6092.9	4513	1579.9

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.

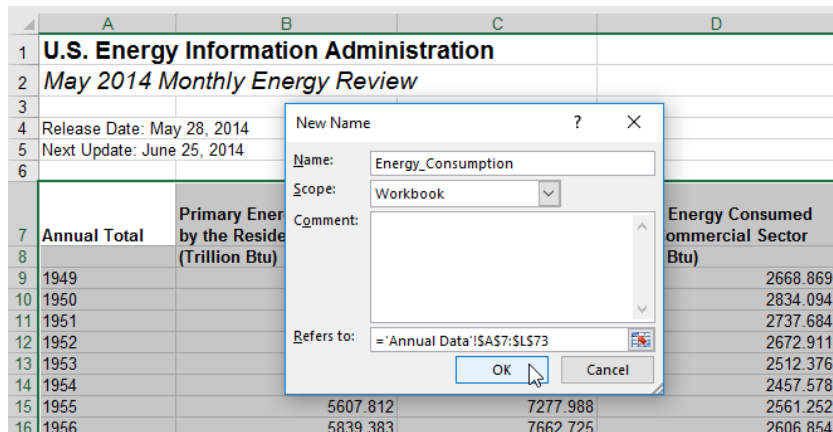
Using Excel Name Ranges

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.

Preparing Data for Upload

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

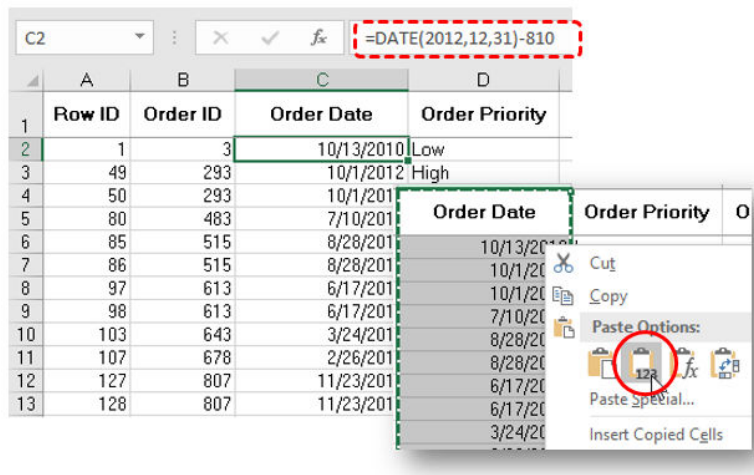
WebFOCUS recognizes columns of data that have hierarchical relationships. This is useful because the field names are arranged more logically in InfoAssist and because it facilitates Auto drill capabilities in the content. Auto-drill lets you drill up and down a field hierarchy automatically, making the 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.

	A	B	C	D	E	F	G
1	Store Name	Product Category	Product Subcategory	Sale Date	Revenue	Cost of Goods	Gross Profit
2	Des Moines	Video Production	Video Editing	9/5/2013	3487.45	2288	1199.45
3	Dayton	Video Production	Video Editing	9/1/2013	13371.56	9459	3912.56
4	Dayton	Video Production	Video Editing	12/1/2013	19097.49	13386	5711.49
5	South Salt Lake	Video Production	Video Editing	12/1/2013	10763.83	8138	2625.83
6	Brussels	Accessories	Universal Remote Controls	3/2/2010	10060.72	7822	2238.72
7	Brussels	Accessories	Universal Remote Controls	4/1/2010	12839.15	9456	3383.15
8	Brussels	Accessories	Universal Remote Controls	5/1/2010	9848.13	6992	2856.13
9	Brussels	Accessories	Universal Remote Controls	6/1/2010	10357.7	7584	2773.7
10	Brussels	Accessories	Universal Remote Controls	7/1/2010	10979.11	8283	2696.11

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 InfoAssist.



Uploading, Appending, and Merging Spreadsheets


You can upload, append, or merge Excel spreadsheets or CSV files using the Upload wizard. Before uploading a new file, you should review [Preparing Data for Upload](#) on page 45, to ensure that your upload runs successfully.

After you upload a new file, you can append a file by adding new data to an existing synonym, without changing the structure. This option is useful when you are working with a complex or heavily edited synonym, by allowing you to retain all previous edits and data transformations. You can also merge a file with your data and enhance the existing structure.

The procedures in this section provide step-by-step instructions for uploading, appending, and merging files using the default settings in the Upload wizard.

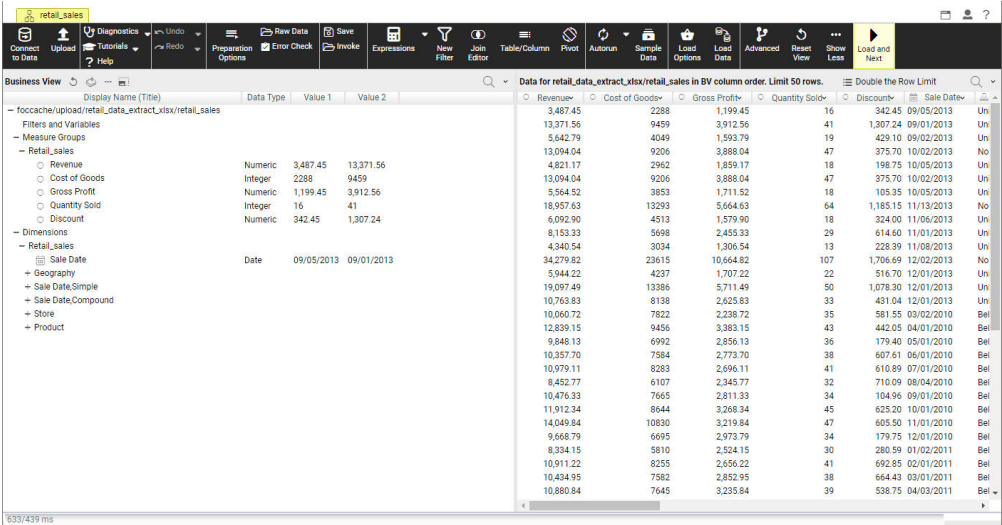
Procedure: How to Upload Excel Spreadsheets

- 1. Launch the Upload wizard in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Upload Data* .
- ☐ From the Legacy Home Page, in the Resources tree, right-click a domain or folder, point to *Upload*, and then click *Data*.
- ☐ In the Open dialog box, in InfoAssist, click *Upload Data*.

- 2. Drag the file that you want to upload into the Upload pane or click *Select File*, and navigate to the location of the file on your machine.

The next screen of the Upload wizard opens, as shown in the image below. You can use the options on this screen to preview and change spreadsheets and delimited data files before you upload them to the target environment. This screen shows you the default breakdown of your data as measures, dimensions, and hierarchies.



Display Name (Title)	Data Type	Value 1	Value 2
focacache/upload/retail_data_extract.xlsx/retail_sales			
Filters and Variables			
Measure Groups			
Retail_sales			
Revenue	Numeric	3,487.45	13,371.56
Cost of Goods	Integer	2288	9459
Gross Profit	Numeric	1,199.45	3,912.56
Quantity Sold	Integer	16	41
Discount	Numeric	342.45	1,307.24
Dimensions			
Retail_sales			
Sale Date	Date	09/05/2013	09/01/2013
Geography			
Sale Date,Simple			
Sale Date,Compound			
Store			
Product			

- 3. On the ribbon, click *Load and Next*.

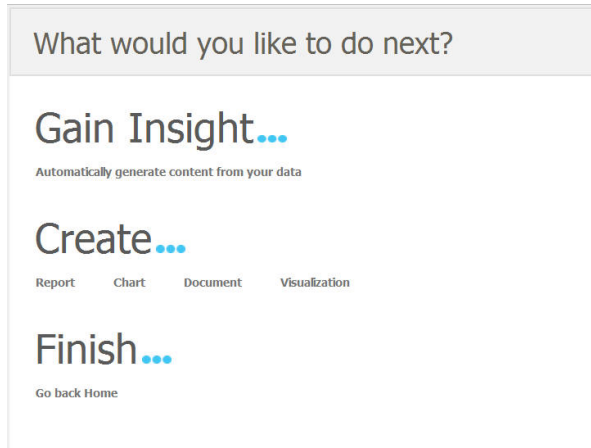
The Target Load Options dialog box opens.

A dialog box opens.

Note: By default, the Bulk Load check box is selected. Clear this check box if you do not have a bulk load program that supports your target environment. For example, if you are using Microsoft SQL Server, you may use a Bulk Copy Program (BCP). If you are unsure about whether you have a bulk load program installed, contact your system Administrator.

4. Click *Proceed to Load*.

If the load is successful, a window opens, and provides options to automatically generate content from your data, create content using the new Master File, or close the Upload wizard, as shown in the following image.



Note: If there are informational messages or if your upload is unsuccessful, the Status screen opens.

5. Select what you want to do next.

Related Information:

- ☐ [Pivoting Repeating Columns Into Rows](#) on page 53
- ☐ [Creating Hierarchies](#)
- ☐ [Creating Clusters](#) on page 55
- ☐ [Creating Folders and Assigning DV Roles](#) on page 56

Procedure: How to Append New Data to an Existing Synonym

1. Launch the Upload wizard.
2. Drag the file containing the data that you want to append into the Upload pane or click *Select File*, and navigate to the location of the file on your machine.

The next screen in the Upload wizard opens.

3. On the ribbon, click *Load Options*.

The Target Load Options dialog box opens.

Note: By default, the Bulk Load check box is selected. Clear this check box if you do not have a bulk load program that supports your target environment. For example, if you are using Microsoft SQL Server, you may use a Bulk Copy Program (BCP). If you are unsure about whether you have a bulk load program installed, contact your system Administrator.

4. From the Load Option drop-down list, click *Append to Existing*.

In the Select Target Synonym dialog box, select the synonym to which you want to append data.

5. Click *OK*.

The Target Load Options dialog box opens.

6. Click *OK*.

The Merge Editor dialog box opens.

7. Click *OK*.

8. On the ribbon, click *Load and Next*.

If the load is successful, a window opens, and provides options to automatically generate content from your data, create content using the new Master File, or close the Upload wizard.

Note: If there are informational messages or if your upload is unsuccessful, the Status screen opens.

9. Select what you want to do next.

Procedure: How to Merge New Data With an Existing Synonym

1. Launch the Upload wizard.
2. Drag the file containing the data that you want to merge into the Upload pane or click *Select File*, and navigate to the location of the file on your machine.

The next screen in the Upload wizard opens.

3. On the ribbon, click *Load Options*.

The Target Load Options dialog box opens.

4. From the Load Option drop-down list, click *Merge into Existing*.

In the Select Target Synonym dialog box, select the synonym to which you want to merge your data.

5. From the If the record exists drop-down list, click the action you want to occur when a record in the new spreadsheet matches a record in the existing data. You can choose to reject the matching record, update the existing record, or delete the existing record. By default, Update the existing record is selected.
6. From the If the record does not exist drop-down list, click the action you want to occur when a record in the new spreadsheet does not match the record in the existing data. You can choose to include or reject the record that does not match the existing record.

Note: By default, the Use Bulk Load to populate and Stage Table + Merge into Target check box is selected. Clear this check box if you do not have a bulk load program that supports your target environment. For example, if you are using Microsoft SQL Server, you may use a Bulk Copy Program (BCP). If you are unsure about whether you have a bulk load program installed, contact your system Administrator.

7. Click *OK*.
8. In the Merge Editor dialog box, you can make additional changes to how your data is merged, for each column in the spreadsheet.

You must create at least one matching expression before you load your data.

9. Click *OK*.
10. On the ribbon, click *Load and Next*.

If the load is successful, a window opens, and provides options to automatically generate content from your data, create content using the new Master File, or close the Upload wizard.

Note: If there are informational messages or if your upload is unsuccessful, the Status screen opens.

11. Select what you want to do next.

Pivoting Repeating Columns Into Rows

Some Excel spreadsheets may contain repeating columns, such as sales figures for a series of years. There may even be repeating column groups, such as both budget and actual figures for a series of years. You can use the pivot option to transform these columns or groups of columns into rows.

Procedure: How to Pivot Columns Into Rows

1. When uploading data or connecting to data on the main metadata screen, on the ribbon, click *Pivot*.

The Pivot Columns to Rows dialog box opens.

2. Set the Pivot Type option to *Repeating column*.
3. In the First column drop-down box, select the first column in the range of repeating columns.
4. In the Last column drop-down box, select the last column in the range of repeating columns.
5. In the Column Title for Pivoted Data, type the new column title that reflects the numeric cell that you are describing.
6. In the Title for Pivoted Key field, type the new column title that represents the repeating columns that you are pivoting into rows.
7. Leave the Formula for Pivoted Key field value unedited. This value is automatically generated by the wizard, it should not be changed.

An example of the completed configuration for pivoting columns is shown in the following image.

Pivot Column(s) to Rows in synonym years

Selected Parameters

? Pivot Type: Repeating column

? First column: 1960

? Last column: 2012

? Column Title for Pivoted Value: Amount (Example: AMOUNT)

? Column Title for Pivoted Key: Year (Example: STMT_YEAR)

? Formula for Pivoted Key: 1960 + ORDER - 1

Cancel OK

8. Click *OK*.

The repeating columns now display as rows. The Pivot button turned into the Remove Pivot button, allowing you to quickly revert your pivoting changes.

Procedure: How to Pivot Column Groups into Rows

1. When uploading data or connecting to data on the main metadata screen, on the ribbon, click *Pivot*.
The Pivot Columns to Rows dialog box opens.
2. Set the Pivot Type option to *Repeating group of columns*.
3. In the Number of groups field, specify the number of groups of columns that you are pivoting.
4. In the Column Title for Pivoted Data, type the new column title that will be used for all the columns across the repeating groups.

5. In the Title for Pivoted Key field, type the new column title that represents the repeating columns that you are pivoting into rows.
6. Edit the automatically generated formula in the Formula for Pivoted Key field by clicking the ellipsis button. Make sure there are no repetitive alphanumeric values in the Pivoted Column field.

An example of the completed configuration for pivoting groups of columns is shown in the following image.

Pivot Column(s) to Rows in synonym groups

Selected Parameters

? Pivot Type: Repeating group of columns

? Number of groups: 6

Pivoting group

? First column in group: 1960_plan

? Last column in group: 1960_actual

? Column Titles for Pivoted Value: Amount Planned/Amount Actual Example: AMT_PLANNED/AMT_FACT

? Column Title for Pivoted Key: Year Example: STMT_YEAR

? Formula for Pivoted Key: DECODE ORDER ('1' '1960' '2' '1961' '3' '1962' '4' '1963' '5' '1964' '6' '1')

Cancel OK

7. Click *OK*.

The repeating groups of columns now display as rows. The Pivot button turned into the Remove Pivot button, allowing you to quickly revert your pivoting changes.

Creating Clusters

When you need to add more tables to your synonym, you can use the Join feature to create a cluster. This allows you to enhance the structure of your synonym by introducing more data.

Procedure: How to Create a Cluster

1. When uploading data or connecting to data on the main metadata screen, on the ribbon, click *Join Editor*.

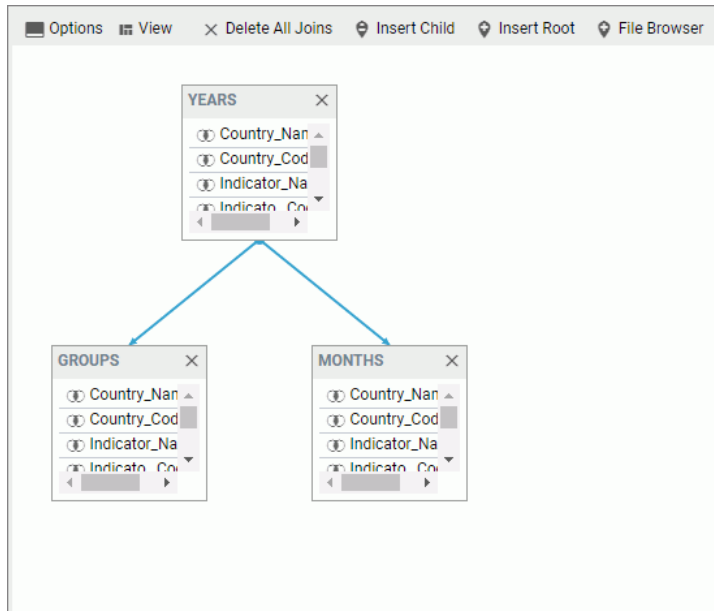
The Join Editor view opens.

2. Click *Insert Child*.

The Insert Child dialog box opens.

3. Click a Master File from the list, select a synonym, and then click *OK*. You can select several synonyms at once.

An example of a completed cluster is shown in the following image.



4. Close the Join Editor dialog box.

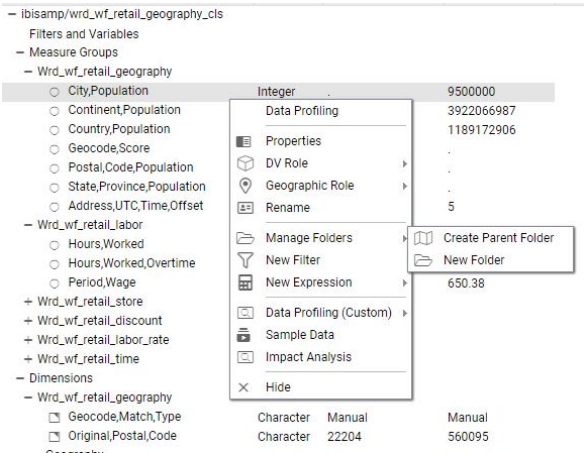
The new columns are added to the Table/Column pane.

5. Drag columns to the Business View pane to modify the synonym.

Creating Folders and Assigning DV Roles

When using BV+, specifically when you are working in a Business View, you can create folders to organize your data. Folders function as segments to provide a view of the synonym and define the accessible fields and their relationships. Folder relationships are the same as segment relationships, with parent folders, child folders, and sibling folders. Once you create a new folder, you can add data fields and assign roles.

You can create a new folder by right-clicking a folder or field, clicking *Manage Folders*, and then clicking *New Folder*, as shown in the following image.

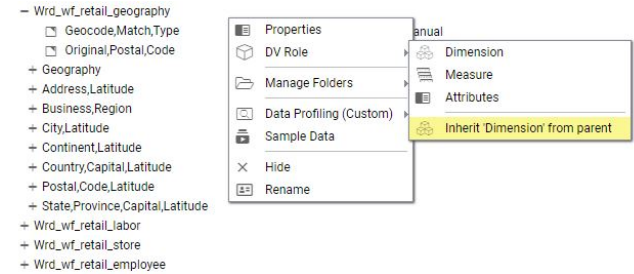


Assigning DV Roles

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.

By default, a Dimension View structure is defined within folders in the Business View pane. You can add either additional Dimension View nodes or folders to this structure.

You can assign a DV role to a folder or field by right-clicking the folder or field and assigning a DV role. The following image shows the context menu and options for a folder.



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.

You can assign the following DV roles.

❑ **Dimension.** A dimension field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, is automatically 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 becomes part of a hierarchy, where the levels depend on the order of the fields in the folder. Then, when AUTODRILL is turned on, automatic drilldowns are created in the report or chart output.

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 alphanumeric, it will be added as a vertical (BY) sort field. A folder or field can be assigned the 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 alphanumeric.

❑ **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.

Connecting to Data and Creating Synonyms

Aside from uploading data, you can create synonyms by connecting to various data sources. The Connect to Data wizard leads you through this process and allows you to establish a connection to many native data sources. 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 or 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.

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 the question mark (?) next to a parameter.

This topic provides step-by-step information that you can use to connect to data in WebFOCUS.

In this chapter:

- ☐ [Creating a Synonym With the Connect to Data Wizard](#)
 - ☐ [Editing And Deleting Metadata](#)
-

Creating a Synonym With the Connect to Data Wizard


The Connect to Data wizard lets you configure adapters that connect to data sources that you can use to build reports, charts, and visualizations.

Using the Connect to Data wizard, you can perform the following in a single environment:

1. **Configure Adapters.** Configure an adapter, create a new connection, or change connection parameters.
2. **Create Base Synonyms.** Create a synonym for one or more data objects.

3. **Create Cluster Synonyms with BV.** Create a cluster synonym for select objects assigned as facts or dimensions.

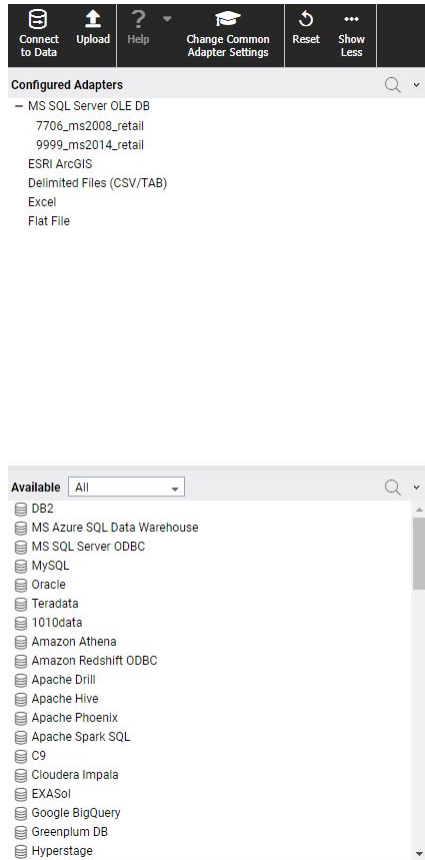
You can launch the Connect to Data wizard in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Connect* .
- ☐ From the Legacy Home Page, in the Resources tree, right-click a domain or folder, point to *Metadata*, and then click *Connect to Data*.
- ☐ In the Open dialog box, in InfoAssist, click *Connect to Data*.

Configuring Adapters

The Connect to Data wizard creates a connection to your data, which will allow you to modify your data for use in WebFOCUS. You can configure a new adapter or connection, add a connection to an existing adapter, or change adapter connections.

When the Connect to Data wizard opens, it displays a panel for configured adapters and a panel for available adapters, as shown in the following image.



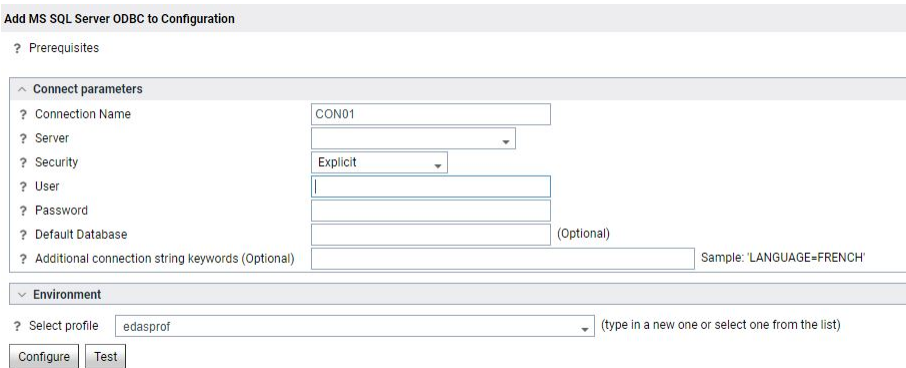
- ❑ **Configured Adapters.** Displays all adapters and connections that have been configured. You can create synonyms and cluster business views from this panel, add new or duplicate connections, remove connections, and view and edit properties.
- ❑ **Available.** Displays all available adapters. If a connection has already been configured for an adapter, a check mark is displayed next to the adapter name. If the adapter has multiple versions, you can select which version to configure when you right-click the adapter name or click its drop-down arrow. You can select a category of adapter to display from a categorical drop-down list. A search option is also available.

Procedure: How to Configure a New Adapter/Connection

1. From the Available panel, right-click an adapter name or click the arrow, and click *Configure*.

Note: If the adapter has multiple versions, right-click the adapter name or click the arrow, and select which version to configure.

The Configure Adapter screen opens, as shown in the following image.



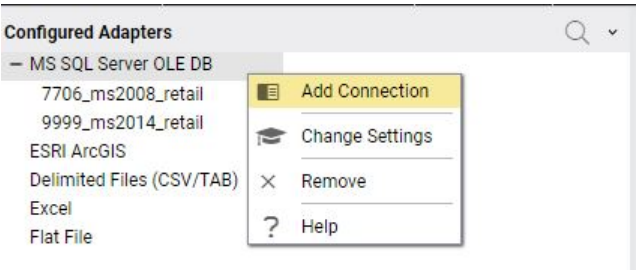
2. Enter the parameters for the specific adapter.
3. Click *Test* to test your configuration.
4. Click *Configure*.

Note: Once configured, the adapter displays in the Configured Adapters panel.

Procedure: How to Add a Connection

1. From the Configured Adapters panel, right-click an adapter name or click the arrow on an adapter line.

A shortcut menu opens, as shown in the following image.



Note: These menu options are for a SQL adapter. Options may differ for different categories of adapters.

2. Click *Add Connection*.
3. Enter the parameters for the specific adapter.
4. Click *Test* to test your configuration.
5. Click *Configure*.

Procedure: How to Change a Connection

1. From the Configured Adapters panel, right-click an adapter name or click the arrow on an adapter line.
2. Click *Change Settings*.
3. Change the parameters for the specific connection and click *Configure*.

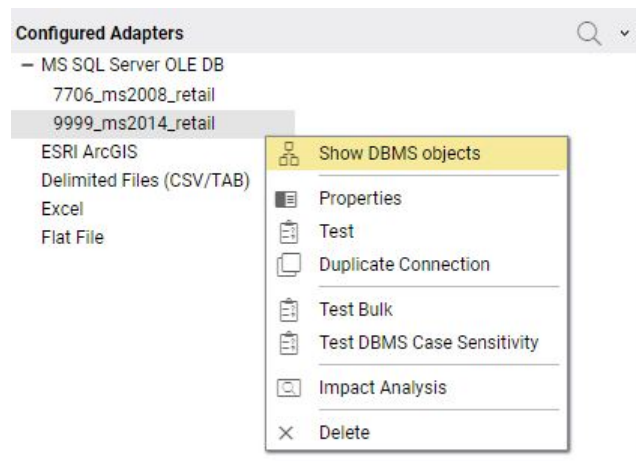
Creating Synonyms

You can enter all the parameters needed to create base synonyms or create a cluster synonym on a single page.

Procedure: How to Create a Synonym

1. From the Configured Adapters panel, right-click a connection name or click the arrow on a connection line.

A shortcut menu opens, as shown in the following image.

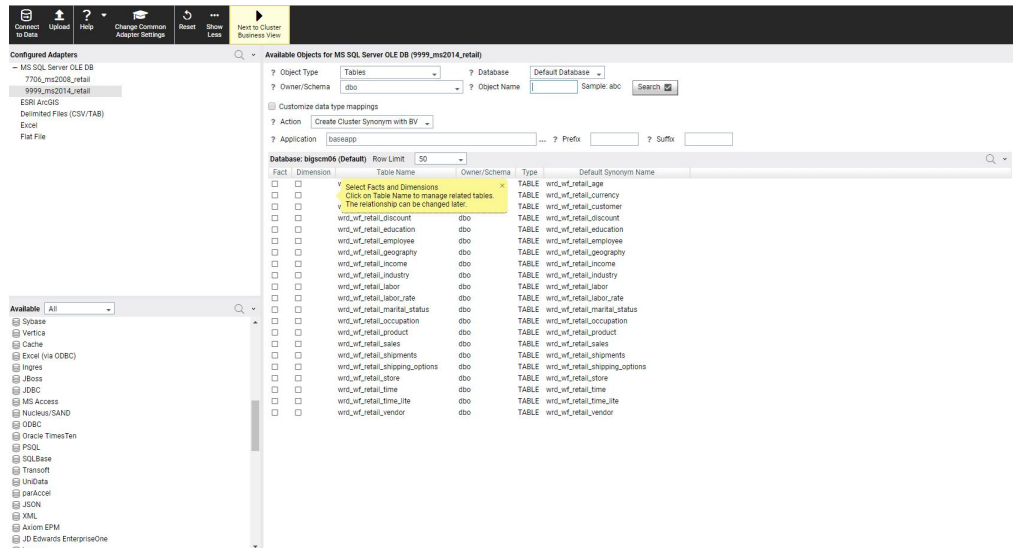


Note: These menu options are for a SQL adapter. Options may differ for different categories of adapters.

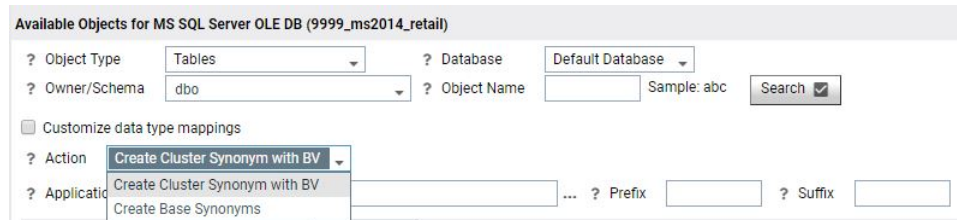
Creating a Synonym With the Connect to Data Wizard

2. Click *Show DBMS objects* from the shortcut menu.

The Available Objects page opens, as shown in the following image.



3. Select from the Available Objects parameters.
4. From the Action drop-down list, select *Create Cluster Synonym With BV* (default) or *Create Base Synonyms* as shown in the following image.

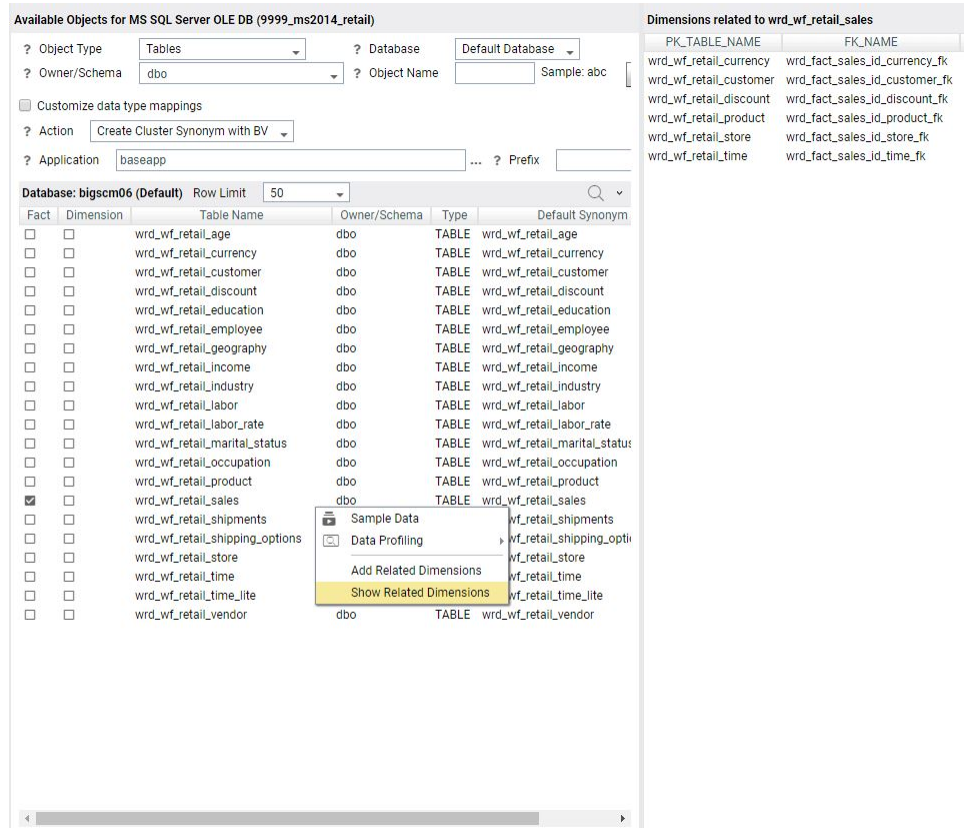


Procedure: How to Create a Cluster Synonym With BV

1. Click *Create Cluster Synonym with BV* from the Action drop-down list.
2. Manually select objects as Facts and Dimensions for which you want to create a cluster synonym. To automatically select Facts and Dimensions, proceed to step 3. Otherwise, proceed to step 5.
3. Right-click a fact or dimension table name, or click the arrow next to a fact or dimension table name and select *Show Related Dimensions*

Note: Option only for Relational data sources if Foreign Key to Primary key information is available in the RDBMS.

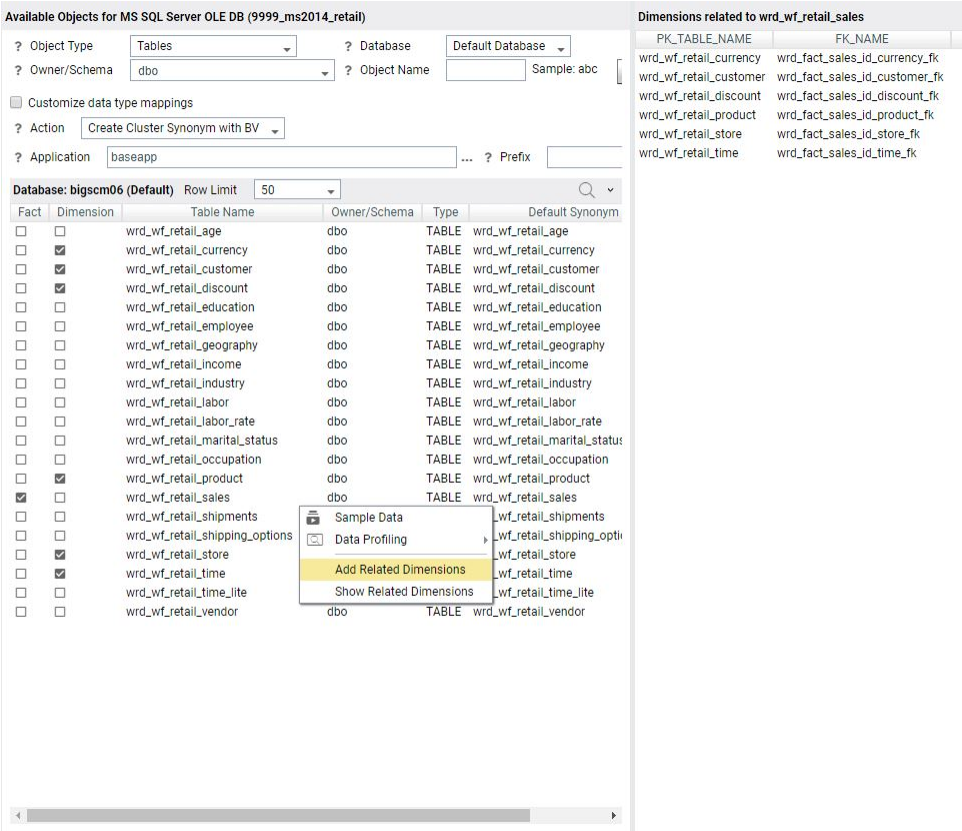
A report of related dimensions displays, as shown in the following image.



- Right-click a fact or dimension table name or click the down arrow next to a fact or dimension table name and select *Add Related Dimensions*

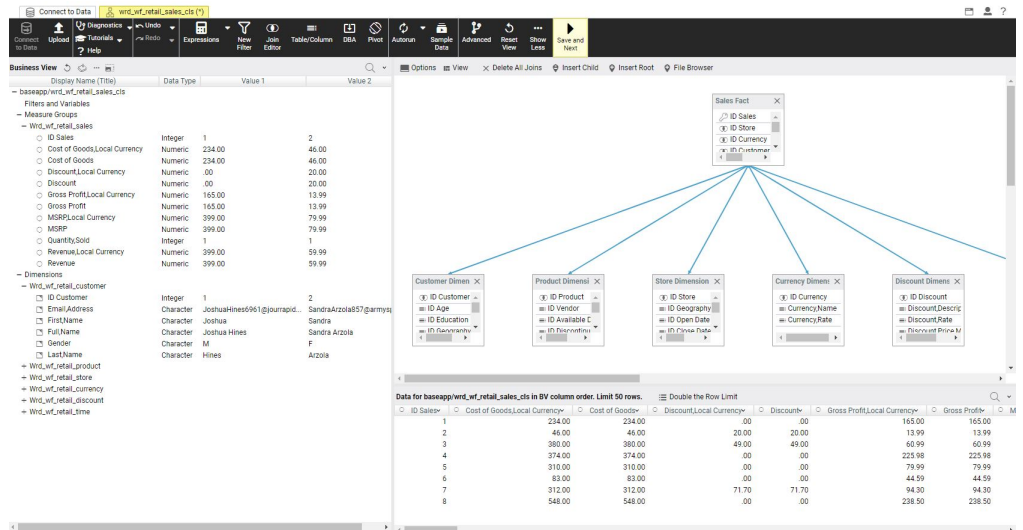
Note: Option only for Relational data sources if Foreign Key to Primary key information is available in the RDBMS.

All related dimensions are selected automatically, as shown in the following image.



5. Click *Next to Cluster Business View* on the ribbon.

Your cluster selection displays, as shown in the following image.



- Enhance your cluster synonym from the panels or ribbon as needed.
- Click *Save and Next* on the ribbon.
- Change the cluster name in the *File Name* field of the *Save As* dialog box if needed.
- Click *OK*.

Procedure: How to Create a Base Synonym

- Select *Create Base Synonyms* from the Action drop-down list.

Creating a Synonym With the Connect to Data Wizard

- 2. Select check boxes of the objects for which you want to create synonyms, as shown in the following image.

Available Objects for MS SQL Server OLE DB (9999_ms2014_retail)

? Object Type

Tables

? Database

Default Database

? Owner/Schema

dbo

? Object Name

Sample: abc

Search

☐ Customize data type mappings

? Action

Create Base Synonyms

? Application

baseapp

... ? Prefix

? Suffix

Database: bigscm06 (Default) Row Limit: 50

<input type="checkbox"/>	Table Name	Owner/Schema	Type	Default Synonym Name
<input type="checkbox"/>	wrd_wf_retail_age	dbo	TABLE	wrd_wf_retail_age
<input type="checkbox"/>	wrd_wf_retail_currency	dbo	TABLE	wrd_wf_retail_currency
<input type="checkbox"/>	wrd_wf_retail_customer	dbo	TABLE	wrd_wf_retail_customer
<input type="checkbox"/>	wrd_wf_retail_discount	dbo	TABLE	wrd_wf_retail_discount
<input type="checkbox"/>	wrd_wf_retail_education	dbo	TABLE	wrd_wf_retail_education
<input type="checkbox"/>	wrd_wf_retail_employee	dbo	TABLE	wrd_wf_retail_employee
<input type="checkbox"/>	wrd_wf_retail_geography	dbo	TABLE	wrd_wf_retail_geography
<input type="checkbox"/>	wrd_wf_retail_income	dbo	TABLE	wrd_wf_retail_income
<input type="checkbox"/>	wrd_wf_retail_industry	dbo	TABLE	wrd_wf_retail_industry
<input type="checkbox"/>	wrd_wf_retail_labor	dbo	TABLE	wrd_wf_retail_labor
<input type="checkbox"/>	wrd_wf_retail_labor_rate	dbo	TABLE	wrd_wf_retail_labor_rate
<input type="checkbox"/>	wrd_wf_retail_marital_status	dbo	TABLE	wrd_wf_retail_marital_status
<input type="checkbox"/>	wrd_wf_retail_occupation	dbo	TABLE	wrd_wf_retail_occupation
<input type="checkbox"/>	wrd_wf_retail_product	dbo	TABLE	wrd_wf_retail_product
<input checked="" type="checkbox"/>	wrd_wf_retail_sales	dbo	TABLE	wrd_wf_retail_sales
<input type="checkbox"/>	wrd_wf_retail_shipments	dbo	TABLE	wrd_wf_retail_shipments
<input type="checkbox"/>	wrd_wf_retail_shipping_options	dbo	TABLE	wrd_wf_retail_shipping_options
<input type="checkbox"/>	wrd_wf_retail_store	dbo	TABLE	wrd_wf_retail_store
<input type="checkbox"/>	wrd_wf_retail_time	dbo	TABLE	wrd_wf_retail_time
<input type="checkbox"/>	wrd_wf_retail_time_life	dbo	TABLE	wrd_wf_retail_time_life
<input type="checkbox"/>	wrd_wf_retail_vendor	dbo	TABLE	wrd_wf_retail_vendor

- 3. Select Next to Base Synonyms on the ribbon. Your synonym selection displays, as shown in the following image.

Connect to Data wrd_wf_retail_sales

Connect to Data

Upload

Download

Export

Import

Help

Expressions

New Filter

Data Editor

Table/Column

UDA

Pivot

Auton

Server Data

Advanced

Reset View

Show Less

Save and Next

Table / Column

Display Name (Title)

Data Type

Value 1

Value 2

baseapp/wrd_wf_retail_sales

Display Name (Title)

Data Type

Value 1

ID Sales

ID Store

ID Currency

ID Customer

ID Discount

ID Product

ID Time

Cost of Goods/Local Currency

Cost of Goods

Discount/Local Currency

Discount

Gross Profit/Local Currency

Gross Profit

MSPR/Local Currency

MSPR

Quantity/Sold

Revenue/Local Currency

Revenue

Indexes

baseapp/wrd_wf_retail_sales

Filters and Variables

Measure Groups

Dimensions

ID Sales

ID Store

ID Currency

ID Customer

ID Discount

ID Product

ID Time

Cost of Goods

1

0

1

175889

100

7005

2195

2

0

1

245541

104

1154

2195

3

0

1

230444

101

1014

2195

4

0

1

213958

100

1109

2195

5

0

1

23113

100

1007

2195

6

0

1

232043

100

2165

2195

7

0

1

11162

102

2102

2195

8

0

1

208088

100

2104

2195

9

0

1

61715

100

1019

2195

10

0

1

55649

100

2002

2195

11

0

1

159686

105

6011

2195

12

0

1

28938

100

1015

2195

13

0

1

56206

104

2008

2195

14

0

1

40414

104

1109

2195

15

0

1

189952

100

5012

2195

16

0

1

72293

100

2103

2195

17

0

1

258655

103

1012

2195

18

0

1

94646

100

7003

2195

19

0

1

12673

100

1005

2195

20

0

1

13567

100

2165

2195

21

0

1

13902

100

2162

2195

22

0

1

39122

100

5005

2195

23

0

1

119363

100

2103

2195

24

0

1

119726

100

1107

2195

25

0

1

186599

100

5013

2195

26

0

1

14826

100

7003

2195

27

0

1

99444

100

2007

2195

28

0

1

237172

100

2007

2195

29

0

1

156777

100

1011

2195

30

0

1

47902

100

2165

2195

31

0

1

162706

100

6016

2195

32

0

1

243820

100

2166

2196

33

0

1

14903

100

2164

2196

34

0

1

16914

101

3014

2196

35

0

1

224579

100

2162

2196

36

0

1

76108

100

2155

2196

37

0

1

14807

100

2154

2196

38

0

1

229724

100

1016

2196


68

Information Builders

4. Enhance your base synonym from the panels or ribbon as needed.
5. Click *Save and Next* on the ribbon.
6. Change the base synonym name in the *File Name* field of the *Save As* dialog if needed.
7. Click *OK*.

Editing And Deleting Metadata

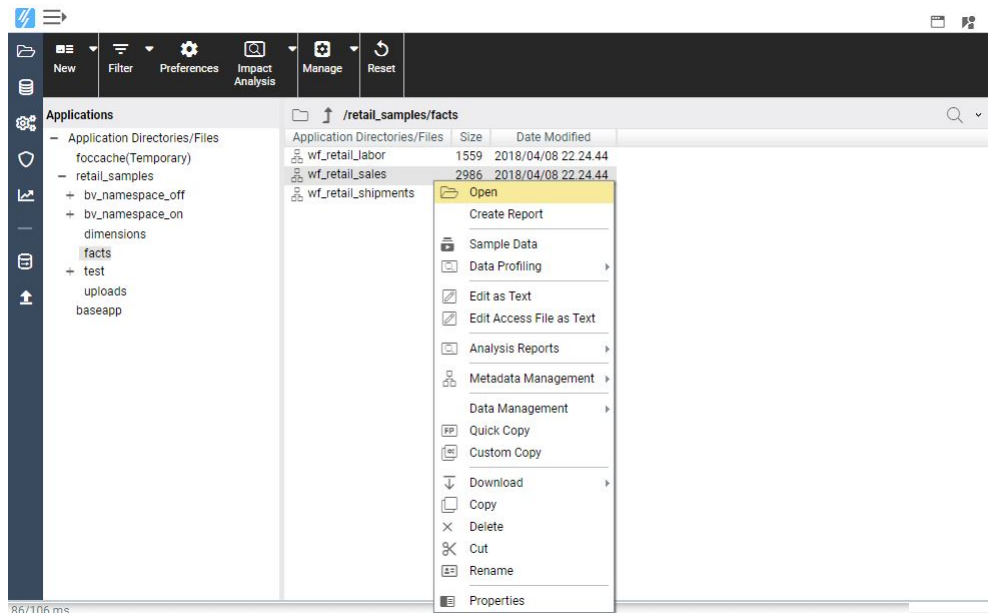
You can edit or delete previously created synonyms in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Metadata* .
- ☐ From the Legacy Home Page, in the Resources tree, right-click a folder or domain, point to *Metadata* and then click *Edit*.

The Applications page opens, from which you can edit or delete your synonym.

Procedure: How to Edit a Synonym

1. From the Applications page, in the Application Directories tree, left-click a folder to expand it, then right-click a procedure or metadata file in the file panel and select *Open*, as shown in the following image.



The Data Assist opens, where you can modify your synonym.

2. Make edits to the synonym, as required.
3. To save your synonym, click *File*, and then click *Save*.
4. Close the Reporting Server window.

***Procedure:* How to Delete a Synonym**

1. To remove the synonym file from the view, right-click the synonym and then click *Delete*.
A confirmation window opens.
2. Click *OK* to proceed.

Creating Content in WebFOCUS

From the WebFOCUS Home Page, you can create various types of content. This topic gives you an overview of the available content items and describes how to create them in your WebFOCUS environment.

In this chapter:


- ❑ [Types of Content in WebFOCUS](#)
 - ❑ [Creating Blogs](#)
 - ❑ [Creating Shortcuts](#)
 - ❑ [Creating URLs](#)
 - ❑ [Uploading Files](#)
 - ❑ [Sharing Content in WebFOCUS](#)
-










Types of Content in WebFOCUS




There are many types of content that you can create in WebFOCUS, using the action bar on the Home Page. The most common content items include: charts, visualizations, reports, and pages. To access more options, click *More*.

Note: Access to all options on the actions bar is determined by your role in a domain. Contact your administrator to obtain access to additional options.

The following table lists and describes all of the content items that you can create from the WebFOCUS Home Page.

Action Button	Description
	Chart. Creates a graphical representation of your data created in InfoAssist. To learn more about creating charts, see <i>WebFOCUS InfoAssist User's Manual</i> .

Action Button	Description
	Visualization. Creates a graphical representation of your data, comprised of one or more visuals. Visuals can be charts, maps, or grids. To learn more about creating visualizations, see <i>WebFOCUS InfoAssist User's Manual</i> .
	Report. Creates a tabular representation of your data created in InfoAssist. To learn more about creating reports, see <i>WebFOCUS InfoAssist User's Manual</i> .
	Document. Creates a customized document in InfoAssist. To learn more about creating documents, see <i>WebFOCUS InfoAssist User's Manual</i> .
	Reporting Object. Creates a report procedure (FEX) that is a tailored view of data that groups or individual users use to create personal reports quickly, and in compliance with the reporting rules and guidelines of your company.
	Sample Content. A set of sample charts, reports, and dashboard that is generated automatically based on uploaded Excel workbooks, CSV files, or existing single-segment Master Files in your repository.
	Page. Launches WebFOCUS Designer, where you can create a flexible interactive application for various BI content, including charts, visualization, reports, maps, URLs, and other resources.
	Collaborative portal. Creates an analytical content management and deployment system that provides a flexible environment for users to access BI content, including visualizations, reports, charts, maps, and interactive InfoApps.
	Portal Page. Creates a page from which you can organize dynamic content. A portal page can be created as part of a portal, in which case it resides in the <i>Resources</i> folder of that portal by default. Portal pages can only be viewed inside a portal.
	Blog. Creates an interactive item that operates as commonly seen blogs on the internet, and allows users to post and view comments.


Action Button	Description
	Alert procedure. Creates a report procedure that evaluates whether a defined condition is true or a file exists to determine whether to run (trigger) the specified or referenced report request. ReportCaster can be used to schedule and distribute an Alert report and specify how the Alert test should be evaluated after it has been triggered.
	Access List. Specifies the groups and users that the private Library report can be shared. To learn more about Access Lists, see the <i>ReportCaster Guide</i> technical content.
	Distribution List. Specifies the email addresses, directory locations, or printers that you can configure to distribute a schedule. This includes Email, FTP, or Printer. To learn more about working with distribution lists, see the <i>ReportCaster Guide</i> technical content.
	Schedule. Specifies when to run a report procedure, how to distribute the report (Email, FTP, Report Library, Printer), and the destination to which the report will be distributed. This is available when you are licensed for ReportCaster. To learn more about working with schedules, see the <i>ReportCaster Guide</i> technical content.
	Text Editor. Opens a simple editor where you can create, view, and edit the source code for procedures, procedure components, Master Files and Access Files, and other types of files.
	URL. Creates a link to a web page that can be displayed inside a portal or page or within the WebFOCUS repository.
	Shortcut. Creates a shortcut to a repository file or a Master file.
	Upload File. Uploads files such as images and office documents to the repository.

Creating Blogs

You can create blogs and include them in your collaborative portals. A blog is an interactive content item that operates as commonly seen blogs on the internet, and allows users to post and view comments. Blogs abide by the same security rules that apply to other items in the repository. You can publish, unpublish, hide, and move blogs between domains or folders. You can also share blogs with other users and groups.

Procedure: How to Create a Blog

1. Select the domain or folder where you want your new blog to reside.

2. On the actions bar, click *Blog* .

The New Blog dialog box opens.

3. Type the requested information in the dialog box, as follows.

☐ **Title.** Identifies the blog in the Resources tree.

☐ **Summary.** Provides an optional explanation of the blog. It is displayed in the tool tip, when you hover over the blog.

4. Click *OK*.

The new blog item appears in the selected location.

5. Right-click your new blog, and then click *Edit*.


The Comments window opens.


6. Click the *Add comment* link to add a new comment.

7. Once you are done adding and editing comments, click *Post*, and close the Comments window.

8. You can optionally interact with comments using the following commands:

☐ Click the *Refresh* icon  to refresh comments.

☐ Click the *Search* button , and type a key word or words in the search field, to search through comments. You can specify the search criteria by clicking the drop-down arrow and selecting search criteria, such as user name, content, or meta tags.


☐ Click the *Remove All* button  to remove all comments from all users. Remove All is only available to users with the Manage Comments privilege.

You can now publish, share, and add your blog to a portal page or portal.

Creating Shortcuts

You can create shortcuts to repository files and Master files. Once a shortcut to a Master file is created, you can use it to build visualizations and reports. Once a shortcut to a repository file is created, you can copy, delete, edit, and run this item. You can also publish and share your shortcuts to make them available for other users and groups.

Procedure: How to Create a Shortcut to a Repository File

1. Select the domain or folder where you want your new shortcut to reside.
2. On the actions bar, click *Shortcut* .


The New Shortcut dialog box opens.
3. Click *Browse*.

The Select dialog box opens.
4. Using the Breadcrumb Trail, navigate to the resource of your choice, such as folder, report, chart, or visualization, and then click *Select*.

The Title field populates with the name of the original item, and the word *Shortcut*. For example, if you create a shortcut to the item *Chart1*, the shortcut title will be *Chart1 - Shortcut*.
5. Optionally, you can edit the Title and populate the Summary field.
6. Click *OK*.

The new shortcut appears in the selected location.

Procedure: How to Create a Shortcut to a Master File

1. Select the domain or folder where you want your new shortcut to reside.
2. On the actions bar, click *Shortcut* .

The New Shortcut dialog box opens.

3. Click the Master file radio button, as shown in the following image


4. Click *Browse*.
The Select dialog box opens.
5. Navigate to the Master File you to which you want to create a shortcut, and then click *Select*.
The Title field populates with the name of the original item.
6. Optionally, edit the Title and populate the Summary field.
7. Click *OK*.
The new shortcut appears in the selected directory.

Creating URLs

You can create URLs to webpages and store them within the repository. These URLs can further enhance analytics, by providing an additional interactive context to your data. You can run a URL from the Home Page, use it in a portal, or add it to a personal page. If your URL is optimized for use in an iFrame, you can embed it within a container on a page. You can also publish and share a URL to make it available to other users and groups.

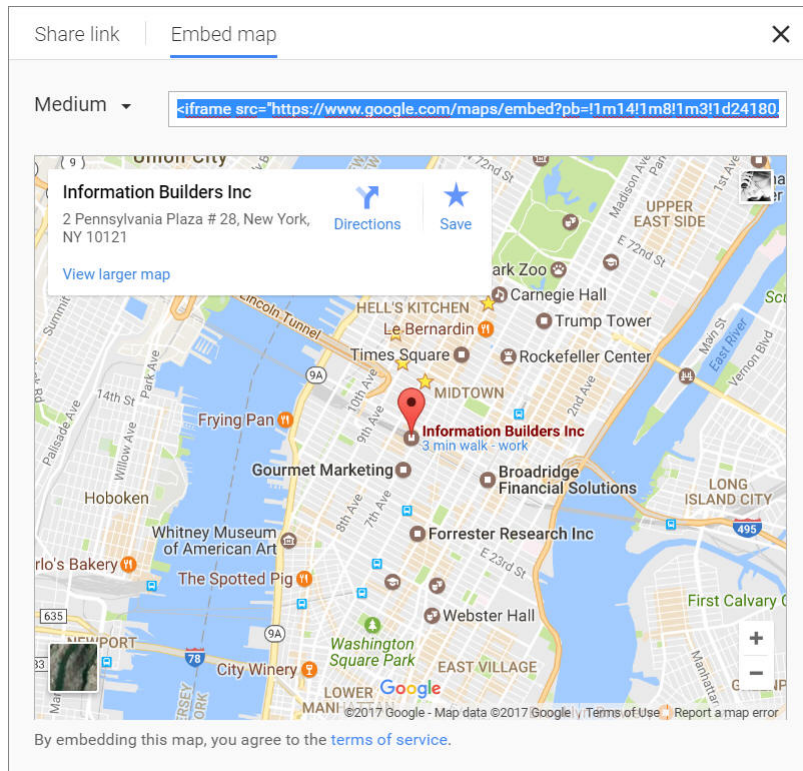
Note: Some web pages cannot be run inside an iFrame or inside the preview Run window on the Home Page. You can run these web pages in a new browser tab or window.


Procedure: How to Create a URL

1. Select the domain or folder where you want your new URL to reside.
2. On the actions bar, click **URL** .
The New URL dialog box opens.
3. Type a Title for the URL, type the address of the URL, and then click **OK**.
The URL now appears in your selected location.

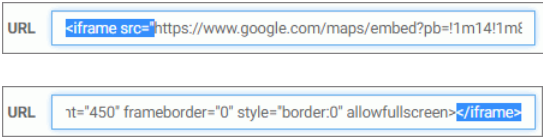
Procedure: How to Embed an iFrame-Optimized URL in a Portal or Page

1. Copy an iFrame-optimized URL from the web, as shown in the following image.

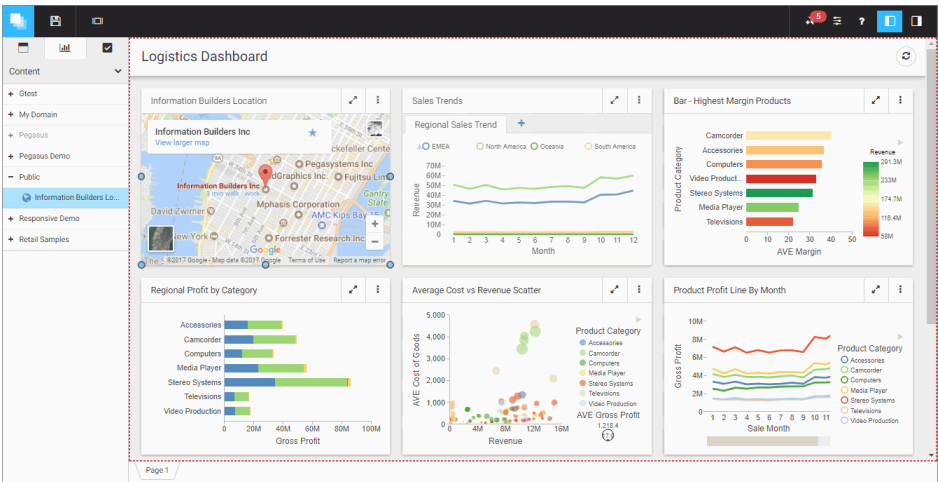


2. Select the domain or folder where you want your new URL to reside.
3. On the actions bar, click **URL** .
The New URL dialog box opens.

- 4. Populate the Title field, and paste the copied URL in the URL field.
- 5. Remove any iFrame related syntax that surrounds your URL. Examples are shown in the following images.



- 6. Click OK to close the New URL dialog box.
- Your URL item is complete and ready to be displayed in a portal or page.
- 7. Using WebFOCUS Designer or the Portal Designer, add your new URL to a portal or page.
- The URL content displays within the container, similar to other content items, as shown in the following image.




Note: This procedure is applicable to WebFOCUS Designer pages and portal pages.

Uploading Files

In addition to creating content using WebFOCUS, you can upload other files, such as images and documents. These files can be used to enhance visualizations and shared with other users and groups.

Procedure: How to Upload Files From The Actions Bar

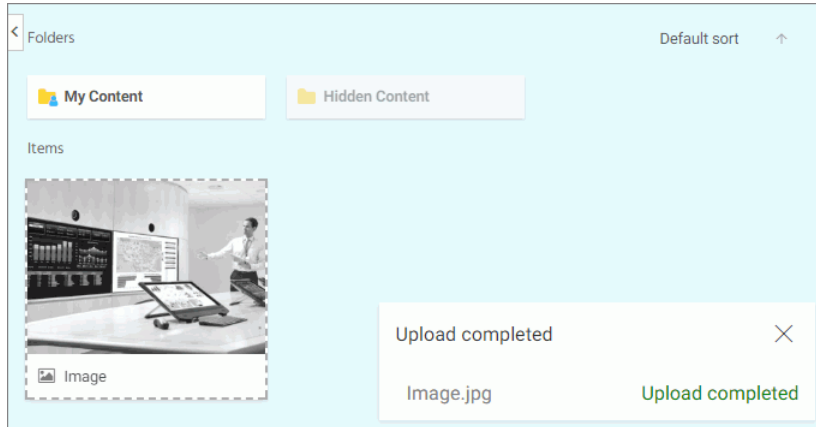
- 1. Select the domain or folder where you want your uploaded file or files to reside.

2. On the actions bar, click *Upload File* .

The Open dialog box opens.

3. Select one or multiples files from your machine and click *Open*.

The file uploads to your selected directory, and the *Upload completed* message appears, as shown in the following image.



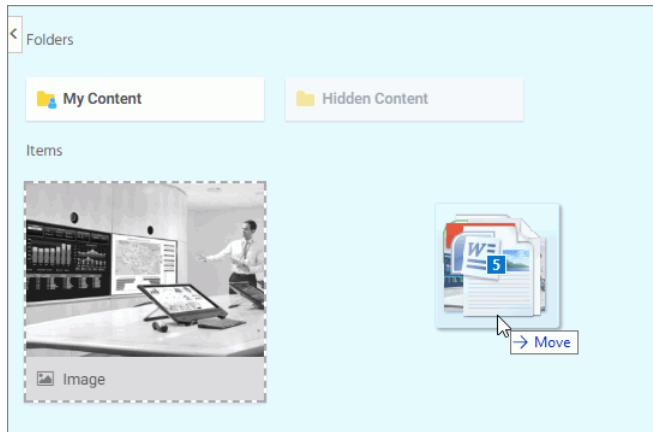
4. Close the *Upload completed* message and proceed with using the uploaded file.

Note: When you upload an image, such as a .bmp, .jpg, .jpeg, .gif, or .png file, to the repository, an embedded thumbnail of the image automatically generates in the WebFOCUS Explorer. To change the thumbnail that appears in the WebFOCUS Explorer, right-click the thumbnail, and open the Properties panel. Click the *Advanced tab*, and modify the thumbnail.

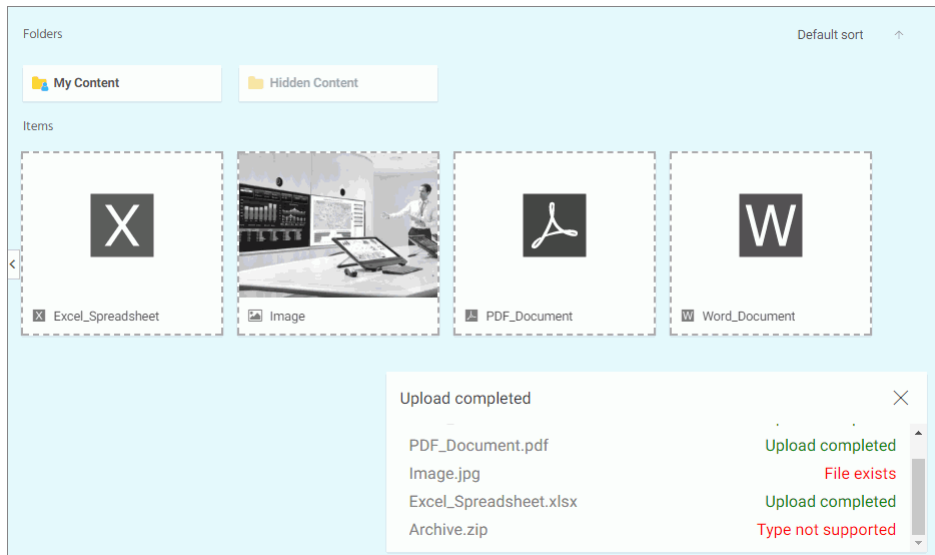
Procedure: How to Upload Files by Dragging to the Explorer

1. Select the domain or folder where you want your uploaded file or files to reside.

2. Drag one or multiple files from your machine directly to the WebFOCUS Explorer, as shown in the following image.



The file uploads to your selected directory and the *Upload completed* message shows the status of each uploaded file. If an upload fails, the error appears in red in the *Upload completed* message, as shown in the following image.



3. Close the *Upload completed* message and proceed with using the uploaded files.

Note: When you upload an image, such as a .bmp, .jpg, .jpeg, .gif, or .png file, to the repository, an embedded thumbnail of the image automatically generates in the WebFOCUS Explorer. To change the thumbnail that appears in the WebFOCUS Explorer, right-click the thumbnail, and open the Properties panel. Click the *Advanced tab*, and modify the thumbnail.

Sharing Content in WebFOCUS

Each domain in the repository, except the Public domain, comes with the private My Content folder. Whenever you create content inside the My Content folder, this content remains private and only visible to you, unless you share it with other users and groups. You can share content in one of two ways:

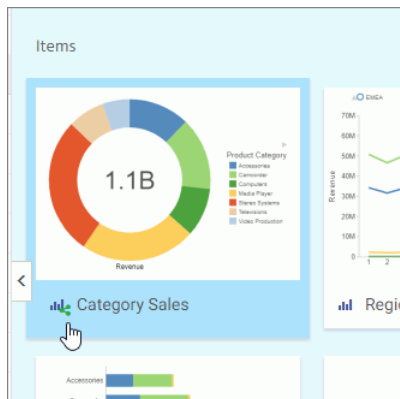
- ☐ **Share with all users.** This method makes the content available to all users that have access to the domain.
- ☐ **Share with specific users and groups.** This method allows you to choose which users and groups get access to your private content.

In both scenarios you can easily revoke access to your content by unsharing it.

Procedure: How to Share Content with All Users

1. In the Resources tree, navigate to a domain of your choice and open the *My Content* folder.
2. In the My Content folder, right-click the item that you want to share, and then click *Share*.

The Share icon now displays next the default icon, as shown in the following image.



The item is now shared with all users that have access to this domain.

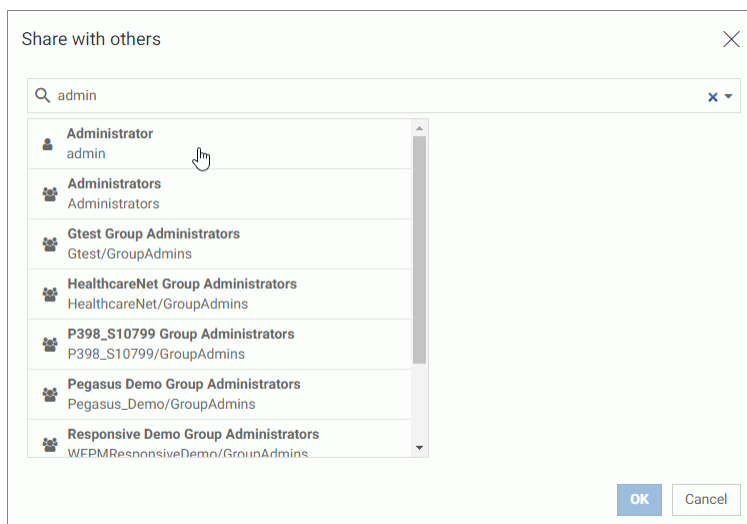
3. To unshare the item, right-click it, and then click *Unshare*.

Procedure: How to Share Content with Specific Users and Groups

1. In the Resources tree, navigate to a domain of your choice and open the *My Content* folder.
2. In the My Content folder, right-click the item that you want to share, and then click *Share with*.

The Share with other dialog box opens.

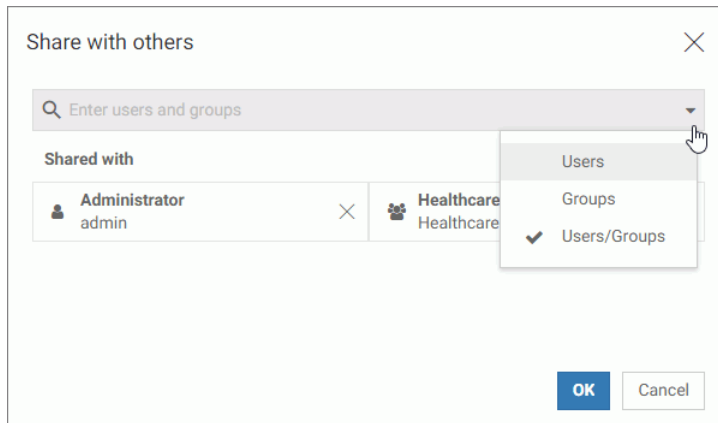
3. In the Search field type the name of the user or group with which you want to share this item.
4. Click the correct entity from the drip down list, as shown in the following image.



The name now displays below the Search field. The item is shared.

5. Optionally, add more users or groups.

You can narrow your search by clicking an arrow and selecting *Users* or *Groups*, as shown in the following image.



6. Once you are happy with your choices, click *OK*.

The icon now indicates that the item is shared. You can unshare it at any time or go back to the Share with others dialog box and edit your choices.

Understanding the Structure of Business Intelligence Portals

This topic gives you an overview of the structure of a BI Portal, describes their components and explains how to launch and navigate the Portal Designer.

In this chapter:

- ☐ [Identifying Business Intelligence Portals](#)
- ☐ [Portal Architecture](#)
- ☐ [Portal Designer Overview](#)
- ☐ [Portal Components](#)

Identifying Business Intelligence Portals

You can create two types of portals in WebFOCUS: basic and collaborative. Basic portals reside under the Portals node, in the Resources tree, on the Legacy Home Page, while collaborative portals are part of the domains in your Repository. Collaborative portals appear under domains in the Legacy Home Page and the WebFOCUS Home Page. From the Legacy Home Page, you can access your collaborative portals under the Domains node. By default, both basic and collaborative portals are available. To change these defaults, an administrator can clear the corresponding check box in the WebFOCUS Administration Console. When the collaborative portal is enabled in your environment, the shortcut menu options for domains and folders include the ability to create new portals and individual pages. You can copy, paste, and move portals and pages between domains and folders, creating a fluid workflow and possibilities for sharing, securing, reusing, and modifying content.

Basic portals are characterized by the following features:

- ☐ Portal pages are included in the portal structure and cannot be shared across portals.
- ☐ Since portal pages can only be created inside a portal, only Developers can create and edit both portals and portal pages.
- ☐ Administrators must use security rules to establish a workflow between domain groups and portals. To simplify this process, domain templates were created.

Collaborative portals are characterized by the following features:

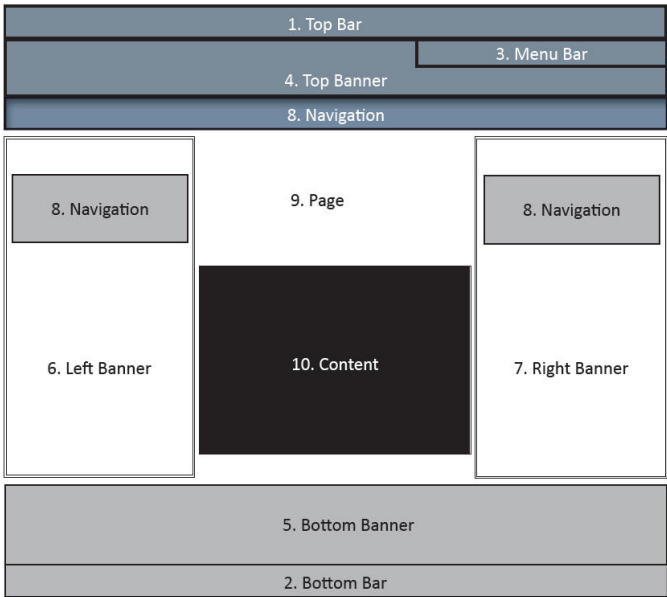
- ☐ Portal pages and portals exist as distinct objects in the Repository.

- ❑ You can copy or link pages to one or more portals.
- ❑ You can unlink portal pages from all portals and store them as standalone content items.
- ❑ You can copy, paste, and move portals and portal pages between domains and folders.
- ❑ Creating portal pages and creating portals can be assigned to different user roles.
- ❑ Most portals do not require special security rules.

In addition to these structural differences, collaborative portals offer several usability enhancements, such as pre-configured page templates, commenting and blogs, the Page Designer, aliasing, and embedding capabilities. The following sections describe the architecture and components of a basic portal, as well as the features that are available to the users of the collaborative portal.

Portal Architecture

A portal consists of several components, as shown in the following diagram.



- ❑ **Component 1 - Top Bar.** The Top Bar is one of three components that can contain the Menu Bar. The Top Bar appears as a component on a portal only if it contains the Menu Bar. The Top Bar cannot contain any item other than the Menu Bar.

- ❑ **Component 2 - Bottom Bar.** The Bottom Bar is one of three components that can contain the Menu Bar. The Bottom Bar appears as a component on a portal only if it contains the Menu Bar. The Bottom Bar cannot contain any item other than the Menu Bar.
- ❑ **Component 3 - Menu Bar.** This is a menu of links, which can be contained in the Top Banner (as shown in the preceding diagram), or in the Top Bar or Bottom Bar. The default location for the Menu Bar is in the Top Banner, with a right alignment of the links. The Menu Bar contains items such as:
 - ❑ User ID (not a link)
 - ❑ Help
 - ❑ Sign In or Sign Out
- ❑ **Components 4-7 - Banner Areas.** Banner areas are the equivalent of headings and footings in a document. They are always present in the portal no matter what page you are on. They can appear on the top, left, right, and bottom of the screen, as shown in the preceding diagram. Each banner area is optional. Banner areas can contain any type of content available in the BI Portal.

A banner works just like a page. It has the same layout options described in [Portal Pages](#) on page 108.

The Top Banner may appear as a component on a portal whether or not it contains the Menu Bar.
- ❑ **Component 8 - Navigation.** Relative to the page area, the navigation menu can appear on top, to the left, to the right, or not at all.
- ❑ **Component 9 - Page.** This is the area in which actual content is placed. Within this area, you have panels containing content.
- ❑ **Component 10 - Content.** This is the actual page content that exists in different containers that can hold any items, from text to reports.

Portal Pages

A portal can be made up of as many pages as you like. Each portal page can create an entry in the navigation structure. A portal page can have one of the following layouts:

- ❑ **Single Area.** Creates a free-flowing area, where there is no grid. This is the default.
- ❑ **Fluid Canvas.** Arranges content evenly, and redistributes space as more items are added.

- ☐ **One Column.** Stretches content to fill the entire page area.

Note: This layout is always used to create a responsive portal page. For more information, see [Building a Basic Responsive Portal](#) on page 139.

- ☐ **Two Columns.** Divides the page evenly into two columns.
- ☐ **Three Columns.** Divides the page evenly into three columns.
- ☐ **Four Columns.** Divides the page evenly into four columns.

When you select any option other than Single Area, any items that you add to the page automatically snap to place in the layout.

Containers

Containers hold content on portal pages. The following are the types of containers available when you create Business Intelligence Portals:

- ☐ Panel
- ☐ Accordion
- ☐ Tabbed
- ☐ Responsive
- ☐ Easy Selector

You can resize containers to accommodate spacing requirements of your page. You can also minimize containers, including those that reside on a locked page. For more information on each type of container, see [Containers](#) on page 111.

Portal Designer Overview

This topic explains how to create a portal and launch the Portal Designer. It also describes the different components of the Portal Designer interface.

Creating a Portal

You can create a portal in one of the following ways:

- ☐ From the Legacy Home Page, under the Portals node, using the *New Portal* option.
- ☐ From the Legacy Home Page, by adding a portal to a domain template when you create a new domain.
- ☐ From the Legacy Home Page, under the Domains node, using the *Collaborative Portal* option, when you select a domain folder.

- ☐ From the WebFOCUS Home Page, when you select a domain or folder, and click *Portal* on the actions bar.

Procedure: How to Create a Basic Portal

1. Sign in to WebFOCUS.
2. On the Legacy Home Page, in the Resources tree, right-click the *Portals* node, and then click *New Portal*.

The New Portal dialog box opens.

3. Supply the requested information on the dialog box, as follows.

- ☐ **Title.** Value displayed in the tree that users use to identify the portal.
- ☐ **Name.** Type a descriptive name for your portal. The name will be used throughout the WebFOCUS application.
- ☐ **URL.** The URL is generated based on the portal name. Another user can enter this URL to access your portal without going to the WebFOCUS Home page.
- ☐ **Security.** Select the *Give others access* check box to bring up the security dialog box when the Portal Designer opens.

4. Once you have completed the fields, click *Create*.

The portal generates, and is now available under the Portals node. If you did not select the *Give others access* check box, the Portal Designer opens.

If you did select the *Give others access* check box, the Security Rules dialog box opens. Use it to set the access rules for the portal. For more information, see [Security](#) on page 100.

Procedure: How to Create a Basic Portal While Creating a Domain

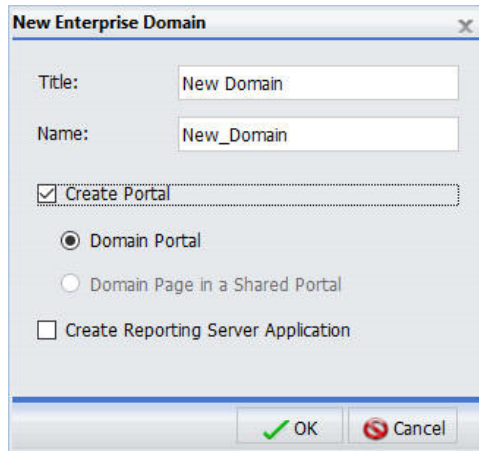
1. Sign in to WebFOCUS.
2. On the Legacy Home Page, in the Resources tree, right-click the *Domains* node, point to *New*, and then click *Enterprise Domain* or *Tenant Domain*, depending on which type of domain you want to create.

The New Domain dialog box opens.

3. Type the title of the domain in the Title field.

The Name field is filled automatically to match the value in the Title field. You can edit it.

4. Select the *Create Portal* check box, as shown in the following image.



Note: If you cannot create basic portals in your environment, the Create Portal check box is cleared and disabled, by default.

5. Click *OK*.

A message appears and confirms that the template processing is complete.

6. Click *OK*.

A new domain and a portal with the same name appear in the Resources tree.

7. To customize your new portal, under the Portals node, right-click the portal and click *Edit*.

The Portal Designer opens.

When you create a portal as part of a domain, it comes with the following pre-configured pages:

☐ Workbench

☐ My Page

The Workbench page can be used to work with domain content. It displays the Resources tree and report output area. When you run a content item, it appears in the report output area. Multiple content items appear as tabs.

My Page presents you with series of empty containers that you can fill with the content of your choice. You can maximize any of these containers to get a better view of your content.

For more information about domain templates, see the *WebFOCUS Security and Administration* technical content.

Procedure: How to Create a Collaborative Portal

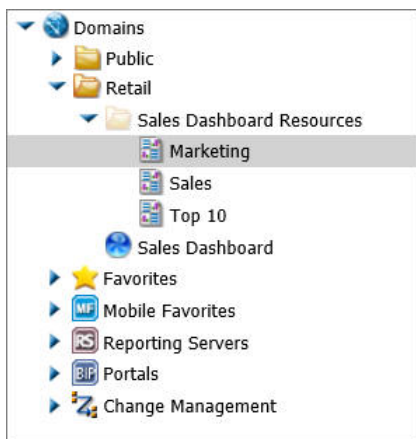
1. Sign in to WebFOCUS.
2. Select the domain or folder, where you want to create the collaborative portal.
 1. From the Legacy Home Page, point to *New*, and then click *Collaborative Portal*. The New Collaborative Portal dialog box opens.
 2. From the WebFOCUS Home Page, on the actions bar, click *Collaborative Portal*. The New Portal dialog box opens.
3. Supply the requested information on the dialog box, as follows.
 - ☐ **Title.** Value displayed in the tree that users use to identify the portal.
 - ☐ **Name.** Type a descriptive name for your portal. The name will be used throughout the WebFOCUS application.
 - ☐ **Path.** The path of the portal in the WebFOCUS repository.
 - ☐ **URL.** The URL is generated based on the portal name. Another user can enter this URL to access your portal without going to a home page.
4. Once you have completed the fields, click *Create*.

The portal is created for you, the Resources folder for the collaborative portal is added to the repository, and the Portal Designer opens.

Reference: Resources Folder

When you create a collaborative portal, a Resources folder with the same name is automatically generated. The Resources folder is used to store pages for each portal under the domain. The following image shows the Sales Dashboard Resources folder, which contains the pages for the Sales Dashboard portal, in the Resources tree of the

Legacy Home Page. If you are working from the new WebFOCUS Home Page, this folder is visible when you click the domain in the Explorer area.

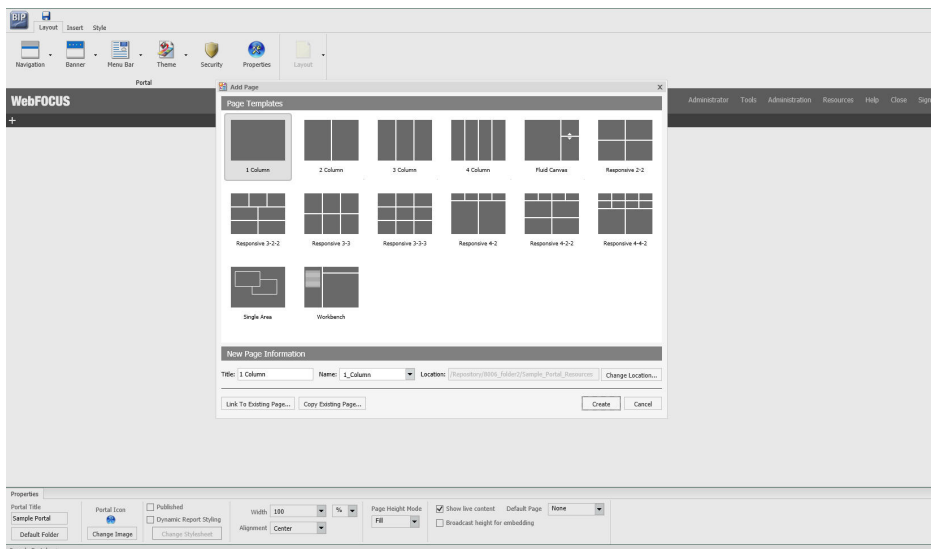


You can also reference pages in a portal from other locations.

Note: Do not delete the Resources folder for a portal that is in use. If you attempt to open a portal with a missing Resources folder, warnings will occur.

Portal Designer Interface

The following image shows the Portal Designer.



The Portal Designer has the following components:

- ☐ Page Templates
- ☐ Application menu
- ☐ Quick Access Toolbar
- ☐ Ribbon
- ☐ Canvas
- ☐ Properties panel
- ☐ Breadcrumb trail

These components are described in subsequent topics.

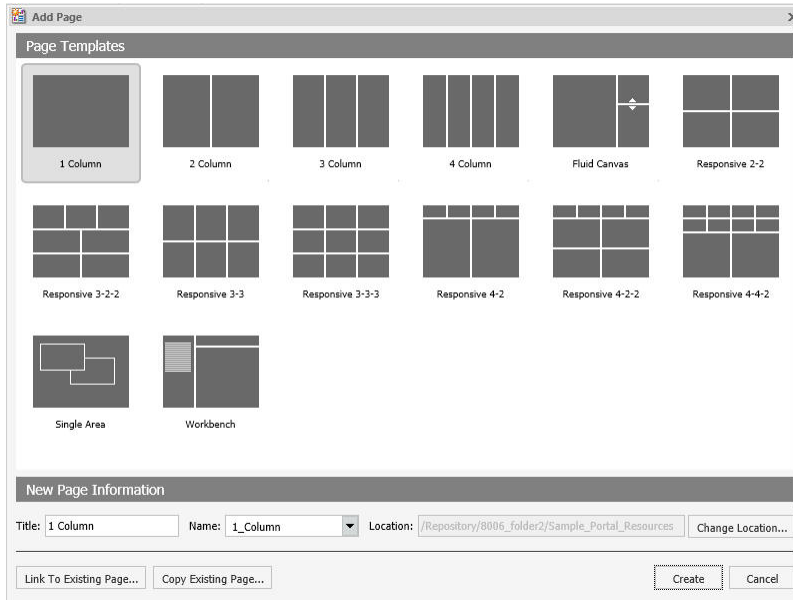
Note: The Portal Designer uses the Neutral theme, by default. You can change this to another theme of your choice from the Administration Console.

Page Templates

Page templates provide a quick way of creating page layouts. When you create a new collaborative portal or portal page, the Add Page dialog box opens and provides layout presets that you can choose from before adding any content. If you have custom templates, they are also shown in this dialog box.

Note: These page templates are only available when you create collaborative portals.

The Add Page dialog box is shown in the following image, and contains the following options:



☐ **Page Templates.** Contains custom and default page templates. Each template is accompanied by a thumbnail, which allows you to preview the layout. The default templates are:

- ☐ 1 Column
- ☐ 2 Column
- ☐ 3 Column
- ☐ 4 Column
- ☐ Fluid Canvas
- ☐ Responsive 2-2
- ☐ Responsive 3-2-2
- ☐ Responsive 3-3
- ☐ Responsive 3-3-3
- ☐ Responsive 4-2
- ☐ Responsive 4-2-2

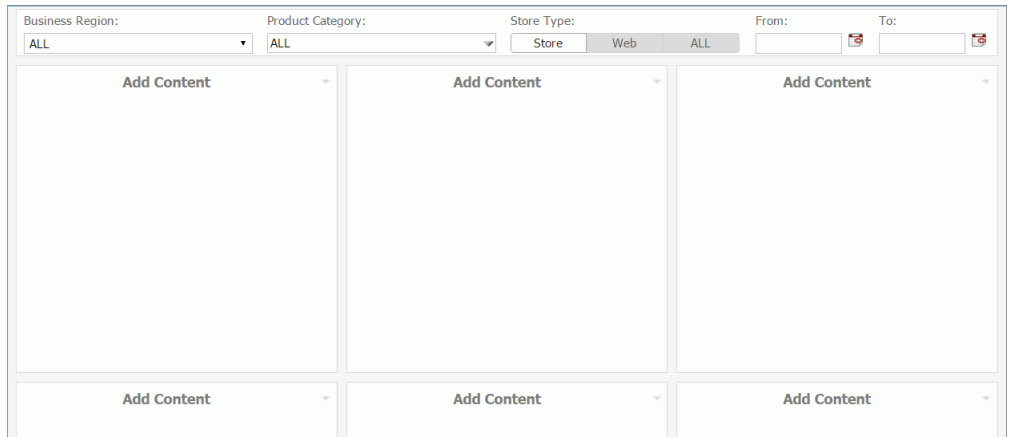
- ☐ Responsive 4-4-2
- ☐ Single Area
- ☐ Workbench
- ☐ **New Page Information.** Provides access to the following options:
 - ☐ **Title.** Identifies the title of the portal page. The default title matches the name of the selected page template.
 - ☐ **Name.** Identifies the name of the portal page. The default name matches the name of the selected page template.
 - ☐ **Location.** The location of the page in the repository. The default location is the Resources folder of the portal. To change the location, click *Change Location* and navigate to a different domain or folder.
- ☐ **Link to Existing Page.** Changes the location of the portal page in the repository. To change the location, click *Change Location* and navigate to a different domain or folder.
- ☐ **Copy Existing Page.** Creates a copy of an existing portal page in the repository, and adds it to a portal.

Procedure: How to Create a Custom Portal Page Template

Note: You can only create a custom portal page template from the Legacy Home Page.

1. Sign in to WebFOCUS as a developer or administrator.
2. On the Legacy Home Page, in the Resources tree, expand the *Global Resources* folder, and then expand the *Page Templates* folder.
3. Right-click the *Custom* folder, point to *New*, and then click *Portal Page*.
The Page Designer and Add Page opens.
4. Select a template that you want to use as a base for your custom template, update the Name field, and then click *Create*.
5. Modify your layout.

In this example, we used the Responsive_3-3 template and added a filter panel to it, as shown in the following image.



6. Click Save, and close the Page Designer.
7. In the Resources tree, right-click your newly created custom page template and click *Properties*.

The Properties window opens.

8. Locate the Properties value and make a note of the thumbnail image name, as shown in the following image.

Properties - Custom Dashboard

Main Properties

Title: Custom Dashboard

File Name: Responsive_3-3.page ☐ Change Name

Summary:

Parent Folder: IBFS:/WFC/Global/PageTemplates/Custom

Full Path: IBFS:/WFC/Global/PageTemplates/Custom/Responsive_3-3.page

Created On: Tuesday, March 28, 2017 4:39:38 PM EDT

Created By: admin

Last Modified On: Tuesday, March 28, 2017 5:00:49 PM EDT

Last Modified By: admin

Last Accessed On: Tuesday, March 28, 2017 5:00:49 PM EDT

Last Accessed By: admin

Properties: ImagePath=Resources/Responsive_3-3.png

Size: 0 bytes

Run: Immediate

Sort Order:

Status: Published

☐ Do not show on User's List
 ☐ Automatically Open
 ☐ Auto Create My Content Folders
☒ Prompt for Parameters
 ☐ Only Run as Deferred Report
 ☐ Use Title for Deferred Report D...
☐ Run With OLAP
 ☐ Schedule Only
 ☐ Restrict Schedule to Library O...
☐ Enable Auto Linking
 ☐ Auto Link Target
 ☐ Enable Auto Drill
☐ Allow user to Run
 ☐ Only allow user to Run

Security ▼

9. Create a custom thumbnail image, resize it to 96 x 72 pixels, and save it with the same name and file extension as the one in the custom template Properties value.
10. In the Resources tree, under the Page Templates folder, right-click the *Custom* folder, point to *New*, and then click *Folder*.

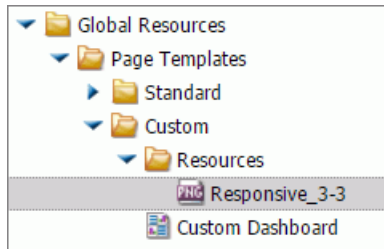
The New Folder dialog box opens.

11. In the Title field, type *Resources*, and click *OK*.
12. Right-click the folder that you just created, point to *Upload*, and then click *Image*.

The Image Upload dialog box opens.

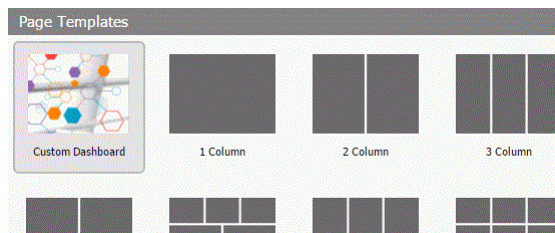
13. Upload your custom thumbnail image and exit the Image Upload dialog box.

The correct folder structure, under Global Resources, is shown in the following image.



14. In the Resources tree, under the Domains node, right-click a domain or folder, point to *New*, and then click *Page* or *Collaborative Portal*.

The Designer tool opens and Add Page dialog box opens with the new custom template added to the list, as shown in the following image.



15. With the Custom Template selected, click *Create*.

The custom template layout displays on the page.

Application Menu

You can access the Application menu through the BIP icon at the upper-left corner of the Portal Designer window.

The menu contains options to:

- ☐ Create a portal.
- ☐ Open an existing portal in the Portal Designer.
- ☐ Save the current portal.
- ☐ Save the current portal as specified. This option is only available for basic portals.
- ☐ Exit.

Quick Access Toolbar

The Quick Access Toolbar allows you to save your changes to the current portal.

Ribbon

In the Portal Designer, you can use the ribbon to access commands to edit your portals and add content. You can also hide the ribbon to maximize space or launch the online Help content.

The ribbon contains the following three tabs:

- ☐ **Layout.** Specifies the portal-level settings and the page and banner layouts.
- ☐ **Insert.** Inserts an item from a page to a report.
- ☐ **Style.** Applies styles to common properties such as, background, border, and font.

Layout Tab

The Layout tab for a collaborative portal contains two groups, Portal and Page & Banner. You can use the options in these groups to modify your portal.

Portal Group

The following topics describe the options that are available in the Portal group.

Navigation

You can expand the Choose a Navigation Layout option and choose among:

- ☐ **None.** Displays no navigation menu.
- ☐ **Top.** Positions the navigation menu beneath the banner, at the top of the window. This is the default layout.
- ☐ **Left.** Positions the navigation menu on the left side of the screen, in the left banner.
- ☐ **Right.** Positions the navigation menu on the right side of the screen, in the right banner.

Banner

A banner is an area that is visible in the portal no matter what page you view. You can choose to have no banner or any combination of top, bottom, left, and right banners.

You can expand the Choose Banner Areas option and choose among:

- ☐ **Top.** Positions the banner at the top of the window. This is the default area.

- ☐ **Bottom.** Positions the banner at the bottom of the window.
- ☐ **Left.** Positions the banner at the left of the window.
- ☐ **Right.** Positions the banner at the right of the window.

Click each menu option to turn the associated banner on or off.

Menu Bar

The Menu Bar button allows you to use a visual interface to change the location of the links. You can choose from three main locations:

- ☐ **Top Bar.** Displays the links above the top banner.
- ☐ **Top Banner.** Displays the links within the top banner. This is the default location, with a right alignment of the links.
- ☐ **Bottom Bar.** Displays the links below the bottom banner.

The bar options are thin strips, either at the top or bottom of the window. They are always visible, no matter how far down or up you scroll.

In each of the locations, you can choose alignment options. For example, you can align the links to the left, in the center, or to the right.

Theme

Theme launches a menu from which you can customize the theme of your portal. This includes the following:

- ☐ **Portal Theme Files Browser.** Configures CSS files, by applying a predefined theme. You can also create a custom theme. The default theme is Neutral.
- ☐ **CSS Editor.** Enables you to edit specific components of the existing CSS theme.

Security

The Security button launches the Security Rules dialog box, where you can specify an audience for the portal and add other designers.

There are four permission sets for portals:

- ☐ **BIPCreatePortal.** Allows you to create a portal.
- ☐ **BIPFullControl.** Gives you design access and personalization features on a portal.
- ☐ **BIPViewAndCustomize.** Provides access to run-time mode only. It saves the position of any content that you rearrange and lets you add new content to your copy of the portal.

- ☐ **BIPViewOnly.** Does not save anything that you do in run-time mode. One use for this operation is anonymous access.

Properties

The Properties button makes the current portal the selected object. It also sets the Properties panel at the bottom of the Portal Designer window so that it applies to the current portal.

Page & Banner Group

The Page & Banner group has a single Layout option that launches a menu from which you can customize the layout of your canvas or portal. For example, you can choose between a column-based layout or to a fluid layout. In a column-based layout, dragging a panel results in a drop indicator, showing where the panel goes. In a fluid layout, the content automatically fills the page area in equal proportions. You can manually rearrange and nest these elements on the page. The display area changes its size depending on your browser dimensions.

The Page & Banner Group includes the following options:

- ☐ **Single Area.** Creates a free-flowing area, where there is no grid. This is the default.
- ☐ **Fluid Canvas.** Arranges content evenly, and redistributes space as more items are added.
- ☐ **One Column.** Stretches content to fill the entire page area.
Note: This layout is always used to create a responsive portal page. For more information, see [Building a Basic Responsive Portal](#) on page 139.
- ☐ **Two Columns.** Divides the page evenly into two columns.
- ☐ **Three Columns.** Divides the page evenly into three columns.
- ☐ **Four Columns.** Divides the page evenly into four columns.

When you select any option other than Single Area, any items that you add to the page automatically snap to place in the layout.

Insert Tab

You can use the Insert tab to add containers or content to your portal.

The Insert tab the following:

- ☐ **Pages.** Adds a new portal page to the portal.
- ☐ **Containers.** Adds a panel, accordion, tabbed, responsive, or easy selector container.

- ❑ **Content.** Inserts content, for example, reports, charts, visualizations, documents, and URLs. You can also add images, a Resources tree, a Portal List, and text.

Style Tab

You can use the Style tab to configure the styling of objects, options for the background and borders, as well as fonts and colors of the text.

The Style tab contains the following groups:

- ❑ State
- ❑ Background
- ❑ Border
- ❑ Font

State

From the State group, you select which of the available states you are styling for an object. The state options include the following:

- ❑ **Normal.** This is the default state of an object in which an event, such as a hover, is not occurring, or if styling for that event is not defined.
- ❑ **Active.** This is the state in which the object is currently in use. An example is the background color of the current page tab.
- ❑ **Hover.** This is the state in which the mouse cursor is resting on the object.

Background

You can use an image, a color, or a combination of options when styling the background of an object.

Image

The Image button is a split button. When you click *Image*, the Open dialog box appears, and you can select an image from your repository. When you click the menu, the Background Image Options open. Here, you can change or remove the image.

Click *Change Image* to launch the Open dialog box. From this dialog box, select an existing image in the repository to use as the background, and click *Open*.

To add a new image, use the Resources tree, and right-click the folder that you wish to place the new image in. Point to *Upload* and click *Image*.

Note: The background image is not visible when the Width option is set to *Responsive*.

Repeat

You can use the Select Background Repeat menu to choose whether or not to repeat the background. The options in this menu include the following:


- ☐ **None.** Displays the background image only once.
- ☐ **Everywhere.** Repeats the background image horizontally and vertically. This is the default value.
- ☐ **Horizontally.** Repeats the background image horizontally.
- ☐ **Vertically.** Repeats the background image vertically.

Position


You can select a background position using a visual menu if you do not choose to repeat the image on the page. For example, you can position the background image at the bottom of the window, on the right. This feature is similar to Menu Bar positioning.

The default background position is upper-left.

Background Color

The Background Color icon  launches the color selection dialog box for setting a page background color. The same icon is used in the Border and Font groups to set the border and font colors, respectively.

Reset Background

The Reset Background icon  in the Background group resets the background styling to the theme settings for the currently selected state. The same icon is used in the Border and Font groups to reset those groups.

Border

In addition to color and reset, the Border group has style and width controls.


Style

When you click the Style menu, the Select Border Style menu opens. From this menu, you can choose from nine border styles. This includes None, solid border, dotted border, dashed border, groove border, and more. As you hover over each option, the canvas refreshes with a preview to show the border style.


Width

You can use the Width controls to set the border thickness in pixels (px). If the style is set to none, which is the default for most objects, the Width control has no effect.

Color

The Border Color icon  launches the color selection dialog box for setting the Border color.

Reset Border


The Reset Border icon  in the Border group resets the border styling to the theme settings for the currently selected state.

Font


You can use the Font group to choose the Font family, modify the size of the font, and apply bold, italic, or underlined formatting.

In addition, the Font group contains:

Color

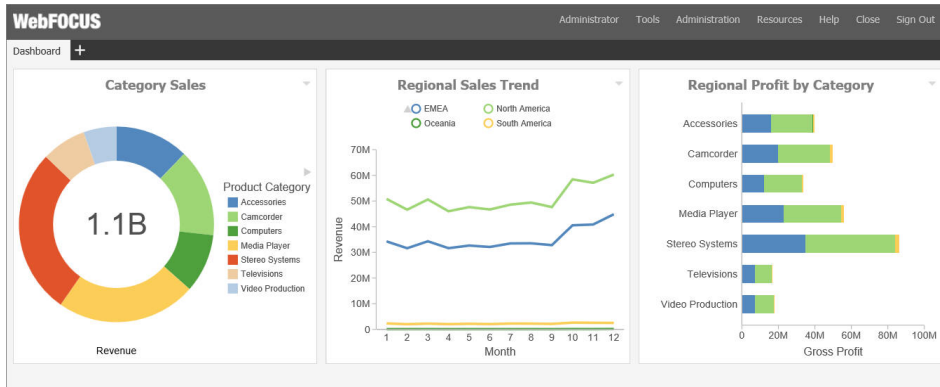
The Font Color icon  launches the color selection dialog box for setting the font color.

Reset Font

The Reset Font icon  in the Font group resets the font styling to the theme settings for the currently selected state.

Canvas

The following image shows the canvas of the Portal Designer.



The canvas is the design area, including the banners and pages of your portal. When the portal itself is the selected object, a red outline appears around the entire canvas.

Properties Panel

The Properties panel appears near the bottom of the window, below the canvas. It contains the properties that apply specifically to the currently selected item.

Breadcrumb Trail

The breadcrumb trail appears at the bottom of the window. It serves two purposes:

- ☐ It indicates the currently selected item.
- ☐ You can use it to change the currently selected item.

Click any portion of the breadcrumb trail to change the currently selected item. This feature is another way to select an item, in addition to selecting it through the canvas. This feature is especially useful when you are working with hidden or layered content.

Portal Components

A portal is made up of different components, such as a Menu Bar, navigation area, and banner. This topic describes the different components of a portal and their properties.

Portal

The Portal, while not a component itself, does have properties that you can set.

The properties are:

- ☐ **Portal Title.** This is a unique name that is used to describe the portal throughout WebFOCUS.
- ☐ **Portal Icon**
 - ☐ This is an icon displayed to the left of the portal name throughout WebFOCUS. For example, it appears in the Resources tree.
 - ☐ The maximum display size of the icon is 16 x 16 pixels. Upload an image that is visible at that size.
 - ☐ Change the portal icon by clicking the preview icon or the *Change Image* button.
- ☐ **Published.** This check box determines whether or not the portal is ready for others to use. When this box is checked, the portal is live for anyone who has been given access to it.
- ☐ **Dynamic Report Styling.** When this property is enabled, all reports that run within the portal inherit their styling from the portal. Each portal theme has a default WebFOCUS StyleSheet (.sty file). You can choose from any of the StyleSheets, as well as create and apply your own.
- ☐ **Width.** This is the width of the portal. You can set it as default, auto, responsive, or specify a percentage or number of pixels. By default, the width is set to 100%.
- ☐ **Alignment.** When the width is not 100%, you can choose how to align the content (left, center, or right). Center is the default alignment.
- ☐ **Page Height Mode.** You can choose from one of two different page height modes.
 - ☐ **Fill (default).** The page takes up 100% of the viewable space in your browser. If there is more content than can fit in that space, the page area will scroll, but the top and bottom banner (if enabled) will always be visible. Use this when you want to make the complete site, including the banners, visible.
 - ☐ **Auto.** The page height is set to that of the page content. In this mode, the banners scroll with the page content. Use this feature when you want pages to grow as the user adds content.
- ☐ **Summary.** This is an optional explanation of the portal. It is displayed in the tooltip of the portal tree when the mouse hovers over a portal.
- ☐ **Show live content.** This check box allows content to change in real time.
- ☐ **Broadcast height for embedding.** Enables a third-party web application to embed the portal content and display it correctly within a responsive layout.

- ☐ **Default Page.** Selects the page that the users see upon their login to the portal.

Note: If set to *None*, all users, upon their first login to the portal, see the page that was viewed by the Designer at the moment of saving a portal. Upon subsequent logins, users with portal customization privileges will see the last page that they viewed at run time. This behavior is especially useful when you need to show a specific page to users once, for example a disclaimer or a tutorial.

Menu Bar

The Menu Bar is the collection of links found either in the top banner, or in the top or bottom bar.

The Menu Bar has the following properties:

- ☐ **Location.** Works just like the Menu Bar button on the ribbon.
- ☐ **Margins.** Used to fine-tune the Menu Bar position. You can adjust the Menu Bar horizontally (left or right) or vertically (top or bottom). The labels and choice of units (pixel or percentage) vary, based on the starting position. The vertical option is disabled when the Menu Bar is in the top or bottom bar. The vertical and horizontal options are disabled when the location is middle and center, respectively.
- ☐ **Separator.** Color of the vertical bar between items.
- ☐ **Items.** List of available and selected options.
- ☐ **Max Items.** Maximum number of items to show in the Menu Bar. Any additional items become the sub-items of an option labeled *More*.
- ☐ **Theme.** The *Theme* button and check box become active when you add *Theme* from the Available list to the Selected list, and allows you to select the themes that will be in the Menu Bar drop-down list.
- ☐ **Refresh content on theme change.** If enabled, refreshes all content items on the page to reflect a new theme.

Navigation

The Navigation area is located on top of pages. The properties panel for this component lets you choose if the Style tab is styling the Buttons or the Area (non-button space in the Navigation section).

Additionally, the following are the properties of the navigation area:

- ☐ **Hide New Page.** Removes the option to create a new page at run time, when it is selected.
- ☐ **Hide Link to Page.** Removes the option to add a linked page at run time, when it is selected.

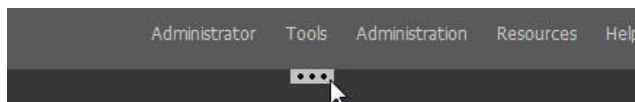
Note: If the Hide New Page option is enabled and the Hide Link to Page option is disabled, the run-time New Page button opens the Open dialog box, where you can link to an existing page. If the Hide Link to Page option is enabled and the Hide New Page option is disabled, the run-time New Page button opens the Add Page dialog box. The Link to Page button is not displayed in the Add Page dialog box. If both Hide New Page and Hide Link to Page options are enabled, the New Page icon is not displayed in the navigation area at run time.

Banners

Banners are areas that are visible above the pages of the portal.

The following are the properties of a banner.

- ☐ **Height.** Set in pixels or as a percentage.
- ☐ **Lock Banner.** Turns off customization of the banner. Customization includes changing the height and visibility settings.
- ☐ **Collapsible.** Allows optional visibility at run time. If this check box is selected, the banner becomes collapsible, allowing you to expand the display area of the portal. To hide or reveal a banner at run time, click the collapsible banner indicator, as shown in the following image.



Portal Pages

Portal pages are the main content area of a portal. The default page, when a user loads the portal, is the portal page that was visible in the Portal Designer when you last saved the portal. You can rearrange portal pages using a drag-and-drop operation.

The page title has a shortcut menu that can be used to rename, rearrange, change the page layout, delete the page, add a new page, or access hidden content on the page. Right-clicking the page itself displays the Page Layout and Hidden Content option.

The following are the properties of a page.

- ☐ **Title.** Identifies the title or label shown in the navigation menu and any tree that lists pages in a portal.

- ☐ **Page Icon.** Works just like the portal icon, except that you can turn it on or off. It is disabled, by default.

Note: You can upload a custom image of any size for a portal page icon. Larger images can be used for side navigation on the Legacy Home Page and as buttons on mobile devices. Changing the portal page icon in the Properties tab of the Portal Page Designer does not change the default icon that displays on the WebFOCUS Home Page.

- ☐ **Change Image.** Allows you to select a different image for the icon.

- ☐ **Lock Page.** Turns off customization on the portal page. Customization includes moving content and adding content.

Note: The Lock Page check box is selected by default. Clear it to grant permission to end users for moving and adding content.

- ☐ **Refresh on Click.** Refreshes the portal page when you click the page title. This feature is useful if another portal page changes the parameters used by the reports on this page. When you switch back, the reports rerun with the appropriate parameters.

- ☐ **Show in Navigation.** Used to hide the portal page from the navigation. You can use this property to create a home page for a portal that displays the first time that a user runs the portal, but the user cannot navigate to it again.

- ☐ **Prevent Layout Change.** Restricts layout changes on unlocked portal pages at run time. This option is only active when the Lock Page option is disabled.

Note: In a collaborative portal, this behavior varies depending on the template that you choose. For the columnar layouts, Fluid Canvas, and Single Area, the Prevent Layout Change check box is clear by default. This gives users the freedom to switch between these layouts at run time. For all responsive layouts, the Prevent Layout Change check box is selected, by default, to prevent users from breaking the template and impairing the responsive function.

- ☐ **Relative Path.** References a specific path for the content that was added to a portal page and allows you to move the page or the portal in the repository without losing any content or resources. This option is only available for collaborative portals.

- ☐ **Show Refresh.** If enabled, displays the Refresh option in the portal page menu at run time.

- ☐ **Margins.** Sets page margins in pixels or as a percentage. Use the Same for All option to set equal margins on all four edges of a portal page.
- ☐ **Comments.** Controls the placement of the comments on a portal page. The options include: none, top, bottom, left, and right. This option is only available for collaborative portals.
- ☐ **Container Defaults.** Opens the Container Defaults dialog box, where you can set a default size, appearance, and list of behaviors for all containers on a portal page.
- ☐ **Summary.** Appears in a tooltip when you are exploring the portal in a tree. Applies to the portal page.
- ☐ **Page Name.** Sets a descriptive name of your portal page. The name is used throughout the WebFOCUS application.

Columns


Columns can be found in both banners and portal pages. Columns have the following properties:

- ☐ **Column Number.** A label that indicates the column that is selected on the portal page.
- ☐ **Width.** Set in pixels or as a percentage.
- ☐ **Lock Width.** Prevents a designated column width from being changed at run time. This option is only active if the column width is set in pixels or as a percentage. It is disabled when the column width is set to Auto.
- ☐ **Container Padding.** The space between either container and the column edge (left and right of each container, the top of the first container, and the bottom of the last container) or each other (vertical space between each container). These work like page margins, but are set only in pixels.
- ☐ **Freeze Column.** Prevents users from adding content to the column or any of the containers inside this column at run time. It also prevents users from removing any content or containers from this column at run time. This option is not available when the Lock Page option is selected.
- ☐ **Show Easy Selector.** Activates the Easy Selector function at run time.
- ☐ **Select Folder.** Opens the Browse For Folder dialog box, where you can select a folder that is available from the Easy Selector option at run time.

Logo

The Logo is found in the top banner of the portal. By default, a WebFOCUS logo appears. You can replace it with your own logo or remove it completely.

A logo has the following properties:

- ☐ **Reset.** Click the reset  icon to reset the logo.
- ☐ **Show Logo.** Clear the check box to hide the logo.
- ☐ **Change Image.** Click *Change Image* to select your own logo.
- ☐ **Logo Size.** Set the logo size in pixels or as a percentage. Click the lock icon to lock the aspect ratio (changing the width changes the height proportionately and vice versa).
- ☐ **Location.** Position the logo in the top banner. This feature works just like the background positioning on the Style tab.
- ☐ **Margins.** Used to fine-tune the image location. Works just like the Menu Bar margins.

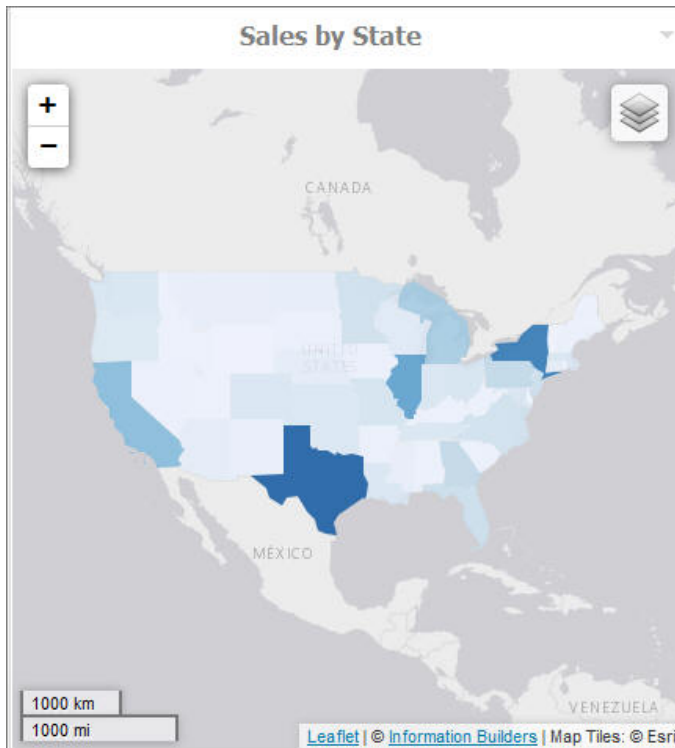
Containers

There are five types of containers. They are:

- ☐ **Panel.** A simple container that can hold a single piece of content.
- ☐ **Accordion.** A compound container that can hold one or more pieces of content. It uses accordion panes to switch between the content.
- ☐ **Tabbed.** Similar to the accordion, but uses tabs to switch between the content.
- ☐ **Responsive.** A compound container that responds to the layout changes based on the size of the browser or device.
- ☐ **Easy Selector.** A simple container that a flexible way of adding content to a portal at run time without opening the Resources tree.

Panels

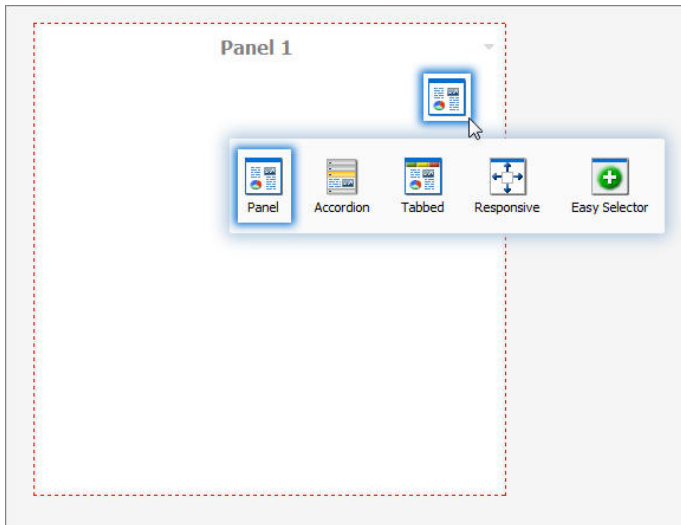
The panel container holds a single piece of content, as shown in the following image.



The panel consists of three sections:

- ☐ Overall panel
- ☐ Title Bar
- ☐ Content Area

If you hover over a panel, the Change Panel Type button appears, as shown in the following image.



This button opens a menu, where you can select a different type of panel.

Note: When adding pages created in the WebFOCUS Designer, the Change Panel Type button opens over the Refresh and Filter options for the page. However, when you run the portal or portal page, these options are accessible.

To change the title of the panel, right-click the title bar and click *Change Title*, as shown in the following image.



Panel Properties

The properties for all panel types are:

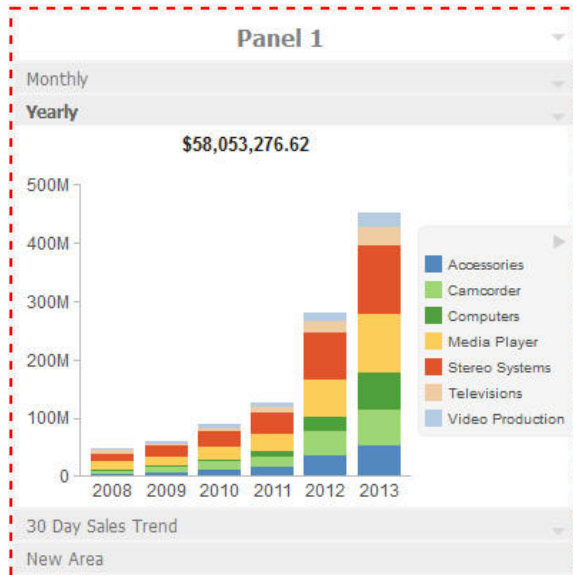
- ❑ **Properties Tab.** Contains the properties that apply to the panel.
 - ❑ **Size.** In a single area layout, this is both height and width in pixels. In column-based layouts, this is height only. You can set the height, in pixels, to Auto, Dynamic, or a numeric value. The Dynamic height option is only available when you use a responsive container.

- ☐ **Responsive Properties.** Opens the Responsive Panel Properties dialog box, where you can edit the layout of the responsive container.
- ☐ **Behaviors.** You can configure how the panel behaves. By default, all options are on. The options that require a menu click are available by hovering over the title bar and accessing the menu at the upper-right (in accordion and tabbed containers, each area has a menu as well). The options are:
 - ☐ **Move.** If selected, allows you to move a panel on a page at run time.
 - ☐ **Resize.** If selected, allows you to resize a panel at run time.
 - ☐ **Minimize.** Adds the Minimize option to the panel drop-down menu.
 - ☐ **Maximize.** Adds the Maximize option to the panel drop-down menu.
 - ☐ **Refresh.** Adds the Refresh option to the panel drop-down menu.
 - ☐ **Hide.** Adds the Hide option to the panel drop-down menu.
 - ☐ **Delete.** Adds the Delete option to the panel drop-down menu. When a user deletes a panel, they delete it only from their version.
 - ☐ **Show Comments.** Displays comments on a panel, and adds the Show/Hide Comments option to the panel drop-down menu, if selected. This option is only available for collaborative portals.
- ☐ **Appearance.** You can control the following options:
 - ☐ **Hide Panel.** When this option is selected, the panel is not initially visible. The user can add it by clicking *Hidden Content* in the page shortcut menu or the Menu Bar. You can use the Hidden Content feature to give the user a choice of widgets to view on their page.
 - ☐ **Freeze Container.** Prevents users from adding content to and removing content from the container at run time. This option also restricts any interaction with the container at run time except minimizing, maximizing, and restoring the panel to its original size. This option is not available when the Lock Page option is selected.
 - ☐ **Show Easy Selector.** Activates the Easy Selector function at run time.
 - ☐ **Select Folder.** Opens the Browse For Folder dialog box, where you can select a folder that is available from the Easy Selector option at run time.

- ☐ **Title Tab.** Contains the properties that apply to the title bar of the panel.
 - ☐ **Title.** This is the text displayed in the title bar. When you add content, it automatically changes to the current title of that content. You can edit this field to override the automatic change.
 - ☐ **Panel Icons.** Works just like the portal and page icon, except that you can turn it on or off. It is disabled by default.
 - ☐ **Change Image.** Allows you to select a different image for the icon.
 - ☐ **Appearance.** You can control the following options:
 - ☐ ☐ **Hide Title Bar.** You can hide the title bar to save space. This feature is very useful when you have only a single piece of content on a portal page.
 - ☐ ☐ **Show Menu Icons.** Determines whether the icons that display with the options in a container shortcut menu are visible.
- ☐ **Content Tab.** Contains the properties for a content item that is displayed inside the panel.
 - ☐ **Content Area.** The properties for the Content Area differ based on the type of content. A blank panel has a blank properties panel.
 - ☐ **Auto Refresh.** If enabled, refreshes the content automatically. This property is off by default. When it is enabled, the default time is 30 seconds.
 - ☐ **Dynamic Report Styling.** When Dynamic Report Styling is enabled at the portal level, this box is checked for a piece of content by default. To disable Dynamic Report Styling for a specific piece of content, clear this option.
- ☐ **Tabs/Areas Tab.** Contains the properties that apply to tabs and areas. This tab is only visible in the properties panel of a tabbed or accordion container. Here you can style different areas of the container by selecting *Buttons* or *Bar*. You can also hide the new tab button from a tabbed container, or the new area button from an accordion container, to restrict adding more tabs and areas to this container at run time.

Accordion Container

The accordion container can hold more than one piece of content, as shown in the following image.



In the preceding image, notice how the chart fits perfectly in the container. WebFOCUS InfoAssist has an option to AutoFit charts. When enabled, it accepts the sizing from the portal. This prevents the person who develops the chart and the person who uses it from having to coordinate sizing. Additionally, you can easily resize the container and see the entire chart.

The title bar and content area properties are the same. The overall properties have an additional section labeled Area.

In the Area section, you can use the icons in the order in which they appear to add, rename, delete, and reorder the areas. You can also create a new area using the New Area bar in the container or delete containers using the menus. You must use the Properties panel to rename or reorder the areas.

Note: When you click the New Area bar multiple times to add new areas, you may need to resize the container to view the bar, as it could be covered by newly created areas.

There is also an additional Properties panel, the Pane Title Bars, which is accessible only through the breadcrumb trail. This feature lets you style the title bars of the areas. They are all styled together, but you can style the different states to distinguish the currently active one from the one on which the mouse pointer is resting.

Tabbed Container

The tabbed container can hold more than one piece of content, as shown in the following image.

Panel 1

30 Day Sales TrendSales By ProductStoresCustomersNew Tab

Subcategory	Gross Profit	Discount	MSRP	COGS	Qty
Blu Ray	\$51,771,195	\$10,895,633	243,779,705	\$181,112,921	679,495
Speaker Kits	\$25,819,242	\$4,954,243	112,169,618	\$81,396,140	244,199
Headphones	\$24,523,024	\$3,516,913	79,703,501	\$51,663,564	228,349
Handheld	\$21,393,655	\$1,959,624	43,930,192	\$20,576,916	250,167
Standard	\$19,369,668	\$3,214,787	71,656,083	\$49,071,633	192,205
Video Editing	\$17,947,620	\$2,695,891	60,749,162	\$40,105,657	199,749
Tablet	\$17,674,116	\$2,018,135	45,464,132	\$25,771,890	146,728
Receivers	\$16,555,836	\$2,643,045	59,528,536	\$40,329,668	150,568
Flat Panel TV	\$15,885,499	\$3,478,829	78,441,670	\$59,077,345	92,501
Smartphone	\$15,834,702	\$2,790,776	62,661,241	\$44,035,774	205,049

The tabbed container has all the same properties as the accordion container. Instead of the Pane Title Bars properties, it has a property panel called Tab Bar. You can access this property panel by clicking it.

Unlike the Pane Title Bars, it is not blank. You can choose to style the buttons or the bar. This feature is similar to styling the Navigation buttons versus the Navigation area.

Responsive Container

The responsive container is designed to help you build a responsive portal that automatically adapts to different screen sizes and mobile devices, providing an optimal viewing experience for users everywhere. You can build your responsive portal on your desktop, and make it available to users on different platforms. The following image shows an example of a responsive portal displayed on a desktop, tablet, and smartphone.



The responsive container intuitively changes its layout when you change the size of your browser. The default width and height of the container, and the inserted items, are pre-configured to offer the best positioning of the elements on the screen. You can manually change the dimensions of the items in the Responsive Item Properties dialog box. You can also change the layout options in the Responsive Panel Properties dialog box.

Responsive Item Properties

The Responsive Item Properties dialog box provides options to change the dimensions of an individual item within the responsive container. You can access the Advanced Responsive Item Properties dialog box at design time by clicking the *Responsive Properties* button in the property sheet.

The properties for a responsive item are:

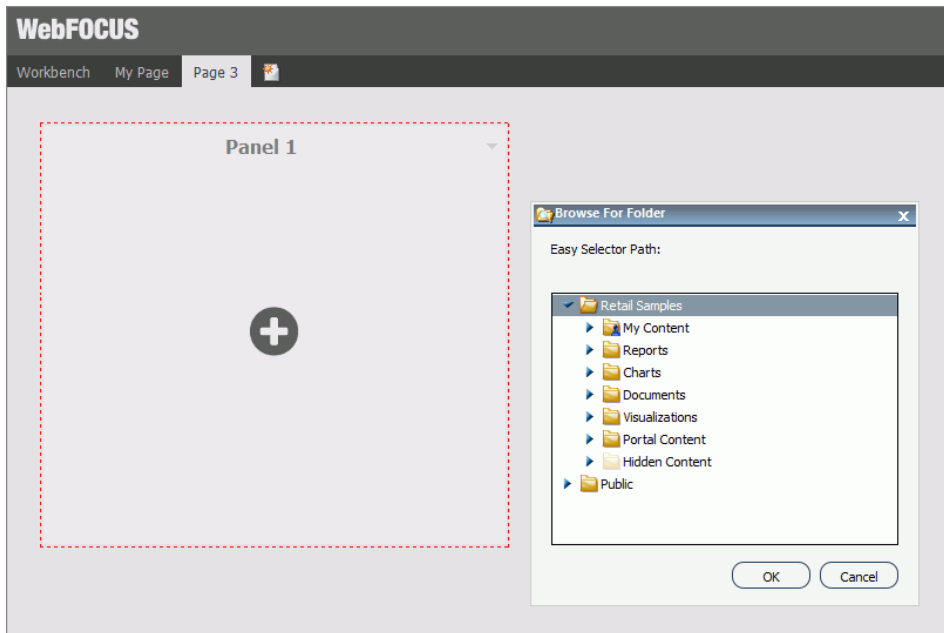
- ☐ **Custom CSS Classes.** Enables custom CSS classes for the item.

- ☐ **Width.** Defines the width of the item.
- ☐ **Height.** Defines the height of the item.
- ☐ **Margin.** Defines the space between the adjacent items.
- ☐ **Shrink.** Defines the ability of the item to shrink if necessary.
- ☐ **Grow.** Defines the ability of the item to grow if necessary.
- ☐ **Basis.** Specifies the initial size of the item, before any available space is distributed according to the responsive factors.
- ☐ **Minimum Width.** Sets the minimum width of the specified element. This setting overrides the Width setting.
- ☐ **Maximum Width.** Sets the maximum width of the specified item. This setting overrides the Width setting.
- ☐ **Minimum Height.** Sets the minimum height of the specified item. This setting overrides the Height setting.
- ☐ **Maximum Height.** Sets the maximum height of the specified item. This setting overrides the Height setting.
- ☐ **Self Align.** Provides access to the following options:
 - ☐ **Auto.** Intuitively places the item in the best available space inside the responsive container.
 - ☐ **Start.** Aligns the item to the left side of the responsive container.
 - ☐ **End.** Aligns the item to the right side of the responsive container.
 - ☐ **Center.** Aligns the item to in the center of the responsive container.
 - ☐ **Stretch.** Stretches the item to fill the available space inside the responsive container, while respecting width and height constraints.
 - ☐ **Baseline (text).** Aligns the baseline of text inside the responsive container.

Note: In a responsive portal, setting fixed dimensions for items is not recommended, because the viewport width and height continually change from device to device. Responsive layouts need to adapt to this change, whereas fixed dimensions create too many constraints. For this reason, you must only set a range between minimum and maximum width and height, defining an amplitude with which the item can vary in size.

Easy Selector Container

The easy selector container provides a simple way to add content to a portal at run time, without opening the Resources tree. It also gives you the option to control which items users can access. When you insert an easy selector container into a page at design time, the Browse For Folders dialog box opens, as shown in the following image. Here, you can select a folder that users can access at run time.



To change a target folder, click the *Change Folder* button in the Properties panel.

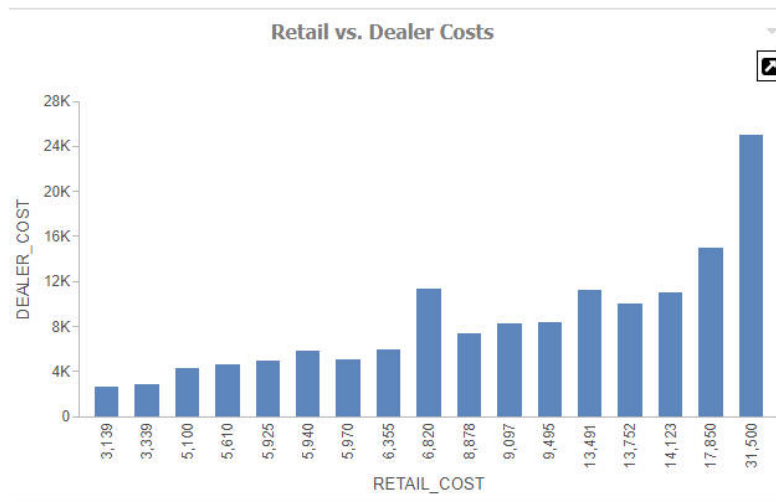
Content

You can add content to a portal in a few ways. The first way is to use the ribbon. Navigate to the Insert tab and choose a type of content in the Content group. The second way is to insert a blank panel, area, or tab, and use the WebFOCUS Resources option to populate it. The Resources tree opens, allowing you to drag content into the portal.

Note: When you click and drag one or multiple resources or folders from a tree to a blank page, a tabbed container is created, showing each resource. For more information, see [Tabbed Container](#) on page 117.

The other four options (Image, Resource Tree, Portal List, and Text) place their content in the content area that is selected, if applicable. Alternatively, they create a new panel with the content in the current page or banner that you are on.

When you add Insight-enabled content to a portal page, it will run as a standard HTML5 chart. An Explore with Insight icon displays, as highlighted in the following image.



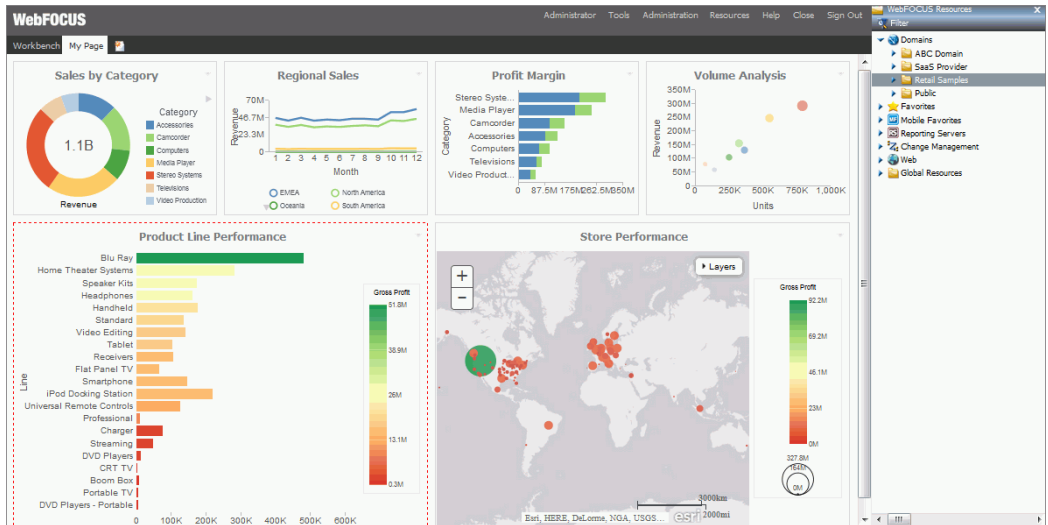
You can view the content in Insight mode by clicking the Explore with Insight icon. Content opens in a new browser tab.

WebFOCUS Resources

The WebFOCUS Resource option opens the Resources tree on the right-hand side of the window. The tree shows you the content stored in the WebFOCUS Repository. You can access this content in the Content section of the tree. Alternatively, you can find a resource that you marked as a Favorite or Mobile Favorite.

Depending on security, you may also have access to the Reporting Servers section to manage metadata. You cannot insert a report that is stored on the Reporting Server into a portal.

The Resources tree is docked on the right. When it is docked, you can keep it open, close it, or unpin it so that it collapses to the side. The Resources tree is shown in the following image.



URLs

A URL is a link to a website. To create one, right-click a folder in the Content section of the tree, point to **New**, and click **URL**. In the Create URL dialog box that opens, type a display title, a file name, and the URL itself. Optionally, you can provide a summary that is displayed in a tooltip when the mouse pointer rests on the URL in the tree.

If you insert a URL inside the portal, be aware that some sites may not work, as their owners may not allow them to run inside a frame. Internet Explorer will show a message. Firefox® and Chrome™ browsers display just a blank frame.

Resources Tree

You can insert a Resources tree to allow users to perform activities such as run content, create content, and schedule content. In addition to the tree nodes shown in the pop-out tree, you can also choose to show a node named **Portals**, which lists all the portals that the user can access.

Note: If you place a Resources tree into a column (which is a percentage of the whole horizontal size), it cannot be resized.

Click the **Filter** button to access the Filter option. The Filter feature is not a search feature. To access search, right-click the **Domains** node or any folder in it, and click **Search**. As you browse through the tree, the filter returns only items that meet the filter criteria.

Note: Folders published from the WebFOCUS Portal Designer or Portal Page Designer display as published in the WebFOCUS Resources panel, but display as private in the Resources tree on the Legacy Home Page. Refresh folders in the Resources tree to display them as published.

When the Resources tree is placed inside a panel, the following properties display in the Properties panel, in the Content tab:

☐ Resources tree

From the following list, choose which sections of the tree to show:

☐ Filter

☐ Content

☐ Favorites

☐ Mobile Favorites

☐ Reporting Server

☐ Portals

☐ Change Management

By default, all sections are enabled. The enabled sections appear for any user that has security access to those sections. A portal designer can deny access to a section by hiding it, even from a user who has access, but a designer cannot grant access to a user who does not have access.

☐ **Hide Scrollbar.** When selected, this option removes the horizontal scrollbar from the Resources tree. This feature improves usability of the component at run time and on mobile devices.

☐ **Run Location.** You can choose to run content in a window or in a panel in the portal. Reporting Server content always runs in a new window.

When the first option is set to *Window*, there is a second option named *Window*, giving you the ability to choose a New Window or name the window in which to run.

When the first option is set to *Panel*, you can choose to create a new panel, accordion, or tabbed container, as well as choose from one of the existing content areas on the page. In the case of an existing accordion or tabbed container, choosing the title of the container itself creates a new area or tab in that container. Choosing an existing area replaces that area.

Note: If the Freeze Container option is selected on the target panel, the content will still run, but all additional changes to that panel will be restricted.

Portal List

To create a portal listing, either insert a Resources tree and show only the Portals section, or insert a Portal List. The difference is that in a Resources tree, the shortcut menu options are available for each portal and for the Portals node, while in a Portal List they are not available. Also, in the Resources tree the Portals section is not expanded, by default, while in a Portal List, it is expanded.

The Portal List has properties that display in the Content tab of the Properties panel, such as:

- ☐ **Portal List.** Allows you to change the name of the panel, in which the Portal List is displayed.
- ☐ **Hide Scrollbar.** Removes the horizontal scrollbar from the Resources tree, when selected. This feature improves usability of the component at run time and on mobile devices.

Text

The last type of content is text. The text area is simple to use. All styling is applied to all the text. You cannot style individual words or characters.

The text area has no properties other than the content type and the Area ID.

Customizing and Running Portals

After creating a portal, you can customize and rearrange portal pages, configure responsive behavior or the Easy Selector, translate content, and more. This topic provides information about customizing and interacting with a portal.

In this chapter:

- ☐ [Running a Portal](#)
 - ☐ [Working With Portal Pages](#)
 - ☐ [Removing Customizations](#)
 - ☐ [Using the Easy Selector](#)
 - ☐ [Building a Basic Responsive Portal](#)
 - ☐ [External CSS Theme Support](#)
 - ☐ [Working With Comments](#)
 - ☐ [Localizing Portals](#)
 - ☐ [Creating a Custom Sign-in Page](#)
-

Running a Portal

When users run a portal, they have either view-only access or the ability to customize a portal and its content. If they have the ability to customize, all actions are saved as they are performed unless a portal page is locked. For example, any time they move content around, the new positions of the content are saved. Any content added, hidden, or removed is saved as well.

New portal pages are saved, too. If the Portal Designer adds or removes portal pages or content, the user sees this, along with their customization each time that they load the portal. They lose their customization only if a portal page that they have customized is deleted by the Portal Designer or if they use the Remove My Customizations option. To learn more about removing customizations, see [Removing Customizations](#) on page 134.

When working with a collaborative portal, users can create an alias and run a portal from a specific URL. This feature prevents collaborative portal URLs from becoming unnecessarily complicated.

Note: Only administrators can create aliases, because they have the ability to see across domains and can prevent conflicts.

You can also create and share a URL to a specific page in a portal allowing users to navigate to it directly. This feature is especially useful in a portal with multiple portal pages or as a way to supersede the Default Page setting.

Procedure: How to Manage and Use an Alias in a Collaborative Portal

1. Access the Manage Alias option in one of the following ways:
 - ☐ On the Home Page, in the Content view, in the Resources tree, right-click a collaborative portal, and then click *Manage Alias*.
 - ☐ On the Home Page, in the Portals view, right-click a collaborative portal, and then click *Manage Alias*.
 - ☐ On the Legacy Home Page, in the Resources tree, right-click a collaborative portal, and then click *Manage Alias*.

The Manage Alias dialog box opens.

2. In the Alias field, type the alias you want to use for the portal URL.

The Alias URL entry updates with the name of your alias, as shown in the following image.

The screenshot shows a 'Manage Alias' dialog box. It contains the following fields and values:

- Title:** Q1_Sales_Dashboard
- Path:** IBFS/WFC/Repository/Retail/Sales/Sales_Dahsboards/Quarter_R...
- Default URL:** http://bigscm158.ibi.com:8080/ibi_apps/portal/Retail/Sales/Sale...
- Alias:** Test_Alias
- Alias URL:** http://bigscm158.ibi.com:8080/ibi_apps/portal/Test_Alias

At the bottom right, there are 'OK' and 'Cancel' buttons.

3. Copy the Alias URL.

Note: To copy an inactive field, select an entry and press CTRL+C on your keyboard.

4. Click OK.
5. Paste the alias URL in a new browser window and run it.

The portal runs from the alias URL.

Procedure: How to Target a Specific Portal Page While Running a Portal

1. Create a portal as described in [Creating a Portal](#) on page 88.
2. In the Portal Designer, create a portal page to which you want to navigate directly, and make a note of its name.

The Page Name field can be found in the following locations:

☐ **Basic Portal.** In a page properties panel.

☐ **Collaborative Portal.** In the New Page Information section of the Add Page dialog box.

3. Save and close the portal.
4. In a desktop browser, type one of the addresses below.

For a basic portal:

http://server:port/ibi_apps/bip/portal/Portal_Name?page=page_name

For a collaborative portal:

http://server:port/ibi_apps/portal/Portal_Name?page=page_name

where:

[*server*](#)

Is the name of the server on which WebFOCUS is installed.

[*port*](#)

Is the port number on which the server is listening.

[*Portal_Name*](#)

Is the name of your portal.

Note: You can find the name of a portal by hovering over this portal in the Resources tree and viewing the tooltip.

[*page_name*](#)

Is the name of your designated portal page.

The portal runs, and the portal page that you specified displays.

Working With Portal Pages

Portal pages are a vital part of the BI Portal architecture. Basic and collaborative portals allow different levels of versatility in the way you organize and interact with portal pages. In a basic portal, pages are a part of the portal structure and can only be used inside a specific portal. In a collaborative portal, pages become part of the content structure, and you can share, reuse, link, copy and move them between different portals, domains, or folders.

There are two types of pages in a portal. These include:

- ❑ **Base Portal Page.** Created at design time by a developer or administrator. If a base portal page is unlocked, users can customize it at run time. If the user removes customizations or the administrator removes all user customizations from the portal, all changes made by the user are removed, and the base portal page reverts to its default state. The visibility of the base portal pages is controlled by the security rules of the domain or portal.
- ❑ **Personal Portal Page.** Created at run time by the user. Personal portal pages are stored in the repository but they are not visible in the Resources tree. If the user removes customizations or the administrator removes all user customizations from the portal, all personal portal pages are removed. Personal portal pages are only visible to the user that has created these pages.

In a collaborative portal, you have additional ways of accessing portal pages. These include:

- ❑ **Linked Portal Page.** Linked to a portal at design time or run time from the repository. If the portal page is linked at design time, its behavior is similar to the base portal page. If the portal page is linked at run time, it behaves like a personal portal page. In both cases, all customizations that are made to a linked portal page in a portal do not affect the original portal page in the repository. If the original portal page is edited or deleted from the repository, this change is reflected in the linked portal page in the portal. If the linked portal page is removed from the portal, the original portal page remains in the repository. Linked portal pages are only available for collaborative portals.
- ❑ **Copied Portal Page.** Copied from the repository. Copied portal pages are custom versions of a page, with no link to the original page in the repository. Copied portal pages can be added both at design or run time. If a copy of a portal page is added to a portal at design time, it behaves like a base portal page. Conversely, if a copy of a portal page is added to a portal at run time, it behaves like a personal portal page. Copied portal pages are only available for collaborative portals.

- ❑ **Stand-alone Portal Page.** Created with the Page Designer directly in a domain or folder. A stand-alone portal page can be copied or linked to a portal. If a portal page is unlinked from a portal, it becomes a stand-alone portal page and can be reused in a different portal.

Note: To avoid unwanted behaviors, you should not edit portal pages in the Portal Designer or Page Designer, or move or unlink portal pages in the repository, while users are running the affected portals.

***Procedure:* How to Add a Base Page to a Portal**

1. Create a new portal.
If you create a new collaborative portal, you must select a page template in the Add Page dialog box.
2. In the Portal Designer, add content to the page.
If left blank, panels behave like Easy Selector containers at run time. To learn more about the Easy Selector, see [Using the Easy Selector](#) on page 135.
3. Optionally, lock the page to prevent run time edits. Select the *Lock Page* check box in the Properties panel.
4. Save and close the Portal Designer.
A new portal and base portal page are created.
To add a new base portal page to an existing portal, edit the portal, and add a new portal page.

***Procedure:* How to Add a Personal Page to a Portal**

1. Run an existing portal.
 - ❑ From the Legacy Home Page, in the Resources tree, right-click an existing portal, and then click *Run*.
 - ❑ From the WebFOCUS Home Page, in the Explorer, right-click an existing portal and then click *Run*.

The portal opens in a new tab or browser window depending on your browser configuration.
2. Click the *New Page* icon, which is the last item in the navigation bar.
In a basic portal, a new portal page and the WebFOCUS Resources tree open, so you can start adding content to the new portal page.
In a collaborative portal, the Add Page dialog box opens, allowing you to choose a template for your new portal page. Once you select a template and click *OK*, the new portal page opens.

You can rearrange your personal portal pages using drag-and-drop operations. Your personal portal pages always come after any base portal pages that were created using the Portal Designer. You can also rename, rearrange, refresh a portal page, or delete a portal page using the shortcut menu options.

Procedure: How to Link a Portal Page to a Collaborative Portal

1. Run a collaborative portal.
2. Link to an existing portal page in one of the following ways:

❑ From the Add Page dialog box.

1. Click the *New Page* icon.

The Add Page dialog box opens.

2. Click *Link To Existing Page*, as shown in the following image.



The Open dialog box opens.

3. Select a portal page to which you want to link and click *Open*.

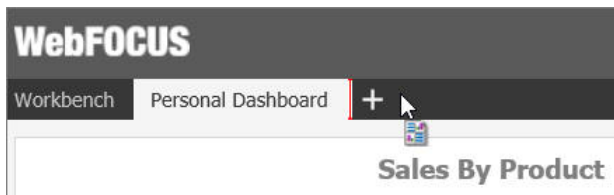
The new linked portal page displays in the portal.

❑ From the WebFOCUS Resources tree.

1. On the Menu bar, click *Resources*.

The WebFOCUS Resources tree opens.

2. Select a portal page and drag it onto the Navigation bar, as shown in the following image.



The new linked portal page displays in the portal.

3. Optionally, customize the portal page to fit your needs.

Your customizations are visible to you and will not affect the original portal page in the repository. You can remove the linked portal page from the portal by clicking *Remove* in the shortcut menu. If the original portal page in the repository is edited or deleted, these changes affect the linked portal page in your portal.

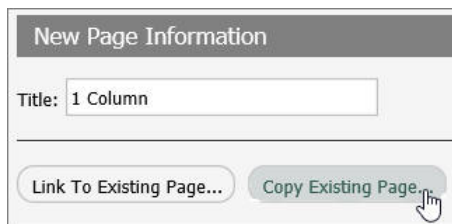
If you add a linked portal page at design time, it becomes a base portal page.

Procedure: How to Add a Copy of a Portal Page to a Collaborative Portal

1. Run a collaborative portal.
2. Click the *New Page* icon.

The Add Page dialog box opens.

3. Click *Copy Existing Page*, as shown in the following image.



The Open dialog box opens.

4. Select a portal page and click *Open*.

A copy of the portal page, and the associated Title opens in the Add Page dialog box.

5. Click *Create*.

The copy of a portal page displays in the portal.

6. Optionally, customize the portal page to fit your needs.

Your customizations are visible to you and will not affect the original portal page in the repository. You can delete the copied portal page from the portal by clicking *Delete* in the shortcut menu. If the original portal page in the repository is edited or deleted, these changes will not affect the copy of that portal page in your portal.

If you add a copy of a portal page at design time, it becomes a base portal page.

Procedure: How to Create a Stand-alone Portal Page

1. Create a new page in one of the following ways:
 - ☐ From the Legacy Home Page, in the Resources tree, right-click a domain or folder, point to New, and then click *Portal Page*.
 - ☐ From the WebFOCUS Home Page, select a domain or folder. On the actions bar, click *Portal Page*.

The Page Designer and the Add Page dialog box open.

2. Select a page template and, optionally, edit the Title and Name fields.
3. Click *Create*.

The portal page displays in the Page Designer.

4. Optionally, add content to the portal page.

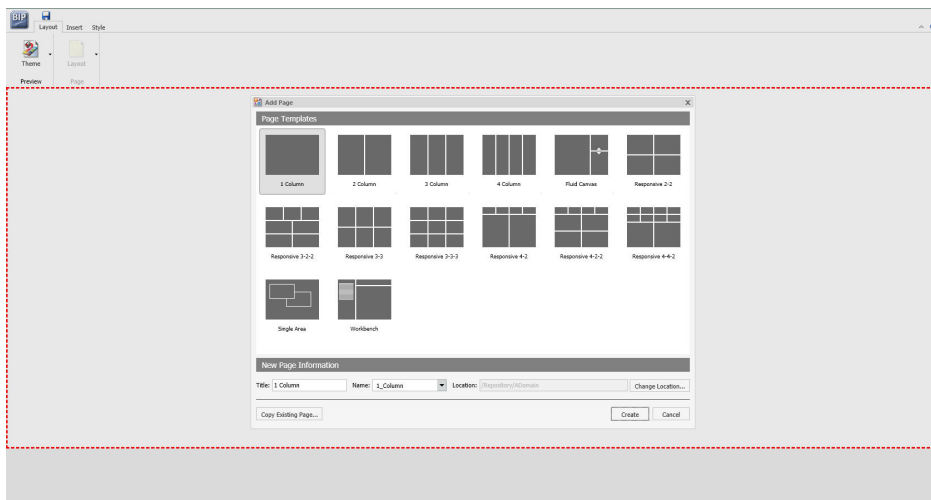
If left blank, panels behave like Easy Selector containers at run time. To learn more about the Easy Selector, see [Using the Easy Selector](#) on page 135.

5. Save and close the Page Designer.

The new stand-alone portal page displays repository. You can now copy, move, and link this portal page to portals.

Reference: Page Designer

The Page Designer is a subset of a Portal Designer. It allows you to create stand-alone portal pages inside domains and folders of your choice. The Page Designer interface is shown in the following image.



The Page Designer contains three primary elements:

☐ **Page Templates.** Preset layouts that you can use to quickly create portal pages. This feature is identical to the one in the Portal Designer, when you create collaborative portals. To learn more about page templates, see [Page Templates](#) on page 93.

☐ **Ribbon.** The ribbon is the abridged version of the ribbon in the Portal Designer that contains the following tabs:

☐ **Layout.** Allows you to select a theme and choose a layout for your portal page.

Note: Custom themes do not get saved in the Page Designer, because portal pages cannot be run on their own and do not have their own CSS files. In Page Designer, the Custom Theme CSS and CSS Editor features act as tools to create a preview of what the portal page looks like, using a selected CSS theme. You can only apply and save this theme when the portal page is inside a portal.

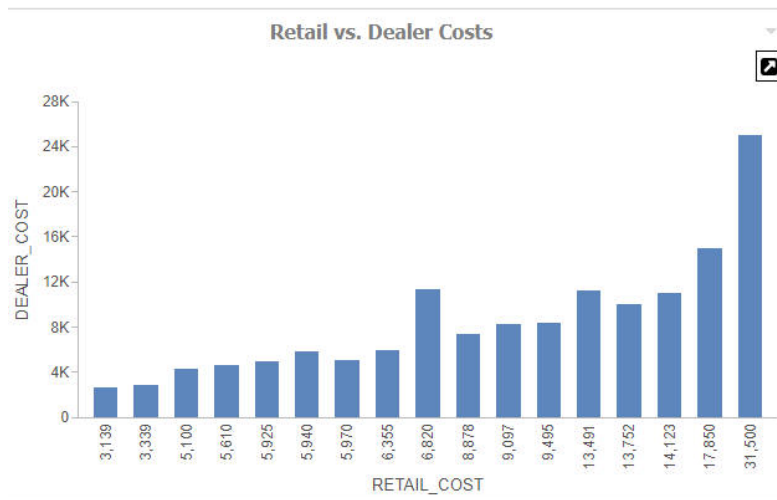
☐ **Insert.** Provides choices of containers and content that you can add to a portal page.

☐ **Style.** Applies styles to common properties, such as background, border, and font.

☐ **Properties Panel.** The Properties panel appears near the bottom of the window, below the canvas. It shows properties that apply specifically to the currently selected item.

To learn more about these options, see [Portal Designer Overview](#) on page 88.

When you add Insight-enabled content to a portal page, it will run as a standard HTML5 chart. An Explore with Insight icon displays, as highlighted in the following image.



You can view the content in Insight mode by clicking the Explore with Insight icon. Content opens in a new browser tab.

Removing Customizations

All users can remove their own customizations for either a portal or a particular page in a portal. Developers and administrators can also remove all user customizations, which include all personal portal pages created by users at run time, as well as any changes made to unlocked portal pages at run time.

You can remove customizations in one of the following locations:

- ☐ From a portal in the repository.
- ☐ From a portal at run time.

Procedure: How to Remove Customizations From a Portal in the Repository

1. Right-click a basic or collaborative portal from the Legacy Home Page or WebFOCUS Home Page.
2. Point to *Customizations* and click one of the following options:
 - ☐ **Remove My Customizations.** Removes your own customizations from a portal, deletes your personal portal pages, and unlinks any portal pages that were linked at run time.
 - ☐ **Remove Customizations for All Users.** Removes all user customizations, any personal portal pages created at run time, and any links to portal pages that were linked at run time.

Procedure: How to Remove Customizations From a Portal Page in the Repository

1. Right-click a portal page from the Legacy Home Page or WebFOCUS Home Page.
2. Point to *Customizations* and click one of the following options:
 - ☐ **Remove My Customizations.** Removes your own customizations, deletes your personal portal pages, and unlinks any portal pages that were linked at run time.
 - ☐ **Remove Customizations for All Users.** Removes all user customizations, any personal portal pages created at run time, and any links to portal pages that were linked at run time.

Procedure: How to Remove Customizations From a Portal at Run Time

1. From the Menu Bar of a portal, click your username.

2. Click *Remove My Customizations*.

The customizations are removed from the portal and its pages. Personal pages are removed. Pages that were linked at run time are unlinked.

Procedure: How to Remove Customizations From a Page at Run Time

1. Inside the running portal, right-click a page tab.
2. Click *Remove My Customizations*.

The portal refreshes. The customizations are removed from the modified portal page.

Note: This option is not available when the Lock Page option is selected.

Using the Easy Selector

The Easy Selector provides a simple way to add content to a portal at run time, without opening the Resources tree. It also allows you to control which items users can access.

You can enable the Easy Selector feature on a container or a column level.

Procedure: How to Use the Easy Selector Container

1. Sign in to WebFOCUS as a developer or an administrator.
2. In the Repository, populate a new or existing folder with the content that you intend to make available through the Easy Selector at run time.

Note: Ensure that the folder only includes file content and no subfolders.

3. Ensure that the folder is published.
4. Create a new portal or edit an existing portal.
5. In the Portal Designer, on the *Insert* tab, in the *Containers* group, click *Easy Selector*.

The Easy Selector container is added to the portal page. The Browse For Folder dialog box opens next to the Easy Selector container, allowing you to select a target folder.

6. Optionally, navigate to the folder that you want to display inside the Easy Selector at run time, and then click *OK*. If no target folder is selected, the entire repository displays at run time, allowing the user to explore all available domains and folders.

Note: You can change the folder location by clicking the *Select Folder* button in the Properties panel, and navigating to a different folder. It is not recommended to change the folder location after the end users have begun using the Easy Selector.

7. Create additional Easy Selector containers, if needed.

Note: You can multiselect the containers by holding the Ctrl key.

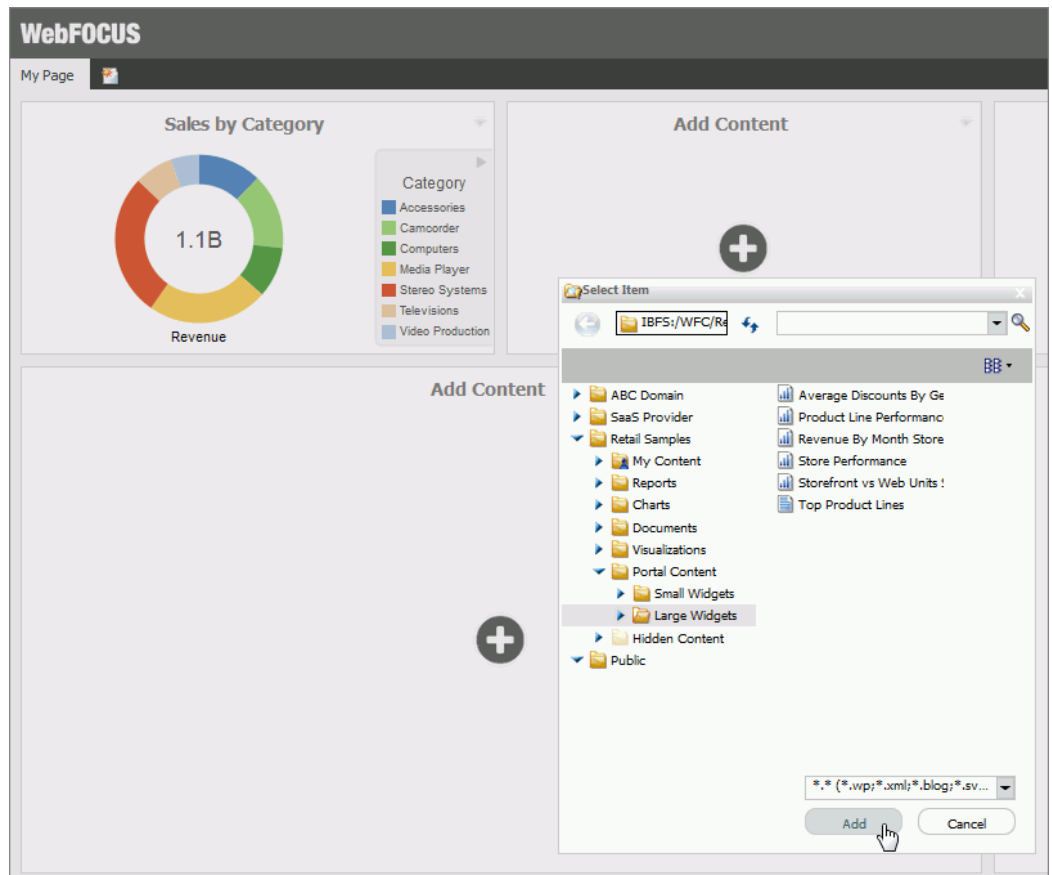
8. Click **Save**, and close the Portal Designer.
9. Run the portal where you added the Easy Selector containers.

When the portal opens, it displays the *Add content* button in each column for which you have enabled the Easy Selector.

10. Click the *Add content* button.

The Select Item dialog box opens.

11. Navigate to an item that you want to display and click *Add*, as shown in the following image.



The selected item opens inside the Easy Selector container.

Procedure: How to Use Easy Selector in a Column

1. Sign in to WebFOCUS as a developer or an administrator.
2. In the Repository, populate a new or existing folder with the content that you intend to make available through the Easy Selector at run time.

Note: Ensure that the folder only includes file content and no subfolders.

3. Ensure that the folder is published.
4. Create a new portal or edit an existing portal.
5. In the Portal Designer, right-click the page canvas, and click *Page Layout*.
6. From the Choose a Layout menu. Set the page layout to *One Column*, *Two Columns*, *Three Columns*, or *Four Columns*.

Note: Easy Selector functionality is only available for columnar layouts. It is not available for the Single Area and Fluid Canvas layouts. In addition, the Easy Selector feature is not available for use with the Responsive container.

7. With the page canvas selected, in the Properties panel, clear the *Lock Page* check box and select the *Prevent Layout Change* check box.

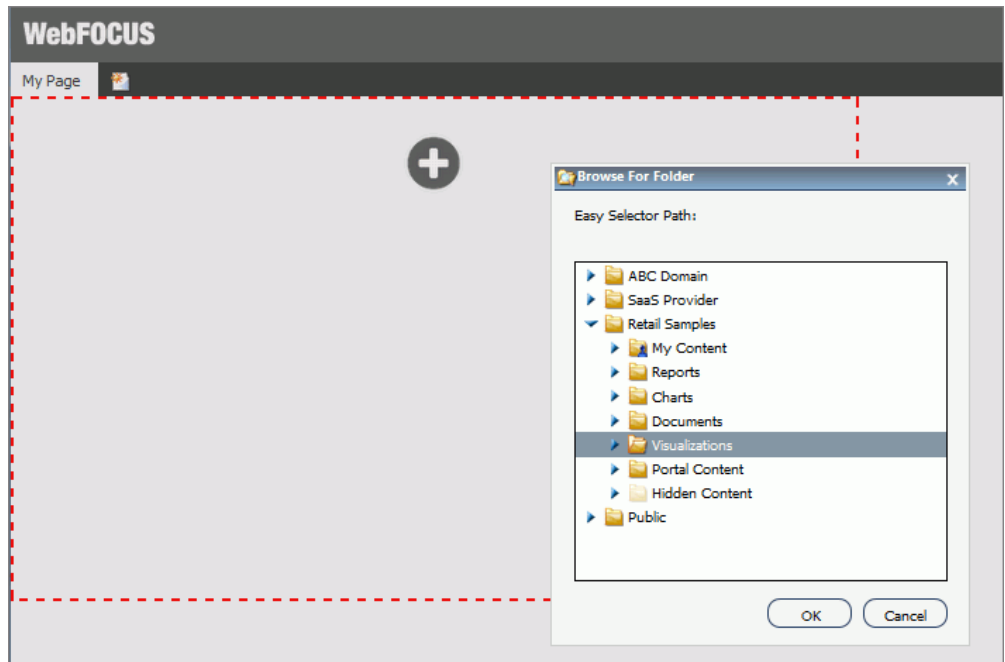
Note: This configuration allows users to add new content to a portal at run time, while preventing them from changing the column layout, which is important for the Easy Selector.

8. In the Properties panel, click *Container Defaults*.

The Container Defaults dialog box opens. Here you can customize the drop-down menu for the items that are displayed on the portal page at run time. Click *OK* to close the Container Defaults dialog box.

9. Select a column.
10. In the Properties panel, select the *Show Easy Selector* check box.

The Browse For Folder dialog box opens and displays the same folder structure that you see in the Repository, as shown in the following image.



11. Click the folder you that want to display inside the Easy Selector at run time, and then click *OK*.

Note: You can change the folder location by clicking the *Select Folder* button and navigating to a different folder. It is not recommended to change the folder location after the end users have begun using the Easy Selector.

12. Modify any other columns to use the Easy Selector, if needed.

Note: You can multiselect the columns by holding the Ctrl key.

13. Click *Save* and close the Portal Designer.
14. Run the portal where you added the Easy Selector containers.

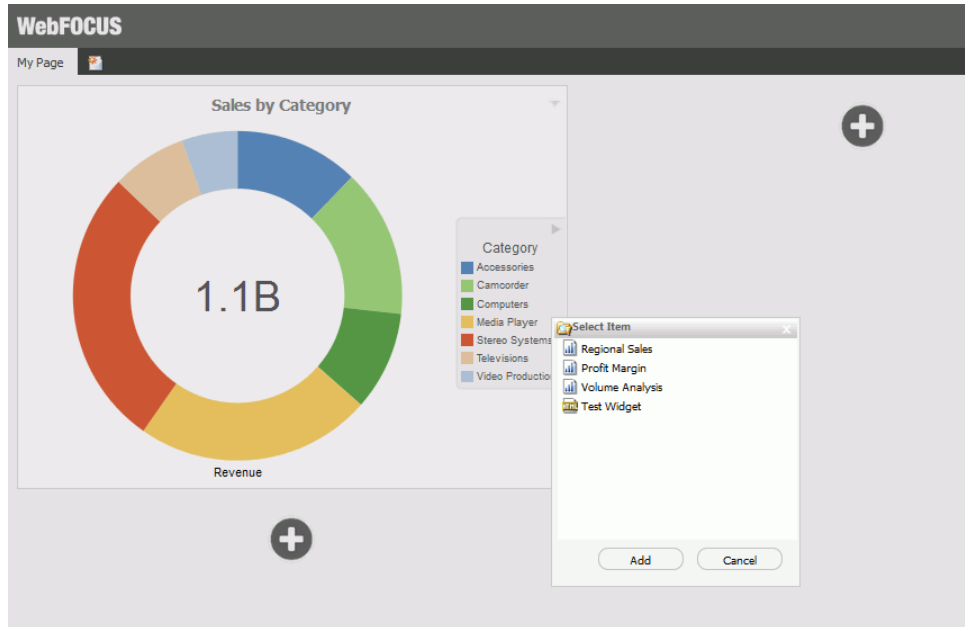
When the portal opens, it displays the *Add content* button in each column for which you have enabled the Easy Selector.

15. Click the *Add content* button.

The *Select Item* dialog box opens.

16. Select an item from the list and click *Add*.

The selected item opens and a new Add content button displays in the next column. This allows you to add the remaining items that are available to you. You can also multiselect items inside the Select Item dialog box, as shown in the following image.



Additionally, you can replace an item on the portal page with any item from the Select Item dialog box. You can access the Replace option by clicking the arrow in the upper-right corner of the container panel.

Note: The Add content button disappears and the Replace option becomes inactive after the last item in the Select Item dialog box is added to the page.

Building a Basic Responsive Portal

A responsive portal allows you to create layouts that resize dynamically to any width based on screen size, device, and orientation, thus eliminating the need to design for a specific device preference. This approach takes your content beyond the desktop and delivers a quality experience to users, on any display. The Portal Designer offers you a series of versatile presets, that make the task of creating a responsive portal a quick and straightforward process.

There are two methods for building a responsive portal: percentage-based and pixel-based. Both methods produce responsive behavior. The percentage-based responsive portal uses percentages to scale columns and panels to any width, while the pixel-based responsive portal relies on the developer to set a range within which the content will fluctuate in size. Follow the procedures below to see how these methods create a basic responsive portal in the Portal Designer.

A user must have the privileges of a developer or administrator to be able to build a basic responsive portal.

Procedure: How to Build a Basic Responsive Portal Using Percentages

1. Sign in to WebFOCUS as a developer or an administrator.
2. Create a new basic portal or open an existing basic portal.

See [Creating a Portal](#) on page 88 for more information on creating a new basic portal.

3. In the Portal Designer, right-click the page canvas, and then click *Page Layout*. You can also click the *Layout* button on the Layout tab, in the Page & Banner group.

The Choose a Layout menu opens.

4. Click *One Column*.

All responsive layouts are created in a one column page layout.

5. Click inside the column that you just created. On the Properties panel, set the *Top Container Padding* to *5px* and select the *Same for All* check box.
6. On the *Insert* tab, in the *Containers* group, click *Responsive*.

The Responsive container is inserted, taking up the full width of the page.

7. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.
8. Populate the responsive container with content from the folder of your choice, by dragging them to the container.

When you drag items sequentially, you can choose the order in which they display, using the shaded placement indicator as a guide. When you drag items simultaneously, using the multiselect option (Ctrl key), they display in the order in which they are selected.

Note: Your portal page can also contain a responsive filter panel that was created in WebFOCUS App Studio. For more information on how to create responsive filter panels that you can add to a BI Portal, see the App Studio technical content.

9. Multi-select the panels to which you want to assign the Custom CSS Classes by holding the Ctrl key and clicking a title bar of each panel.

For example, if you were going to create a responsive portal that contained four items in the first row, and two items in the second row, you would select the first four panels.

Note: You can only multi-select panels by clicking its title bars. If the title bars are hidden, you cannot multi-select these panels.

10. On the Properties tab of the Properties panel, click the *Responsive Properties* button.

The Advanced Responsive Item Properties dialog box opens.

11. In the Custom CSS Classes field, type *bip-responsive-n*, where *n* is the responsive folding behavior that you want to apply the content on your page.

For example, *bip-responsive-4-2-1* means that the content will display four items across on wide screens, two items across on medium screens, and one item across on narrow screens. If you use *bip-responsive-3-2-1*, the content will display three items across, then two items across, then one item across. If you use *bip-responsive-2-1*, content will display two items across, then one item across. If you choose *bip-responsive-1*, the item will fill the entire row.

In the following image, we have updated the Custom CSS Classes field for a page that uses the 4-2-1 responsive folding behavior for the first four items on the page.

Advanced Responsive Item Properties

Custom CSS Classes:

Width: Height: Margin:

Shrink: Grow: Basis:

Minimum... Width: Maximum... Width:

Height: Height:

Self Align:

Note: When one of the built-in responsive classes is used in the Custom CSS Classes field, it sets the width of the panel as a percentage of the page width, based on media queries. The percentage width setting made in these built-in responsive classes overrides any width settings defined on the panel.

12. Click *OK* to close the Advanced Responsive Properties dialog box.

The first row of panels are now stretched evenly across the Responsive container.

13. Multiselect the remaining panels by holding the Ctrl key and clicking each panel.

14. On the Properties panel, click the *Responsive Properties* button.

The Advanced Responsive Item Properties dialog box opens.

15. In the Custom CSS Classes field, type *bip-responsive-2-1*, as shown in the following image. This will enable the remaining two panels to go from two across to one across on a smaller screen.

Advanced Responsive Item Properties

Custom CSS Classes:

Width: Height: Margin:

Shrink: Grow: Basis:

Minimum... Maximum...
Width: Width:
Height: Height:

Self Align:

16. Set Minimum Height to *440px*.

17. Click *OK* to save the properties.

The remaining panels now stretch across the Responsive container, in the second row.

Note: You can create multiple layouts using this principle and varying the CSS classes to reflect the desired percentage.

18. With the Responsive container selected, make the following changes:

- ☐ On the Properties tab of the Properties panel, set Height to *Dynamic*.
- ☐ On the Title tab of the Properties panel, select the *Hide Title Bar* check box.
- ☐ On the Style tab of the ribbon, in the *Border* group, click *Style*, and then select *None*.

Note: These changes render the Responsive container invisible on the page at runtime, and in Portal Designer. To edit the content in your Responsive container or access its properties, you can use the breadcrumb trail below the Property sheet to select it.

19. Click the Save button and close the Portal Designer.
20. Run your portal.
21. Change the size of your browser window to observe the responsive behavior.

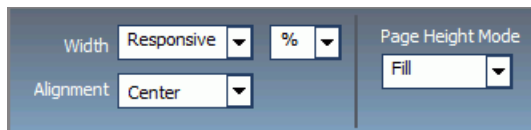
All items rearrange perfectly to fill the portal page.

Procedure: How to Build a Basic Responsive Portal Using Pixels

1. Sign in to WebFOCUS as a developer or an administrator.
2. Create a new basic portal or open an existing basic portal.

See [Creating a Portal](#) on page 88 for more information on creating a new basic portal.

3. In the Portal Designer, in the portal Properties panel, set the Width to *Responsive*, as shown in the following image.



Keep the default values for the Alignment and Page Height Mode options.

The banner width changes in live preview to match the closest preset width.

4. Right-click the page canvas, and then click *Page Layout*. You can also click the *Layout* button on the Layout tab, in the Page & Banner group.

The Choose a Layout menu opens.

5. Click *One Column*.

All responsive layouts are created in a one column page layout.

6. Click inside the column that you just created. On the Properties panel, set the *Top Container Padding* to *5px* and select the *Same for All* check box.
7. On the *Insert* tab, in the *Containers* group, click *Responsive*.

The Responsive container is inserted, taking up the full width of the page.

8. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.
9. Populate the responsive container with six content items from the folder of your choice, by dragging them to the container.
10. Multiselect the last two panels by holding the Ctrl key and click the *Responsive Properties* button.

The Advanced Responsive Item Properties dialog box opens.

Note: The range of minimum and maximum width and height is already filled by default for a small panel. You can change these values to adjust panel size and to create different layout. Keep in mind that in a responsive portal, setting fixed dimensions for items is not recommended. For this reason, you must only set a range between minimum and maximum width and height, defining the amplitude with which the item can vary in size.

11. Set the responsive item properties, as follows:

- a. Set Minimum Width to 380px.
- b. Set Maximum Width to 710px.
- c. Set Minimum Height to 440px.

An example of the completed configuration is displayed in the following image.

12. Keep the default values for all other properties, and click OK.

The two bottom panels change size simultaneously. The layout now features two even lines of panels, four small and two large ones.

13. With the Responsive container selected, make the following changes:

- ☐ On the Properties tab of the Properties panel, click the *Responsive Properties* button, and then set Height to *Dynamic*.
- ☐ On the Title tab of the Properties panel, select the *Hide Title Bar* check box.
- ☐ On the Style tab of the ribbon, in the Border group, click *Style*, and then select *None*.

Note: These changes render the Responsive container invisible on the page at runtime, and in Portal Designer. To edit the content in your Responsive container or access its properties, you can use the breadcrumb trail below the Property sheet to select it.

14. Click the Save button and close the Portal Designer.

Your new responsive portal now appears in the Repository.

External CSS Theme Support

External CSS Theme support is an advanced feature that enables you to customize a portal by applying or modifying external CSS files. It also allows you to edit any HTML element of your portal by adding CSS classes to it and specifying CSS properties, and see the visual impact of your changes in real time.

The CSS Theme feature consists of two parts:

- ☐ Portal Theme Files browser
- ☐ CSS Editor

In the Portal Theme Files browser, you can configure CSS files. The CSS Editor is designed to edit specific components of the existing CSS theme.

You must be signed in as a developer or administrator to use this feature in the Portal Designer.

Procedure: How to Configure CSS Files

1. Sign in to WebFOCUS as a developer or an administrator.
2. Create a new Enterprise Domain with a basic portal.
3. On the Legacy Home Page, expand the new domain folder, right-click the *Hidden Content* folder, point to *New*, and then click *Text Editor*.

The new Text Editor window opens. Here you can enter CSS classes and enter CSS properties for your portal. In this example, we are modifying container border color and selected tab color.

4. Enter the following syntax in your Text Editor window:

```
.bip-container
{
    border: 1px solid rgb(87, 168, 250);
    border-radius: 0px;
}
.bip-tab-button-checked
{
    color: rgb(87, 168, 250);
    font-weight: 700;
    border-bottom-width: 1px;
    border-bottom-style: solid;
    border-bottom-color: rgb(87, 168, 250);
    background-color: white;
}
```

5. Click the Save button.

The Save As dialog box opens.

6. Populate the title field, select the *Cascading Style Sheet* format from the drop-down list, and then click Save.
7. Close the Text Editor window.
8. On the Legacy Home Page, in the Resources tree, right-click your new portal, and then click *Edit*.

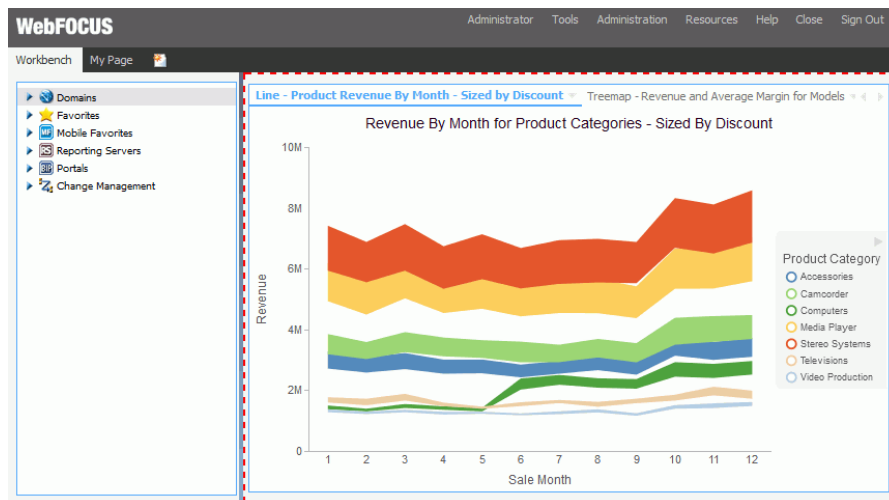
The Portal Designer opens.

9. On the *Layout* tab, click *Theme*.

The Portal Theme Files dialog box opens. The Neutral theme is selected as a Base theme by default.

10. Under Custom CSS Theme, click *Browse*.
11. Navigate to your new CSS file and click *Open*.
12. Click *Apply* and close the Portal Theme Files dialog box.

The color of container borders and selected tabs change to blue, as shown in the following image.






13. Click the Save button and close the Portal Designer.

Procedure: How to Customize CSS Properties in the CSS Editor

1. Launch the Portal Designer.
2. On the *Layout* tab, in the *Portal* group, click the Theme button splitter, then click *Launch CSS Editor*.

The Styling dialog box opens.

3. On the toolbar, click the *Show the Element Inspector* button , and then click the *Inspect elements style information* button .

Your cursor changes to a crosshair. You can also click the *Highlight inspected element* button  to pinpoint the element that you want to style more easily.

4. Click a portal element that you want to style, in this example, the top banner.

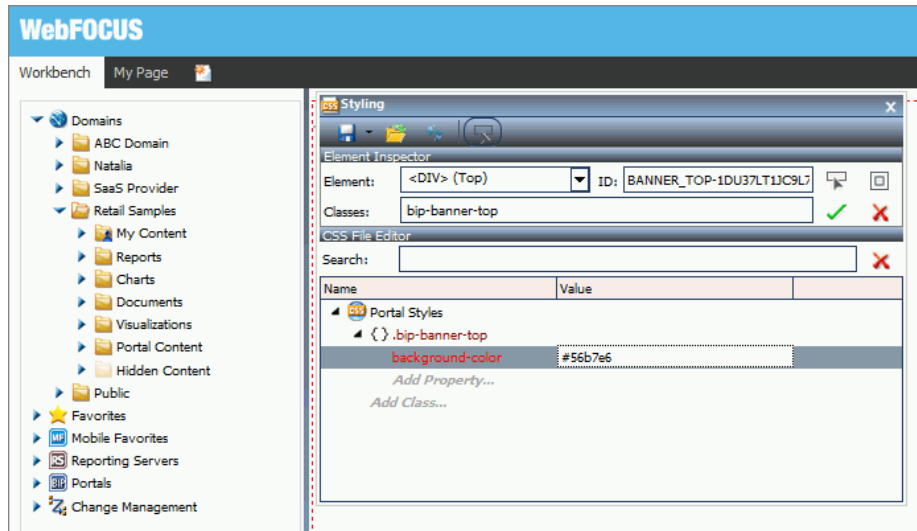
The Classes field is automatically populated with the correct CSS class name for the selected element, in our example *bip-banner-top*.

Note: You can also select elements from the Elements drop-down list, or, if you know the CSS class name of the element, you can type it in the Classes field. You can also use the Search field to search for a CSS class using key words.

5. In the CSS File Editor, click the *Add Class* text, type your CSS class, preceded by a dot, and then press *Enter*.

- Click the *Add property* text below the *.bip-banner-top* class and type *background-color:#56b7e6*, and then press Enter.

The banner instantly changes color to the specified hue, as shown in the following image.



Note: If you have entered an invalid CSS class or attribute, the browser rejects it and the change is not reflected in the portal appearance.

- Click the Save button in the Styling dialog box.
If a custom CSS file is already applied to this portal, your changes will be saved in that file. If the changes are new, the Save As dialog box opens.
- Navigate to the Hidden Content folder of your domain, name your new CSS file, and then click Save.
- Close the Styling dialog box.
- Click the Save button and close the Portal Designer.

Working With Comments

In a collaborative portal, you can use comments to interact with your peers in a multi-user environment. Access to the comments feature is configured in the Security Center, by an administrator.

There are four user privileges that can be set to enable commenting in a portal:

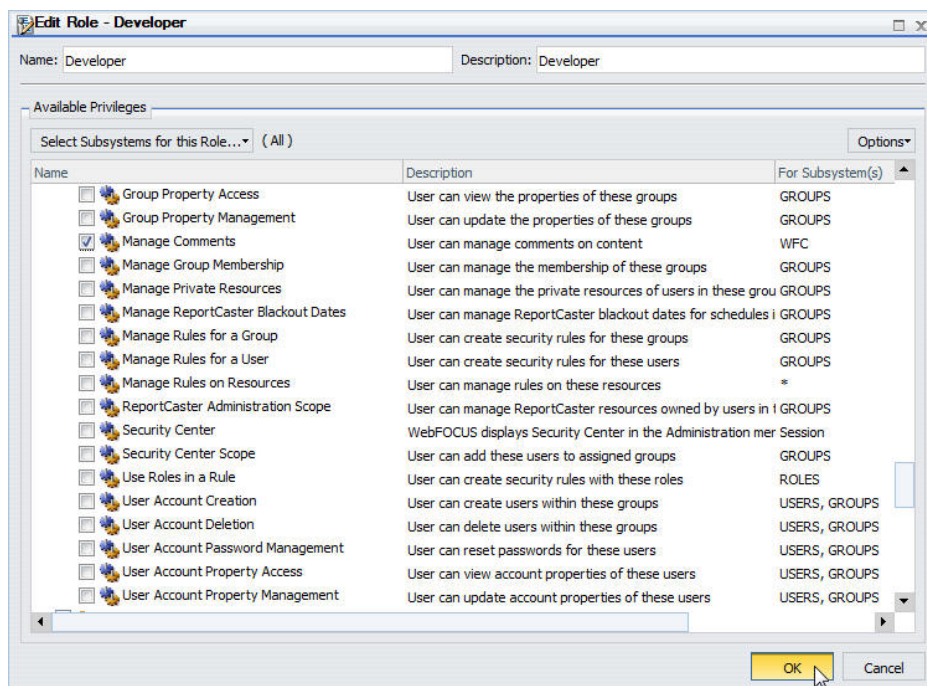
- ☐ **Access Comments.** View comments from other users.

- ☐ **Create Comments.** Create comments and view comments from other users.
- ☐ **Edit Comments.** Edit and delete your own comments.
- ☐ **Manage comments.** Manage comments, including editing and deleting comments from other users, and removing all comments from all users.

Once the comments feature is configured, developers and administrators enable comments in the Portal Designer or Page Designer. You can enable comments on portal pages, containers, and individual content items.

Procedure: How to Configure Comments Privileges

1. Sign in to WebFOCUS as an administrator.
2. Launch the *Security Center*.
3. Click the *Roles* tab.
4. Click the *New Role* button to add a new role or select an existing role from the list and click *Edit Role*.
5. Select the check box next to the privilege that you want to grant to your role, as shown in the following image, and click *OK*.



6. Click the *Users & Groups* tab.
7. Right-click a user or a group, point to *Security*, and then click *Rules*.
8. Select a user or a group from the list.
9. Locate the role that you have created or modified, click the *Access* column, select *Permitted* from the drop-down list, and then click *Apply*.
10. Click *OK* and close the Security Center.

Procedure: How to Enable Comments for a Portal Page

1. Sign in to WebFOCUS as a developer or an administrator.
2. Create a new collaborative portal or edit an existing collaborative portal.
3. In the Portal Designer, in the Properties panel, click the *Comments* drop-down menu and update the style of your comments to reflect any standards.
4. Save the portal and close the Portal Designer.

If you are enabling comments on a stand-alone portal page, open the Page Designer by creating a new portal page or editing an existing portal page, and then repeat Step 3.

Procedure: How to Enable Comments on a Container

1. Sign in to WebFOCUS as a developer or an administrator.
2. Create a new collaborative portal or edit an existing collaborative portal.
3. In the Portal Designer, on the *Insert* tab, in the *Containers* group, click any container button.

The container is placed on the page canvas.

4. In the Properties panel, select *Show Comments*.

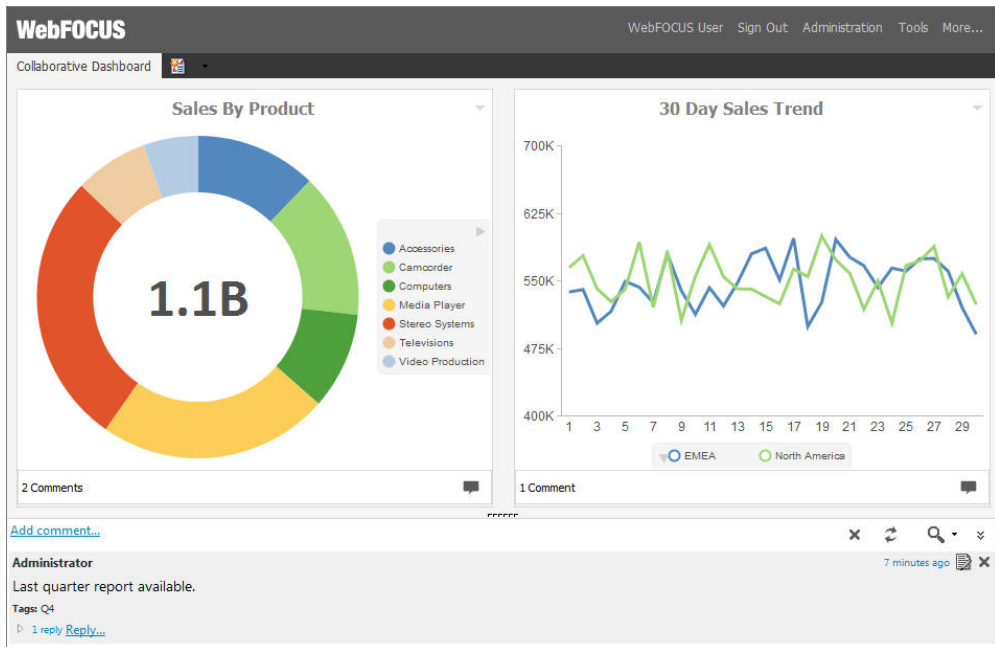
When enabled, this option allows you to show and hide comments on a container or item at run time.

5. Save the portal and close the Portal Designer.

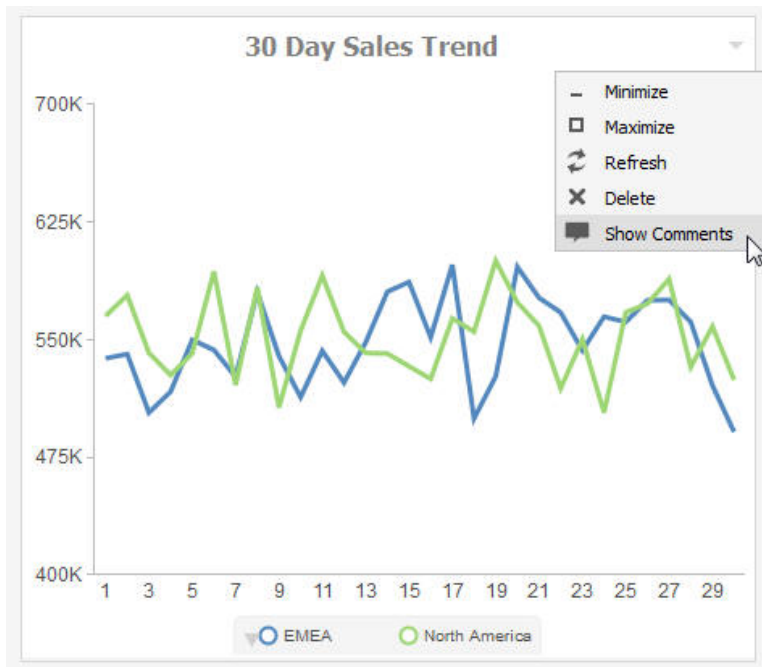
If you are enabling comments in a container, on a stand-alone portal page, open the Page Designer by creating a new portal page or editing an existing portal page, then repeat steps 3 and 4.

Using Comments at Run Time

When enabled, comments display at run time, as shown in the following image.




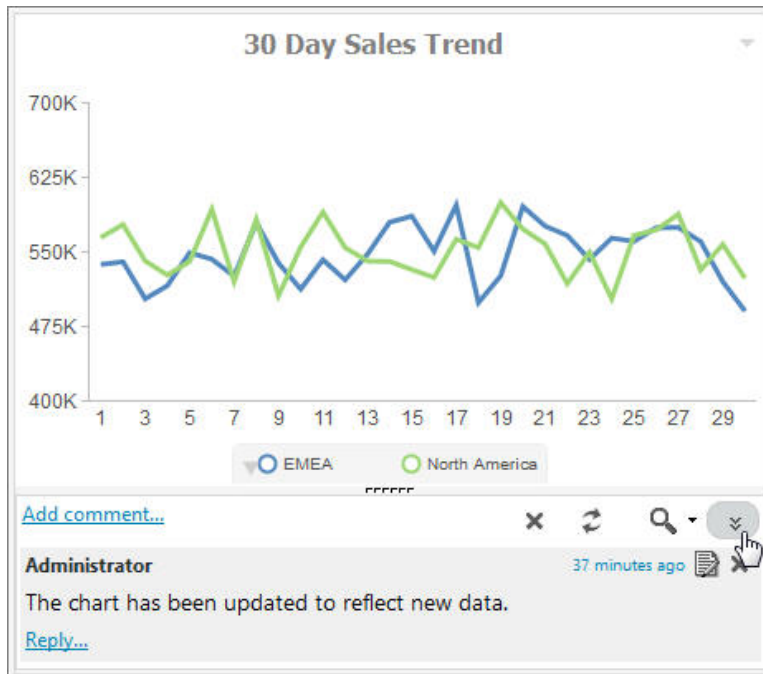
To enable comments on an item at run time, click the arrow in the upper-right corner of the container panel, and then click *Show Comments*, as shown in the following image.




Note: The Show Comments menu option is only available if comments were enabled on a container at design time.

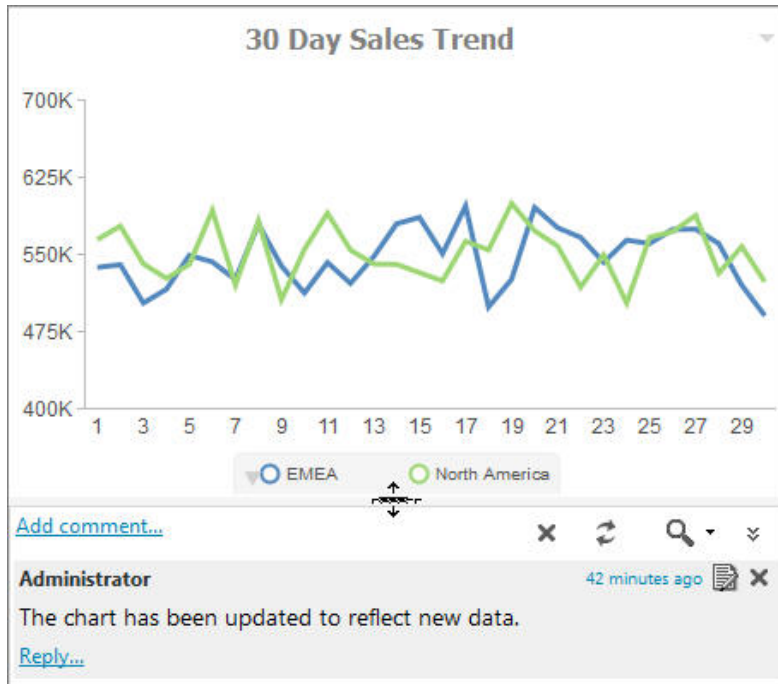
Additionally, you can use the following controls to interact with comments:




- ❑ Click the *Minimize* button  in the upper-right corner of the comment area, to minimize comments, as shown in the following image.



- Click the *Restore* button  in the lower-right corner of the container, to restore the comments area.

- ❑ Customize the height of the comments area by dragging the height indicator to achieve a desirable size, as shown in the following image.



- ❑ Click the *Refresh* button  in the comments menu, to refresh comments.
- ❑ Click the *Search* button  in the comments menu, and type a key word or words in the search field, to search through comments. You can specify the search criteria by clicking the arrow next to the Search button and selecting search criteria, such as user name, content, or meta tags.
- ❑ Click the *Remove All* button  to remove all comments from all users. The Remove All option is only available to users with the Manage Comments privilege.

Localizing Portals

WebFOCUS is a fully internationalized platform that supports the Unicode/UTF-8 standard, enabling operating systems, browsers, and applications to process and display information in virtually any spoken or written language. In addition to these default localization capabilities, users can also localize their own interface customizations. You can localize custom components in WebFOCUS in one of two ways:

- ☐ By implementing symbolic references.
- ☐ By configuring a translation file.

Note: This option is only available for basic portals. It is deprecated in favor of the symbolic references option.

Procedure: How to Localize Custom Components Using a Translation File

1. On the Legacy Home Page, in the Resources tree, right-click a basic portal, and then click *Translations*.

The Translations file opens. The syntax contains the identification number for every component in the portal, its name, and language reference, as shown in the following image.

```
<translations>
  <viewid value="EMBEDDED_PORTAL_1-1WEIVNL07X8" />
  <translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="en_US"
key="name" value="Embedded Portal 1"/>
  <translation id="VIEW-3U1SPSUGZUREZ" language="en_US"
key="description" value=""/>
  <translation id="PAGE1-JB1X909F5FGX9" language="en_US" key="name"
value="Page 1"/>
  <translation id="PAGE1-JB1X909F5FGX9" language="en_US"
key="description" value=""/>
  <translation id="CONTAINER1-JT1SO4V1I13KL" language="en_US"
key="name" value="Panel 1"/>
  <translation id="CONTAINER2-JZ156JV9OZQM7" language="en_US"
key="name" value="Product Line Sales"/>
  <translation id="PANEL11-K41N5OL9ZDRPS" language="en_US" key="text"
value="By Product"/>
  <translation id="PANEL8-KD1A7FGQK9F7R" language="en_US" key="text"
value="Overall"/>
  <translation id="PANEL9-KS1UQOXUF2L3A" language="en_US" key="text"
value="By Regional"/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text" value="Product Line Sales"/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text_base" value="Panel 2"/>
</translations>
```

2. Copy and paste the sections of syntax that you want to translate, and account for as many translations as you need. For example, if you want to translate a basic portal to Spanish, you would only copy and paste the syntax once. If you want to translate a basic portal to Spanish and French, you would copy and paste the syntax twice.

In this example, we only use English and Spanish.

3. In the copied portion of the syntax, change every instance of `en_US` to the language that you want to translate. In this example, we use `es_ES` for Spanish.
4. In the copied portion of the syntax, change the name of every component that appears in quotes after the word *value*, to the equivalent word in the language you are translating.

The modified syntax should look similar to this:


```

<translations>
<viewid value="EMBEDDED_PORTAL_1-1WEIVNL07X8" />
  <translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="en_US"
key="name" value="Embedded Portal 1"/>
  <translation id="VIEW-3U1SPSUGZUREZ" language="en_US"
key="description" value=""/>
  <translation id="PAGE1-JB1X909F5FGX9" language="en_US" key="name"
value="Page 1"/>
  <translation id="PAGE1-JB1X909F5FGX9" language="en_US"
key="description" value=""/>
  <translation id="CONTAINER1-JT1SO4V1I13KL" language="en_US"
key="name" value="Panel 1"/>
  <translation id="CONTAINER2-JZ156JV9OZQM7" language="en_US"
key="name" value="Product Line Sales"/>
  <translation id="PANEL11-K41N50L9ZDRPS" language="en_US" key="text"
value="By Product"/>
  <translation id="PANEL8-KD1A7FGQK9F7R" language="en_US" key="text"
value="Overall"/>
  <translation id="PANEL9-KS1UQOXUF2L3A" language="en_US" key="text"
value="By Regional"/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text" value="Product Line Sales"/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text_base" value="Panel 2"/>
<translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="es_ES"
key="name" value="Portal incrustado 1"/>
  <translation id="VIEW-3U1SPSUGZUREZ" language="es_ES"
key="description" value=""/>
  <translation id="PAGE1-JB1X909F5FGX9" language="es_ES" key="name"
value=" Página 1"/>
  <translation id="PAGE1-JB1X909F5FGX9" language="es_ES"
key="description" value=""/>
  <translation id="CONTAINER1-JT1SO4V1I13KL" language="es_ES"
key="name" value="Panel 1"/>
  <translation id="CONTAINER2-JZ156JV9OZQM7" language="es_ES"
key="name" value=" Línea de productos Ventas "/>
  <translation id="PANEL11-K41N50L9ZDRPS" language="es_ES" key="text"
value=" Por Producto "/>
  <translation id="PANEL8-KD1A7FGQK9F7R" language="es_ES" key="text"
value=" En general "/>
  <translation id="PANEL9-KS1UQOXUF2L3A" language="es_ES" key="text"
value=" Por Regional "/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="es_ES"
key="text" value=" Línea de productos Ventas "/>
  <translation id="TITLEBAR2-L612GN2S7S1CZ" language="es_ES"
key="text_base" value="Panel 2"/>
</translations>

```

5. Optionally, repeat steps 2-4 to add a translation to another language.
6. Save and close the Translations file.

Your translation is complete.

Procedure: How to Localize Custom Components Using Symbolic References

This procedure requires a Java development tool, such as Eclipse, NetBeans, or Java Development Kit (JDK). In this example, we are using Eclipse Java EE IDE.

1. If using Eclipse, follow the steps below:

- a. Launch Eclipse.
- b. Click *File*, point to *New*, and then click *Java Project*.

The New Java Project dialog box opens.

- c. In the Project name field, type the name of your project and click *Finish*.
- d. Right-click your new project, point to *New*, and then click *Package*.

The New Java Package dialog box opens.

- e. In the Name field, type the following name:

```
com.ibi.desired_name.intl.templates
```

where:

```
desired_name
```

Is any identifiable name that you want to use for your localized data.

- f. Click *Finish*.
- g. Right-click the package that you just created, point to *New* and then click *File*.

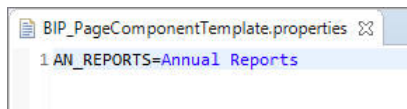
The New File dialog box opens.

- h. In the File Name field, type *BIP_PageComponentTemplate.properties* and click *Finish*.
- i. Double-click the file that you just created.

The editor opens in the right pane.

- j. Type a symbolic reference of your choice, followed by the equal sign, and the value for that symbolic reference.

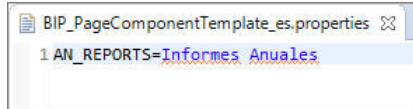
An example of the simple symbolic reference syntax is shown in the following image.



- k. Repeat Steps g and h to create a PROPERTIES file for a different language. In this example, we create a file for the Spanish translation and name it *BIP_PageComponentTemplate_es.properties*.
- l. Double-click the PROPERTIES file for the language you are translating.

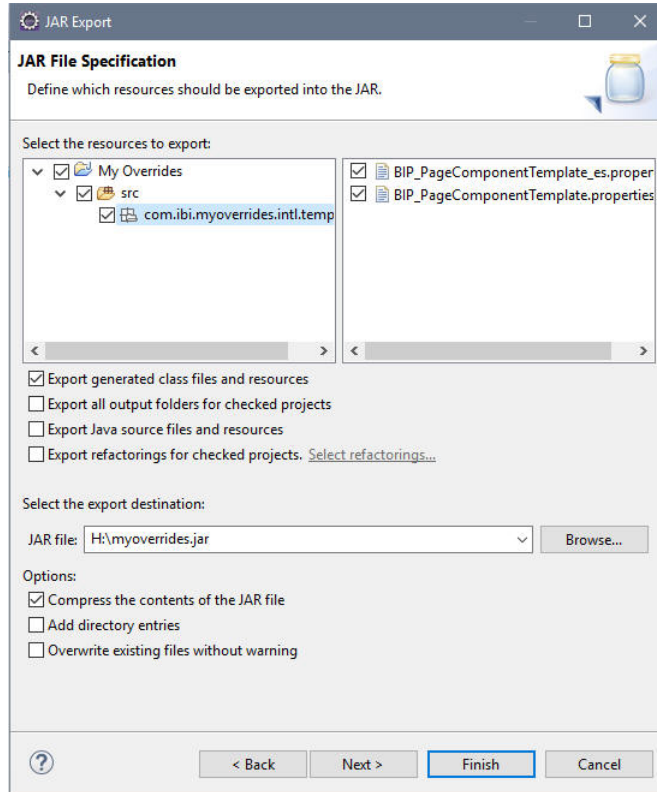
- m. Type the same symbolic reference as you did in the BIP_PageComponentTemplate.properties file, followed by the equal sign, and the Spanish translation of the value.

An example of the Spanish version of the syntax is shown in the following image.



- n. Save and close both PROPERTIES files.
- o. Right-click the project and then click *Export*.
The Export wizard opens.
- p. Under the Java folder, select *JAR file* and click *Next*.
The JAR Export window opens.
- q. Make sure all your elements, such as the project, package, and translated PROPERTIES files, are selected, and click *Browse*.
The Save As dialog box opens.
- r. Point to a location in your environment where you want to export the JAR file.
- s. In the File name field, type the same custom name that you used as part of the package name and click *Save*.

An example of a completed JAR export window is shown in the following image.



- t. Click *Finish* and close Eclipse.
2. If using JDK, follow the steps below:
 - a. In your environment, create the following directory structure:

```
com\ibi\desired_name\intl\templates
```

where:

desired_name

Is any identifiable name that you want to use for your localized data.

- b. Make sure there is one higher level directory above the com folder. In our example the higher level directory is called Localization.
- c. Inside the templates folder, create the BIP_PageComponentTemplate.properties file and its versions for the languages that you want to use.
- d. Create custom symbolic references inside each PROPERTIES file, as described in the previous example.

- e. Save and close PROPERTIES files.
- f. Open the Command Prompt.
- g. Type the following string:

```
Disk:\PROGRA~1\path to JDK\jar cvf jar-file-name.jar -C higher
level directory name/ .
```

where:

Disk:

The disk where the JDK is located.

path to JDK

The path to the JDK inside your Program Files directory.

jar-file-name.jar

The name of your JAR file. Use the same name that you used as part of the directory structure in Step a.

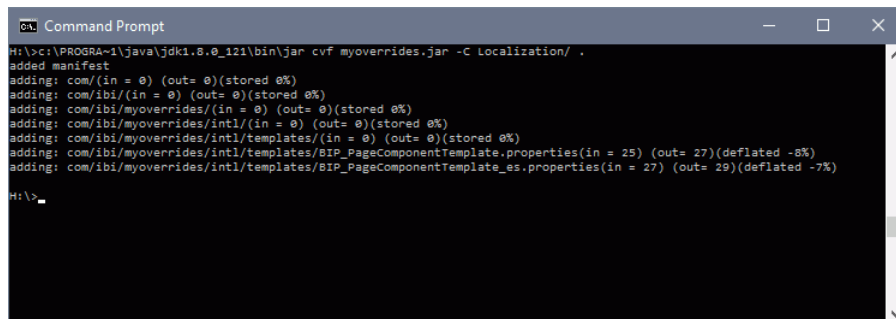
higher level directory name

The name of the directory where the com folder resides.

- h. Press Enter.

The JAR file is created.

The following image shows an example of a completed command.



```

C:\> Command Prompt
H:\>c:\PROGRA~1\java\jdk1.8.0_121\bin\jar cvf myoverrides.jar -C Localization/ .
added manifest
adding: com/(in = 0) (out= 0)(stored 0%)
adding: com/ibi/(in = 0) (out= 0)(stored 0%)
adding: com/ibi/myoverrides/(in = 0) (out= 0)(stored 0%)
adding: com/ibi/myoverrides/intl/(in = 0) (out= 0)(stored 0%)
adding: com/ibi/myoverrides/intl/templates/(in = 0) (out= 0)(stored 0%)
adding: com/ibi/myoverrides/intl/templates/BIP_PageComponentTemplate.properties(in = 25) (out= 27)(deflated -8%)
adding: com/ibi/myoverrides/intl/templates/BIP_PageComponentTemplate_es.properties(in = 27) (out= 29)(deflated -7%)
H:\>

```

3. Navigate to the location of your JAR file, copy the file and paste it into a folder in the Application Server classpath.
4. Login to WebFOCUS as an administrator.
5. Launch the Administration Console.
6. On the Configuration tab, under the Application Settings folder, click *Other*.
7. Select the *Enable Custom Strings* check box, and type the following name in the *Custom Strings* field:

`com.ibi.desired_name`

where:

`desired_name`

Is the name of your JAR file.

The following image shows the completed configuration.



8. Click Save and close the Administration Console.
9. Restart your Application Server.
10. Relaunch WebFOCUS.
11. Create a new collaborative or basic portal.

For more information on creating portals, see [Creating a Portal](#) on page 88.

12. Use your custom symbolic reference to name an element in your portal. In this example, we are using it as a page title. In the page Properties panel, in the Title field, type:

`${value}`

where:

`value`

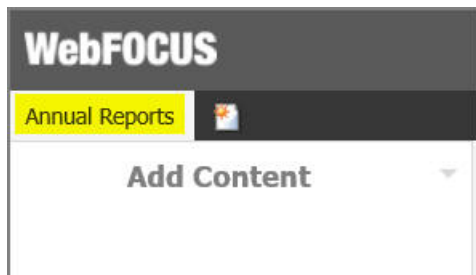
Is the name of your symbolic reference.

An example of a symbolic reference applied in the portal is shown in the following image.



13. Save and close the portal.
14. Run your portal.

The symbolic reference value displays, as shown in the following image.



15. In the portal, on the Menu Bar, click *Language* and select the language you used for your symbolic reference, in this example, select Spanish.

The symbolic reference value changes to its equivalent in the set language, as shown in the following image.



Note: If the Language option is disabled in your WebFOCUS environment, you can enable it in the Administration Console. Under the Dynamic Language Switch settings, select the *Enable Dynamic Language* check box, select the languages that you want to use in your portal from the table, and click Save.

Creating a Custom Sign-in Page

You can create and utilize a custom sign-in page for your WebFOCUS environment. This allows you to override the default sign-in page that ships with WebFOCUS 8, which is a basic logon screen branded for Information Builders.

Creating and Customizing a Sign-in Page

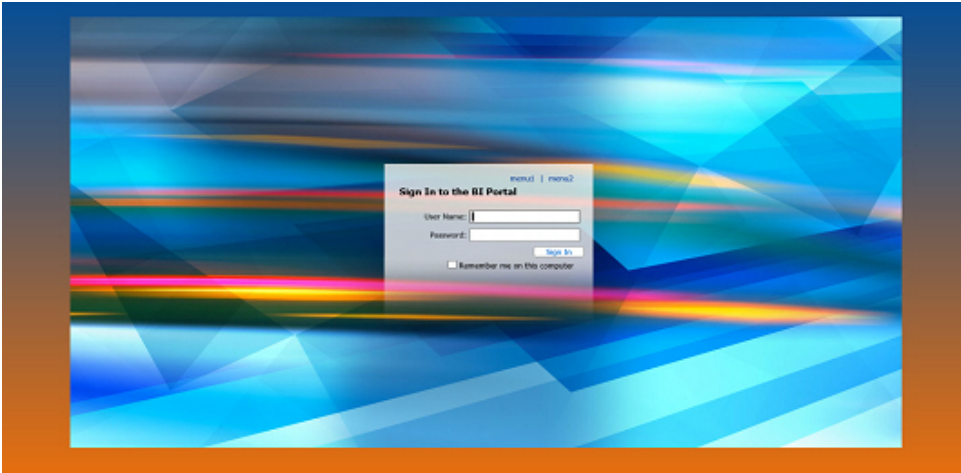
Using a three step process, you can create and customize a sign in page that is specific to your company or organization. The three steps include:

1. [Designing and Enabling the New Custom Sign-in Page](#) on page 164

2. [Setting the Text Labels](#) on page 166
3. [Editing the CSS File to Position and Style Page Elements](#) on page 168

Designing and Enabling the New Custom Sign-in Page

The packaged custom sign in page, as shown in the following image, is made up of a background image that contains a dialog box for the sign-in credentials.



The background image is centered in a div class, providing some space around the image. To design your page, see [How to Design the Page](#) on page 164.

Procedure: How to Design the Page

1. Decide on whether you will use a background image, a color (solid or gradient), or both.
2. Create a mockup in an image editing software that can handle layered PNG files or PSD files, such as Adobe® Fireworks® or Adobe® Photoshop®, respectively. The Open Source Software GIMP can be used to edit the .psd file.
 - a. Open the provided sample multi-layer image.
 - b. Replace the background image in the Custom Background layer with your image or colors.
 - c. Set the alpha transparency to the desired percentage.

Note: Not all images will require you to set the alpha transparency. Generally, the value will be between 50-75%.
 - d. If necessary, resize the canvas to fit your image.
 - e. Customize the form, as described in [How to Customize the Form](#) on page 165.

- f. Export your image as a .gif or .png to preserve transparency.
- g. Place your image in \ibi\WebFOCUS82\config\web_resource\signin\images.

Procedure: How to Customize the Form

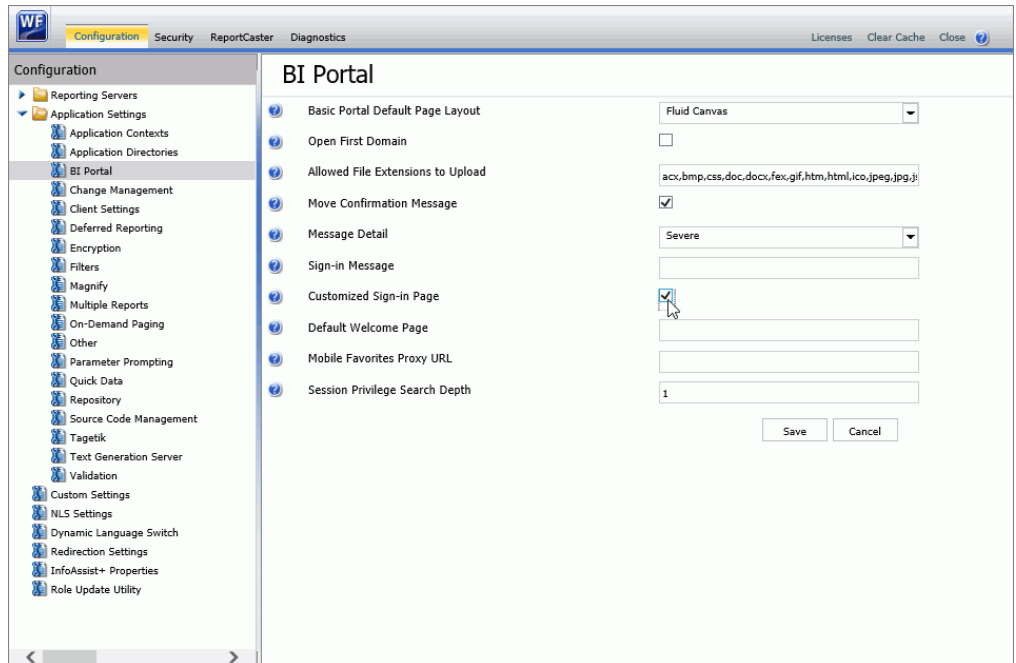
1. For the form background:
 - a. Change the background color of the Form Area Background object in the Form Layer to suit your color scheme.
 - b. Position the form background as desired. Depending on the text you edit in the next step, you may need to resize this box.
2. For the form elements:
 - a. Determine whether or not the Remember Me feature is used in your installation. If so, turn on the Remember element in the Form Layer.
 - b. Change the text, as needed in the Form Layer.
 - c. Style and position all form elements in the Form Layer.
3. For the error message:
 - a. Turn on the error message sublayer.
 - b. Style and position the error message background and text.
4. Turn off the Form Layer, as these items will be generated at run time.

Procedure: How to Enable the New Custom Sign-in Page

The last step is to enable the new page that you have created. Use the following steps to complete this task.

1. Sign in to WebFOCUS as an administrator.
2. Launch the WebFOCUS Administration Console.
3. Click the *Configuration* tab, expand the *Application Settings* folder, and click *BI Portal*.

4. Select the *Customized Sign-in Page* check box, as shown in the following image.



5. Click Save.
6. Sign out of WebFOCUS.

Setting the Text Labels

WebFOCUS provides you with the ability to change the text of all labels on the sign-in page. It also gives you the ability to include up to two custom links in the menu bar.

Procedure: How to Set the Text and Links

1. Browse to `\\ibi\\WebFOCUS82\\config\\web_resource\\signin\\`.
2. In a text editor, such as Notepad ++, edit the `customsignin.xml` file.
3. Change the text in the desired elements.

The following tables provide you with the element, XML tag name, and the default value for that element (which can be changed). The value you enter does not include the XML CDATA wrapper.

Note: If you do not see your changes in this section or the CSS section taking effect, you may need to clear the cache in your browser.

Main Page Elements	XML Tag	Default Value
Page Title	<signin_custom_page_title>	BI Portal Sign In
Menu Item 1 Text	<signin_menu_button1>	menu1
Menu Item 1 Link	<signin_menu_button1_link>	http://www.informationbuilders.com/
Menu Item 2 Text	<signin_menu_button2>	menu2
Menu Item 2 Link	<signin_menu_button2_link>	http://www.informationbuilders.com/
Frame (Form Area) Title	<signin_custom_frame_title>	Sign In to the BI Portal
User Name Label	<signin_user_name_label>	User Name:
Password Label	<signin_password_label>	Password:
Sign In Button Text	<signin_button>	Sign In
Remember Me Option	<remember_me_checkbox>	Remember me on this computer

Change Password Dialog Elements	XML Tag	Default Value
Title Text	<signin_custom_change_password_frame_title>	Change Password
User Name Label	<signin_change_password_user_name_label>	User Name
Old Password Label	<signin_change_password_old_password_label>	Old Password
New Password Label	<signin_change_password_new_password_label>	New Password
Confirm Password Label	<signin_change_password_confirm_password_label>	Confirm New Password
Sign In Button Text	<signin_change_password_sign_button>	Sign In
Cancel Button Text	<signin_change_password_cancel_button>	Cancel

Already Signed In Dialog Elements	XML Tag	Default Value
Title Text	<signin_custom_user-already-signin_frame_title>	User is already signed in
Message Text	<signin_custom_user-already-signin_message>	An active session for this user already exists. Would you like to continue to sign in, and cancel the other session?

Editing the CSS File to Position and Style Page Elements

You have flexibility when you lay out the custom sign-in page. Styling and positioning are done exclusively in CSS.

Procedure: How to Edit the CSS

1. Browse to \ibi\WebFOCUS82\config\web_resource\signin\
2. In a text editor, such as Notepad ++, edit the customsignin.css file.
3. Edit the desired elements.

Note:

- ☐ To test at any point, save and go to
http://server:port/ibi_apps/
- ☐ Ensure that your browser zoom is at 100%.
- ☐ Positioning and styling information for all elements can be obtained by selecting the corresponding element inside of your imaging editing software. You may need to slightly adjust the positioning.
- ☐ Image URLs are relative to the directory containing the CSS file (\ibi\WebFOCUS82\config\web_resource\signin\). The URL to that directory is
http://server:port/ibi_apps/web_resource/signin.

The following table provides the elements you can edit, their CSS class name, and suggested attributes you may want to change.

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Page Background Color	body, html	<p>Either Gradient or Solid:</p> <ul style="list-style-type: none"> <input type="checkbox"/> Gradient <ul style="list-style-type: none"> <input type="checkbox"/> Replace all instances of #064e96 with your start color. <input type="checkbox"/> Replace all instances of # ff7200 with your end color. <input type="checkbox"/> Solid <ul style="list-style-type: none"> <input type="checkbox"/> Delete the bottom eight lines of code in the body, html class, which read: <input type="checkbox"/> <code>background: -webkit-gradient(linear, 0 0, 0 100%, from(#064e96) to(#ff7200)); /</code> <code>*old webkit*/ background: -webkit-linear-gradient(#064e96, #ff7200); /</code> <code>*new webkit*/background: -moz-linear-gradient(#064e96, #ff7200); /</code> <code>*gecko*/</code>

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Page Background Color (<i>continued</i>)	body, html (<i>continued</i>)	<input type="checkbox"/> Solid (<i>continued</i>) <ul style="list-style-type: none"> <input type="checkbox"/> background: -ms-linear-gradient(#064e96, #ff7200); /*IE10*/ background: -o-linear-gradient(#064e96, #ff7200); /*opera 11.10+*/ background: linear-gradient(#064e96, #ff7200); /*future CSS3 browsers*/ -pie-background: linear-gradient(#064e96, #ff7200);behavior: url(web_resource/signin/PIE.htc); <input type="checkbox"/> Change the color in the remaining background attribute to your desired color.
Sign In Background Image	.signin-background-image	<input type="checkbox"/> Change the image <input type="checkbox"/> Set width to the image width <input type="checkbox"/> Set height to the image height
	.signin-box	<input type="checkbox"/> Set width to the image width <input type="checkbox"/> Set height to the image height Note: Top and left can be used to relatively center the image and all the controls, if desired.
Menu Bar Position	.signin-custom-menu-bar-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Menu Bar Styling	.signin-custom-menu-bar	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Menu Bar Separator Styling	.signin-menu-bar-separator	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on. <input type="checkbox"/> To hide the separator, set color to transparent.
Frame Title Position	.signin-custom-frame-title	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Frame Title Styling	.signin-custom-frame-label	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.
User Name Label Position	.signin-custom-username-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
User Name Label Styling	.signin-custom-username-label	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.
User Name Input Control Position	.signin-custom-username-editbox	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
User Name Input Control Styling	.signin-custom-username-editbox-input	<input type="checkbox"/> This controls styling, you should apply background colors here.
Password Label Position	.signin-custom-password-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Password Label Styling	.signin-custom-password-label	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.
Password Input Control Position	.signin-custom-password-editbox	<input type="checkbox"/> Set top <input type="checkbox"/> Set left

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Password Input Control Styling	.signin-custom-password-editbox-input	<input type="checkbox"/> This controls styling, you should apply background colors here.
Remember Me Option Position	.signin-custom-remember-me-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Remember Me Option Styling	signin-custom-remember-me	Set desired styling, such as font family, size, color, and so on.
Sign In Button Label Styling	.signin-button-label	Set desired styling, such as font family, size, color, and so on.
Sign In Button Position	.signin-custom-button-signin-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Sign In Button Styling	.signin-custom-button-signin	<input type="checkbox"/> Set border radius, size, and color <input type="checkbox"/> Set font
	.signin-button, .button	

Note: If you need to resize any objects, use the same class on which you set the position.

Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Position	.signin-custom-error-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Error Message Styling	.signin-custom-error-message	<input type="checkbox"/> Set desired styling, such as border radius, font family, size, color, and so on.

Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Image	.signin-custom-error-image	<input type="checkbox"/> Set the image <input type="checkbox"/> Uncomment the :visibility: hidden; line to hide the image, but keep the space it takes. Use display: none; to remove the image, including the space it occupies.

The styling of the elements in the following two tables are inherited from the main page elements. This means the buttons, labels, and controls match to the main page.

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-change-password-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left <input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.
Dialog Title Bar	.signin-custom-change-password-title-position	<input type="checkbox"/> Set background color
Dialog Title Label	.signin-custom-change-password-title-label	Set desired styling, such as font family, size, color, and so on.
Dialog Title Icon	.signin-custom-change-password-title-image	Set the image.
User Name Label Position	.signin-custom-change-password_username-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
User Name Input Control Position	.signin-custom-change-password_username-editbox-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Old Password Label Position	.signin-custom-change-password_old-password-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Old Password Input Control Position	.signin-custom-change-password_old-password-editbox-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
New Password Label Position	.signin-custom-change-password_new-password-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
New Password Input Control Position	.signin-custom-change-password_new-password-editbox-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Confirm New Password Label Position	.signin-custom-change-password_confirm-password-label-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Confirm New Password Input Control Position	.signin-custom-change-password_confirm-password-editbox-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Confirm New Password Input Control Position	.signin-custom-change-password_confirm-password-editbox-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Sign In Button Position	.signin-custom-change-password-button-signin-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Cancel Button Position	.signin-custom-change-password-button-cancel-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left

User Already Signed In Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-user-already-signin-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left <input type="checkbox"/> Set desired styling, such as font family, size, color, and so on.
Dialog Title Label	.signin-custom-user-already-signin-label-position	<input type="checkbox"/> Set desired styling, such as font family, size, color, and so on. <input type="checkbox"/> You may want to adjust left if you do not use an icon.
Dialog Title Icon	.signin-custom-user-already-signin-title-image	<input type="checkbox"/> Set the image <input type="checkbox"/> Delete the visibility: hidden; line to show the image.
Sign In Button Position	.signin-custom-user-already-signin-button-signin-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left
Cancel Button Position	.signin-custom-user-already-signin-button-cancel-position	<input type="checkbox"/> Set top <input type="checkbox"/> Set left

Procedure: How to Set the Text Labels

The following is a walkthrough, using the sample image, to implement a custom sign-in page. This assumes you have already performed the design and enable steps.

1. Browse to \jbi\WebFOCUS82\config\web_resource\signin\.
2. In a text editor, such as Notepad++, edit the customsignin.xml file.
3. Change the text in the following elements.

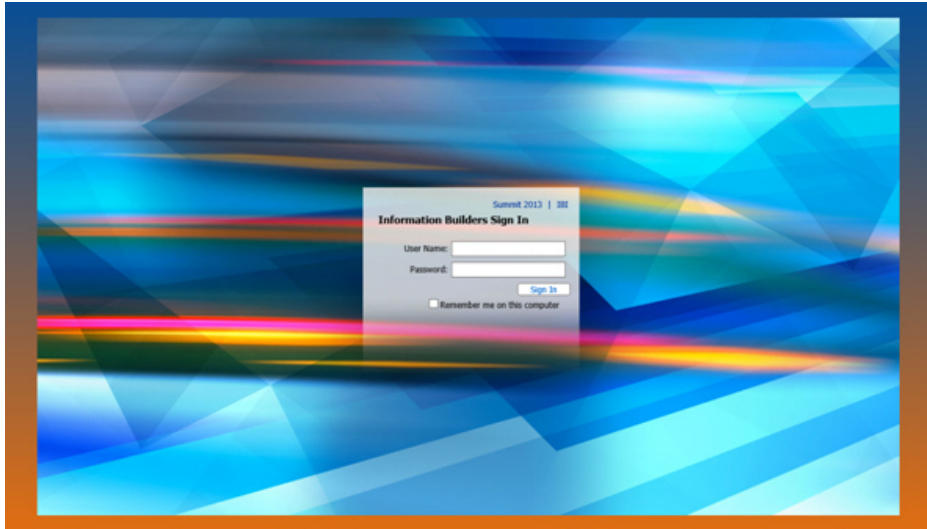
Note: The following table shows only the elements that changed in the example. Enter the value shown in the Example Value column into the XML file.

Main Page Elements	XML Tag	Example Value
Page Title	<signin_custom_page_title>	Information Builders Sign In
Menu Item 1 Text	<signin_menu_button1>	Summit 2013
Menu Item 1 Link	<signin_menu_button1_link>	http://www.informationbuilders.com/summit
Menu Item 2 Text	<signin_menu_button2>	IBI
Frame (Form Area) Title	<signin_custom_frame_title>	Information Builders Sign In
User Name Label	<signin_user_name_label>	Customer Name
Password Label	<signin_password_label>	Password
Remember Me Option	<remember_me_checkbox>	Remember me

Note: The Remember me option is not enabled by default, but is set in the example files, in case you enable it.

Change Dialog Elements	XML Tag	Example Value
User Name Label	<signin_change_password_user_name_label>	Customer Name:

4. Launch WebFOCUS in a browser. The following image appears:



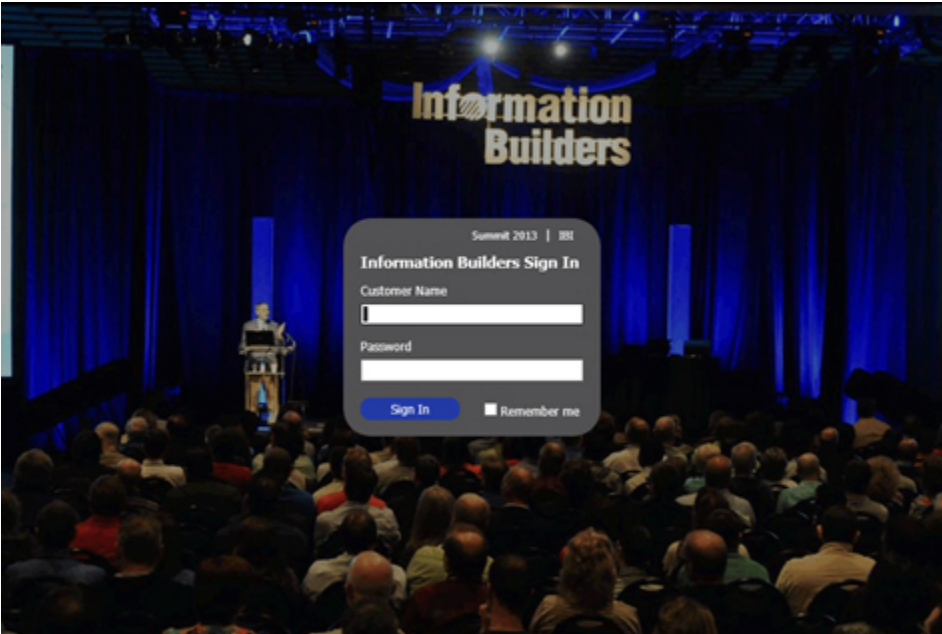
Procedure: How to Edit the CSS File

1. Browse to `\ibi\WebFOCUS82\config\web_resource\signin\`.
2. In a text editor, such as Notepad ++, edit the `customsignin.css` file.
3. Edit desired elements.

Note:

- ❑ To test at any point, save and go to
http://server:port/ibi_apps/
- ❑ Ensure that your browser zoom is at 100%.
- ❑ Positioning and styling information for all elements can be obtained by selecting the corresponding element inside of your imaging editing software. You may need to slightly adjust the positioning.
- ❑ Image URLs are relative to the directory containing the CSS file (`\ibi\WebFOCUS82\config\web_resource\signin\`). The URL to that directory is
http://server:port/ibi_apps/web_resource/signin.

The following tables contain the changes you need to make to style the sign-in page and two dialog boxes. Before each table is a screenshot of what you should see when you complete those changes.



Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Page Background Color	body, html	background: #000000; Delete all gradient lines.
Sign In Background Image	.signin-background-image	background-image: url("images/customsignin.gif"); width: 960px; height: 638px;
	.signin-box	width: 960px; height: 638px;

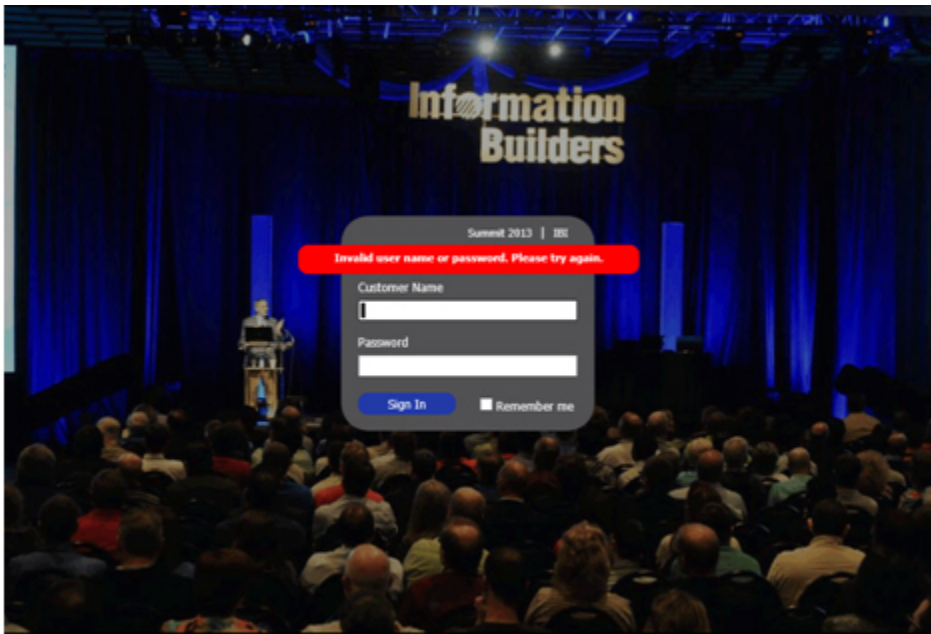
Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Menu Bar Position	.signin-custom-menu-bar-position	top: 220px; left: 475px;
Menu Bar Styling	.signin-custom-menu-bar	color: #ffffff; font: 11px Tahoma, Verdana, Arial, Sans-Serif;
Menu Bar Separator Styling	.signin-menu-bar-separator	color: #ffffff; This class is located at the bottom of the CSS file.
Frame Title Position	.signin-custom-frame-title	top: 245px; left: 370px;
Frame Title Styling	.signin-custom-frame-label	color: #ffffff;
User Name Label Position	.signin-custom-username-label-position	text-align: left; top: 275px; left: 370px;
User Name	.signin-custom-	color: #ffffff;
User Name Input Control Position	.signin-custom-username-editbox	width: 221px; top: 295px; left: 370px; Note: To show all edges properly, the width must be at least 5px.
User Name Input Control Styling	.signin-custom-username-editbox-input	width: 216px;

Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Password Label Position	.signin-custom-password-label-position	text-align: left; top: 330px; left: 370px;
Password Label Styling	.signin-custom-password-label	color: #ffffff; Delete font-size:12px;
Password Input Control Position	.signin-custom-password-editbox	width: 221px; top: 350px; left: 370px; Note: Width is 5px more than that of the control to show all edges.
Password Input Control Styling	.signin-custom-password-editbox-input	width: 216px;
Remember Me Option Position	.signin-custom-remember-me-position	width: 216px; top: 388px; left: 490px; Note: Top is 2px less than the value in the artwork, due to HTML rendering. Width and left are matched to the input controls, with right text alignment to align right edge.
Remember Me Option Styling	signin-custom-remember-me	color: #ffffff; font-size:12px;
Sign In Button Position	.signin-custom-button-signin-position	color: #ffffff;

Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Sign In Button Styling	.signin-custom-button-signin	color: #ffffff; border: 1px solid #223AA7; border-radius: 10px;
Sign In Button Styling	a.signin-custom-button-signin	background-color: #223AA7; width: 96px; Delete background line. Delete padding-right line.
	a.signin-custom-button-signin span	padding: 3px 0px 3px 0px; Delete line-height line.

Error Message

The following image and table provide information on resolving error messages.



Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Background Styling & Position	.signin-custom-error-position	width: 340px; height: 27px; top: 240px; left: 310px; background-color: #ff0000; border: 1px solid #ff0000; border-radius: 10px; behavior: url(web_resource/signin/PIE.htc);
Error Message Text Styling & Position	.signin-custom-error-message	color: #ffffff; font-size: 11px; top: 5px; width: 340px; text-align: center; Delete left: 20; Note: Top is the difference between the top of the box and the top of the text in your image editing software. Width here must match the width of class above.
Error Message Image	.signin-custom-error-image	display: none; Note: This was done to have no image.

Note: If you need to resize any objects, use the same class on which you set the position.

Change Password Dialog Box

Styling of elements in the Change Password dialog box, as well as the Already Signed in dialog box, are inherited from the main page elements. This means that the buttons, labels, and controls match to the main page.

The following image and table provide information on changing passwords.

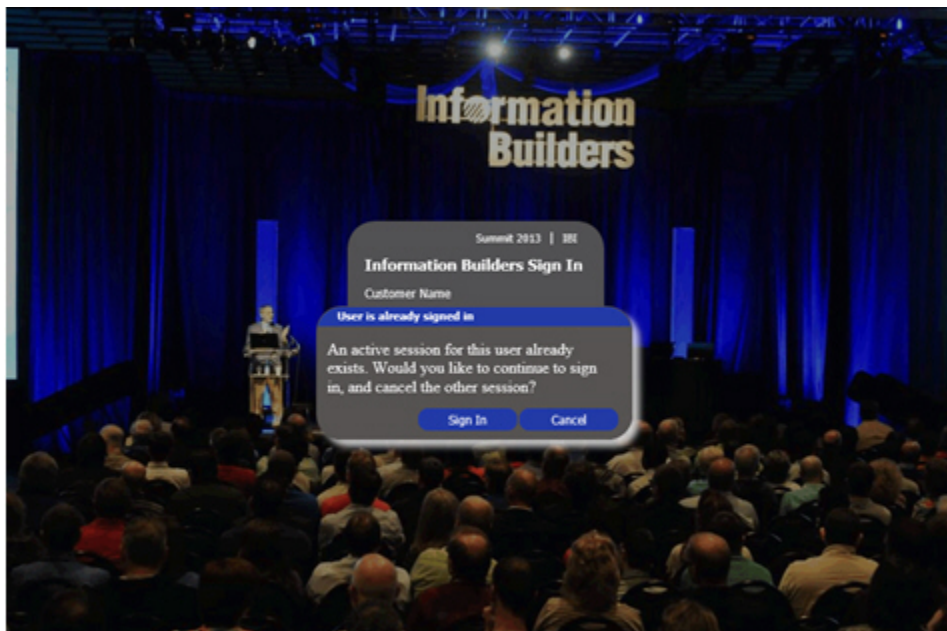


Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-change-password-position	top: 220px; left: 353px; background-color: #565352; color: #ffffff; border: 1px solid transparent; border-radius: 25px; -webkit-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); -moz-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); behavior: url(web_resource/signin/PIE.htc); Note: The visibility: hidden; line will need to be deleted, added again, or commented out during testing.
Dialog Title Bar	.signin-custom-change-password-title-position	background-color: #223AA7;
Dialog Title Icon	.signin-custom-change-password-title-image	visibility: hidden;
Sign In Button Position	.signin-custom-change-password-button-signin-position	height: 25px; top: 190px; left: 100px;

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Cancel Button Position	.signin-custom-change-password-button-cancel-position	height: 25px; top: 190px; left: 200px;

Already Signed In Dialog Box

The following image and table provide information on working with the Already Signed In dialog box.



Already Signed In Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-user-already-signin-position	height: 130px; top: 305px; left: 332px; background-color: #565352; border: 1px solid transparent; border-radius: 25px; -webkit-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); -moz-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75); behavior: url(web_resource/signin/PIE.htc); Note: The visibility: hidden; line will need to be deleted, added again, or commented out during testing.
Dialog Title Label	.signin-custom-user-already-signin-label-position	width: 270px; color: #ffffff;
Dialog Title Icon	.signin-custom-user-already-signin-title-image	visibility: hidden;
Sign In Button Position	.signin-custom-user-already-signin-button-signin-position	height: 25px; top: 100px; left: 100px;
Cancel Button Position	.signin-custom-user-already-signin-button-cancel-position	height: 25px; top: 100px; left: 200px;

Enhancing Portals Using Interactive Features and Coding Techniques

You can use interactive features and coding techniques that are available in WebFOCUS to customize your portal. These interactive features enable you to drill-down to specific data sets, exclude data from analysis, navigate to the precise point in your content, highlight critical information, as well as use coding techniques to override the default behavior.

This topic outlines how you can use interactive features and coding techniques to customize your portal.

In this chapter:

- ☐ [Creating Filtered Dashboard Pages](#)
 - ☐ [Using a JavaScript Function to Navigate to a Portal Page](#)
 - ☐ [Advanced Coding Techniques and Coding Considerations](#)
-

Creating Filtered Dashboard Pages

In Release 8.2 Version 01, App Studio has a new Filter Panel option in the Requests & Data Sources tab, which lets you pick the Reporting Object and then streamlines the workflow for creating a filter panel to be used in a portal. This includes setting up a responsive layout with a single row of filter controls. It also sets the Load in iFrame Object property on the file to *No*, so that the portal creates an HTML DIV for the filter panel instead of an iFrame. This is important so that custom jQuery controls on the filter panel, such as the multi-select drop-down list and the calendar control, will be able to overlap the filter panel boundary.

An example of a filtered dashboard page, displayed on multiple devices, is shown in the following image.



To build a filtered dashboard page, you need to perform the following steps.

- ❑ **Step One.** Create a Reporting Object and populate it with parameters.
- ❑ **Step Two.** Create parameterized analytical content, such as a parameterized report, using the same Reporting Object.
- ❑ **Step Three.** Build filter controls in App Studio.
- ❑ **Step Four.** Combine parameterized content and the filter panel in a responsive portal.

Step One: Creating a Parameterized Reporting Object

In this step, you create a Reporting Object and populate it with the Where statements that you will use for building a filter panel.

Procedure: How to Create a Parameterized Reporting Object

1. Create a Reporting Object using the wf_retail_lite Master File.
2. In the Reporting Object tool, right-click *Where Statements* and click *New*.

The Create a filtering condition dialog box opens.

3. Create WHERE statements that you will use as parameters in a filter panel. In this example, we are creating the following five WHERE statements.

- ☐ Store,Business,Region Equal to Optional Static Parameter
- ☐ Product,Category Equal to Optional Multiselect Parameter
- ☐ Store Type Equal to Optional Static Parameter
- ☐ Sale,Date Greater than or equal to Optional Simple Parameter
- ☐ Sale,Date Less than or equal to Optional Simple Parameter

Follow the steps below to create these.

Store,Business,Region Equal to Optional Static Parameter

- a. Set the Field to *Store,Business,Region*, set the expression to *Equal to*, and set the Value to *Parameter*.
- b. Select the *Static* radio button, and then select the *Optional* check box.
- c. In the Value field, type *_FOC_NULL*, and click the *Add to List* button.
- d. Click *Get Values* and then click *All*.
- e. Multi-select all values and click the *Add to List* button.
- f. Click *OK*.

Product,Category Equal to Optional Multiselect Parameter

- a. Click *New Filter*.
- b. Set the Field to *Product,Category*, set the expression to *Equal To*, and set the Value to *Parameter*.
- c. Select the *Dynamic* radio button, and then select the *Optional* check box.
- d. Select the *Select multiple values at runtime* check box.
- e. Click *OK*.

Store Type Equal to Optional Static Parameter

- a. Click *New Filter*.
- b. Set the Field to *Store,Type*, set the expression to *Equal To*, and set the Value to *Parameter*.
- c. Select the *Static* radio button, and then select the *Optional* check box.
- d. In the Value field, type *_FOC_NULL*, and click the *Add to List* button.
- e. Click *Get Values* and then click *All*.

- f. Multi-select all values and click the *Add to List* button.
- g. Click *OK*.

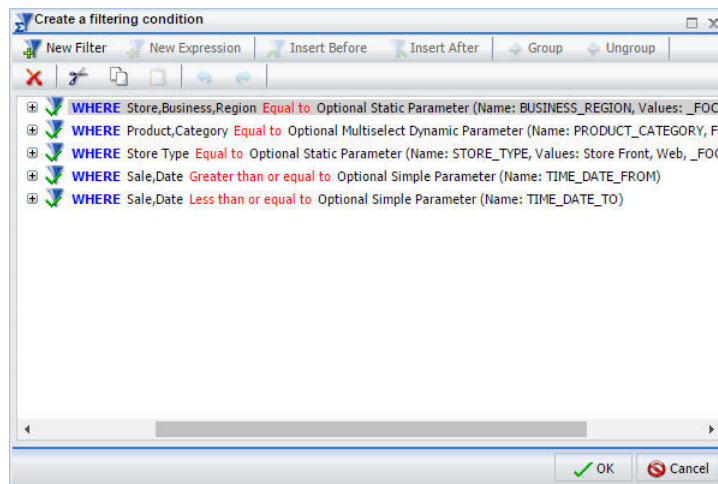
Sale,Date Greater than or equal to Optional Simple Parameter

- a. Click *New Filter*.
- b. Set the Field to *Sale,Date*, set the expression to *Greater than or equal to*, and set the Value to *Parameter*.
- c. Select the *Simple* radio button, and then select the *Optional* check box.
- d. Click *OK*.

Sale,Date Less than or equal to Optional Simple Parameter

- a. Click *New Filter*.
- b. Set the Field to *Sale,Date*, set the expression to *Less than or equal to*, and set the Value to *Parameter*.
- c. Select the *Simple* radio button, and then select the *Optional* check box.
- d. Click *OK*.

The following image shows the completed WHERE statements.



4. Click *OK* to close the Create filtering condition dialog box.
5. Save and close the Reporting Object tool.

Step Two: Creating Parameterized Content Using a Reporting Object

In this step, you use your newly created Reporting Object to generate analytical content. This procedure provides a fast and easy way to ensure the uniformity of the parameters used across the content.

Procedure: How to Create Content Using a Reporting Object

1. Edit the Reporting Object that you created in the previous step, by creating a new report or chart.

InfoAssist opens. The Master File that you used to build your reporting object is automatically selected.

2. Drag fields of your choice from the Data pane to the Query pane to build a report or chart.
3. Save your item and close InfoAssist.

Note: Repeat these steps to create more content.

Step Three: Building Filter Controls

In this step, you create an HTML document with the filter controls that can be used to filter content on a page.

Procedure: How to Build Filter Controls in App Studio

1. Launch WebFOCUS App Studio.
2. In the Environments tree, right-click a domain or folder, point to *New*, and then click *HTML/Document*.

The HTML/Document Wizard opens.

3. Click *Next*.

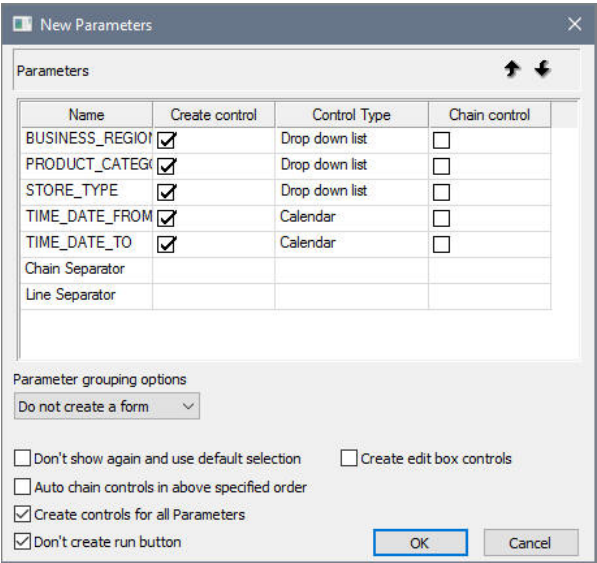
The Templates, Settings, and Themes screen appears.

4. Keep the default settings and click *Finish*.
5. In the Requests & Data Sources panel, click the arrow next to the *New* button, and then click *Requests->Parameters->Filter Panel*.

The Open File dialog box opens.

6. Navigate to the reporting object that you created in Step 1 and click *OK*.

The New Parameters dialog box opens, as shown in the following image.



- Right-click the control type for the STORE_TYPE field and select *Radio Button* from the list of options.
- Keep the remaining default options and click *OK*.

The filter controls appear in the HTML canvas.

- Perform the following actions to visually streamline the controls:
 - Multi-select two date fields, right-click either one of them, point to *Html object manipulation*, and then click *Merge containers*.
 - Change *_FOC_NULL* to *All* wherever applicable. To do so, select a control, open the Settings panel, double-click the Display value and modify the entry.
 - Optionally, edit the titles of the controls. To do so, double-click the title of a control and modify the entry.

An example of completed filter controls is shown in the following image.



- In the Tasks & Animations panel, under Tasks, click the *New* button.
- From the Trigger Type drop-down list, select *Selection Changed*.
- In the Trigger Identifier field, select check boxes next to all controls.

13. In the Requests/Actions section, click the arrow next to the *Requests Selections* button, and then click *Refresh*.

The Target type automatically changes to *Refresh BI Portal* and the *Current page only* radio button is automatically selected.

14. Save the page and close the App Studio.

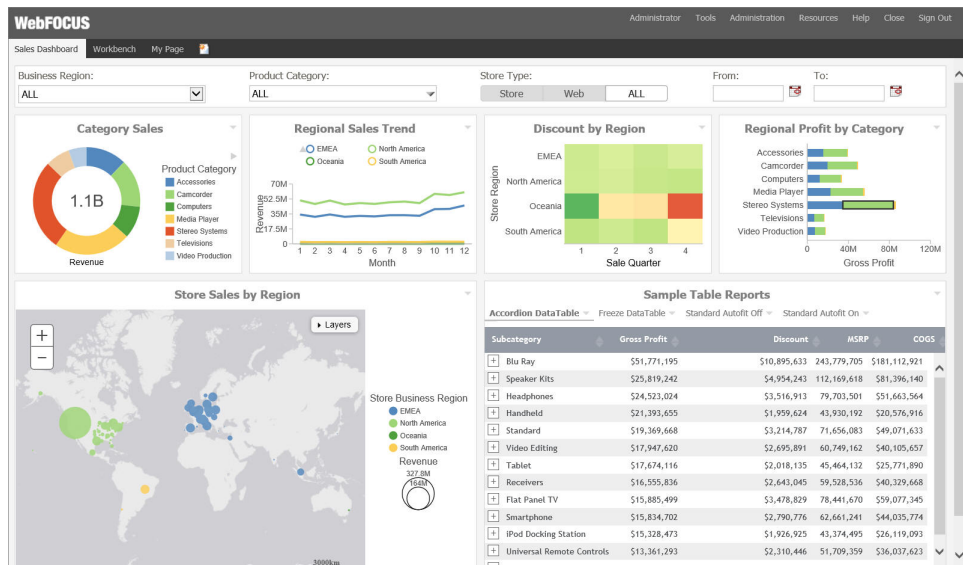
Step Four: Combining the Filter Panel and the Content

In this step, you build a responsive portal page and add your new filter panel to create a filtered dashboard.

Procedure: How to Use a Filter Panel in a Portal

1. Create a new basic or collaborative portal and build a responsive portal page.
2. Add your new filter panel to the responsive portal page, as described in [Building a Basic Responsive Portal](#) on page 139.
3. Once you finished customizing your filtered dashboard page, click Save and close the Portal Designer.
4. Run the portal.

The completed filtered dashboard page at run time is shown in the following image.



5. Manipulate the filter controls to see the content refresh, change the browser width to observe the responsive behavior.

6. Optionally, publish your portal to make it available to other users and groups.

Using a JavaScript Function to Navigate to a Portal Page

You can use a JavaScript function to dynamically navigate to portal pages and reports within your portal. This feature is especially useful in portals with multiple portal pages, because it allows you to link to a specific item or point in your content. You can also pass a parameter from a link to its output, such as a chart or report.

To create the Navigate to Page function, you need to perform the following steps:

1. **Create Hyperlinks in a Report.** Create hyperlinks within a report, which you will later configure to point to a page and parameterized content.
2. **Create Parameterized Content.** Create charts and reports to which the links will point.
3. **Set Up a Portal for the Navigate to Page Function.** Create the landing page for the links.
4. **Configure Hyperlinks.** Specify the output location for the links.

Step One: Creating Hyperlinks

In this step, you will create a simple report with hyperlinks, which you will later configure to point at a specific output in a portal.

Procedure: How to Create Hyperlinks in a Report

1. Sign-in to WebFOCUS as a developer or administrator.
2. Launch InfoAssist in report mode.
3. Select a data source file and click *OK*.
4. Drag fields from the Data pane onto the canvas or into the Query pane to create a report.

For more information on how to create a basic report, see the *Creating and Customizing Reports* chapter, in the *WebFOCUS InfoAssist User's Manual*.

5. Click the field that you want to use for the Navigate to Page function to highlight it.
6. On the *Field* tab, in the *Links* group, click *Drill Down*.

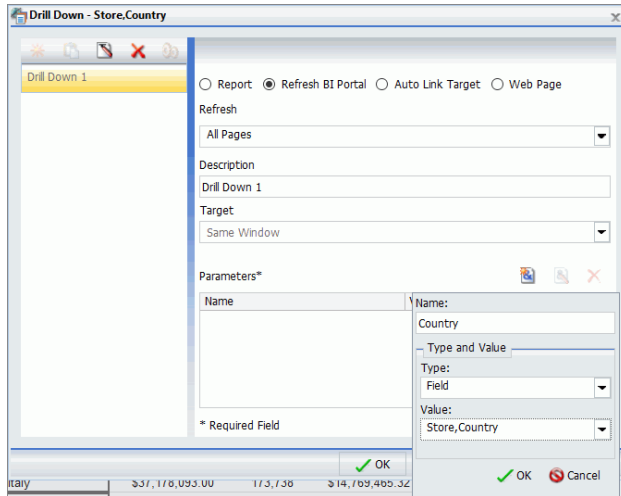
The Drill Down dialog box opens.

7. Select the *Refresh BI Portal* radio button.
8. From the Refresh list, click *All Pages*.
9. Click the *Add Parameter* button.
10. Type a name for the parameter.

Note: Remember the name of the parameter. You will use it in the subsequent steps.

11. In the Type list, click *Field*.
12. In the Value list, click the field that you have highlighted, and then click *OK*.

The following image shows the example of the Drill Down dialog box, where *Country* is the name of the parameter.



13. Click *OK*.

The hyperlinks are added to the entries of the highlighted field.

Note: The links remain inactive and evoke no error messages until the target value is configured.

14. Save the report.

Step Two: Creating Parameterized Content

In this step, you build parameterized reports and charts that will serve as outputs for your links.

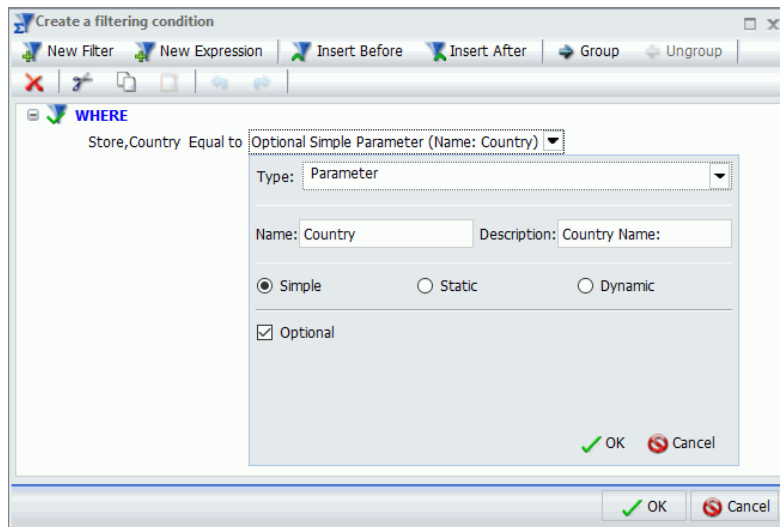
Procedure: How to Create Parameterized Content for Hyperlinks

1. From InfoAssist, click the application button, then click *New*.
Click *Build a Report*.
2. Select the same data source file that you used for the initial report, and then click *OK*.
3. Drag fields from the Data pane onto the canvas or into the Query pane to create a report.
4. On the *Data* tab, in the *Filter* group, click *Filter*.

The Create a filtering condition dialog box opens.

5. Double-click the *Double-click or press F2 to edit!* text.
6. Set the following values:
 - a. In the Field drop-down list, click the same field for which you have created hyperlinks in the previous report.
 - b. Keep the Equal To default value.
 - c. In the Value dialog box, set Type to *Parameter*, keep the Simple radio button selected, and type the name of the parameter that matches the parameter in the initial report, select the *Optional* check box, and then click *OK*.

The following image shows an example of the filtering condition, where *Country* is the name of the parameter.



7. Click *OK*.
8. Save the second report and close WebFOCUS InfoAssist.
9. Repeat steps 1-8 to create more content.

Step Three: Setting Up a Portal for the Hyperlinks

In this step, you will create a landing page for the hyperlinks and incorporate the report that you created in Step Two, to a Portal.

Procedure: How to Set Up a Portal for the Hyperlinks

1. Create a new basic or collaborative portal.

2. In the Portal Designer, create a new page and note the Page Name value.
Note: In a collaborative portal, the Page Name value is displayed in the Add Page window. In a basic portal the Page Name value is displayed in the Properties panel. You can also see the Page Name value in if you hover over any portal in the Resources tree.
3. Right-click the page canvas, and then click *Page Layout*.
 The Choose a Layout dialog box opens.
4. Select the layout type for your page.
 In this example, we select Two Column layout.
5. Click the first column.
6. On the *Insert* tab, in the *Containers* group, click *Panel*.
 A Panel container is inserted inside the first column.
7. Click the container to select it.
8. In the Properties panel, on the Content tab, view and remember the value of the WebFOCUS Resources field. This value will be used in the subsequent steps.
9. Repeat steps 6-8 for the other columns.
10. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.
 The Resources tree opens.
11. Drag the report with hyperlinks to the Page 1 canvas.
12. Drag the remaining content to the panels on Page 2.

Step Four: Configuring Hyperlinks

In this step, you edit the report containing hyperlinks to specify the output location.

Procedure: How to Configure Hyperlinks

1. Open the initial report in the Text Editor.
2. Navigate to the line that contains the following code: `JAVASCRIPT=drillRefresh`.
3. Change `drillRefresh` to `navigateToPage`, change `AMPERS_PORTAL` to the name of the landing page, and specify names of the panels, separated by spaces. Ensure that you enclose these entries in single quotation marks.

An example of modified syntax should look similar to this:

```
JAVASCRIPT=navigateToPage('page1' 'panel1 panel2' 'Country'
WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME)
```

where:

navigateToPage

Is the JavaScript function.

page1

Is the name of the landing page.

Note: This value is case sensitive. You can only have one landing page.

panel1 panel2

Are the names of the panels with parameterized content.

Country

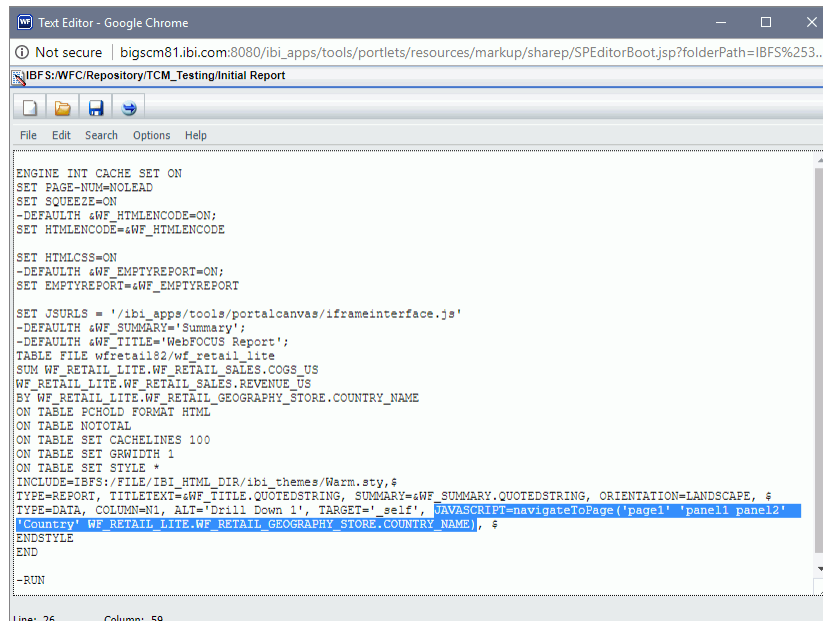
Is the name of the parameter that is being passed from the hyperlinks.

Note: The panels added to this syntax will be refreshed once you click the hyperlink. This behavior can be changed at any time by adding panel names to or removing them from this syntax. This allows you to choose which content gets refreshed on the landing page.

WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME

Is the database entry which is tied to the parameter alias.

The following image shows an example of modified syntax.



```
ENGINE INT CACHE SET ON
SET PAGE-NUM=NOLEAD
SET SQUEEZE=ON
-DEFAULTH &WF_HTMLENCOD=ON;
SET HTMLENCODE=&WF_HTMLENCOD

SET HTMLCSS=ON
-DEFAULTH &WF_EMPTYREPORT=ON;
SET EMPTYREPORT=&WF_EMPTYREPORT

SET JSURLS = '/ibi_apps/tools/portalcanvas/iframeinterface.js'
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE wfretail12/wf_retail_lite
SUM WF_RETAIL_LITE.WF_RETAIL_SALES.COGS US
WF_RETAIL_LITE.WF_RETAIL_SALES.REVENUE US
BY WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME
ON TABLE PCOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET CACHELINES 100
ON TABLE SET GRWIDTH 1
ON TABLE SET STYLE *
INCLUDE=IBFS:/FILE/IBI_HTML_DIR/ibi_themes/Warm.sty,$
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING, SUMMARY=&WF_SUMMARY.QUOTEDSTRING, ORIENTATION=LANDSCAPE, $
TYPE=DATA, COLUMN=N1, RLT='Drill Down 1', TARGET='_self', NAVASCRIP=navigateToPage('page1' 'panel1 panel2'
'Country' WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME), $
ENDSTYLE
END
-RUN
```

4. Click Save and close the Text Editor.

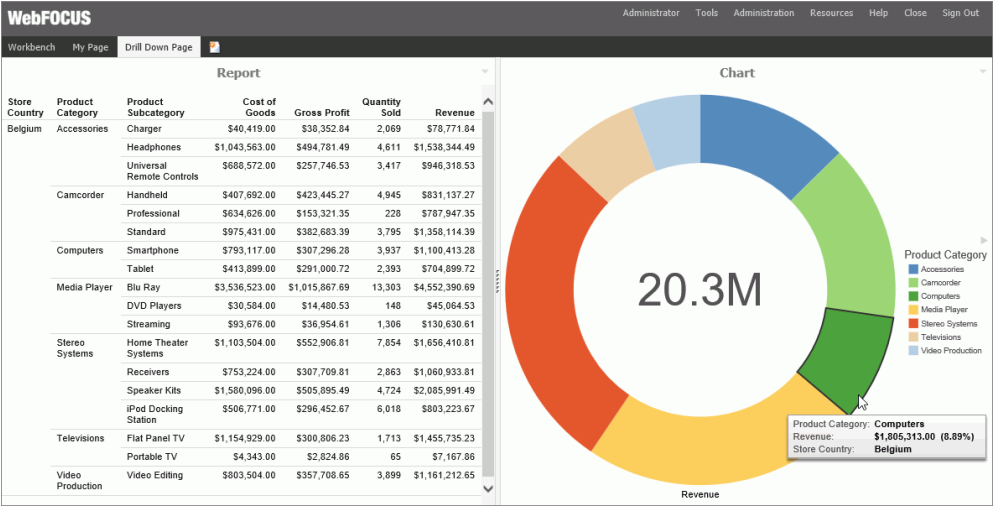
5. Optionally, customize your portal to achieve the desired style and layout.
6. Click the Save button and close the Portal Designer.
7. Run your new portal.
8. At run time, click any link on the first page of the portal.

The second portal page displays, and the content refreshes to show the correct data.

Note: If you navigate to a portal page that has changed, you will not receive an error message, and must ensure that your syntax values are set correctly.

The following images show the Navigate to Page function at run time.

Drill Down Report ▾				
Store Country	Product Category	Cost of Goods	Gross Profit	Quantity Sold
Australia	Accessories	\$105,032.00	\$48,343.30	592
	Camcorder	\$98,874.00	\$56,348.60	554
	Computers	\$117,446.00	\$51,035.59	526
	Media Player	\$234,889.00	\$69,788.82	984
	Stereo Systems	\$238,755.00	\$98,299.74	1,265
	Televisions	\$61,989.00	\$19,037.50	94
	Video Production	\$41,764.00	\$18,704.74	227
Belgium	Accessories	\$1,772,554.00	\$790,880.86	10,097
	Camcorder	\$2,017,749.00	\$959,450.01	8,968
	Computers	\$1,207,016.00	\$598,297.00	6,330
	Media Player	\$3,660,783.00	\$1,067,302.83	14,757
	Stereo Systems	\$3,943,595.00	\$1,662,964.78	21,459
	Televisions	\$1,159,272.00	\$303,631.09	1,778
	Video Production	\$803,504.00	\$357,708.65	3,899



Advanced Coding Techniques and Coding Considerations

This section describes how to use the -INCLUDE command to insert a report procedure (FEX) or style sheet file (STY) within another report procedure (FEX). It also describes how to use the -MRNOEDIT command to ignore code in a procedure (FOCEXEC).

Execution of a Report Procedure or Style Sheet File Using -INCLUDE

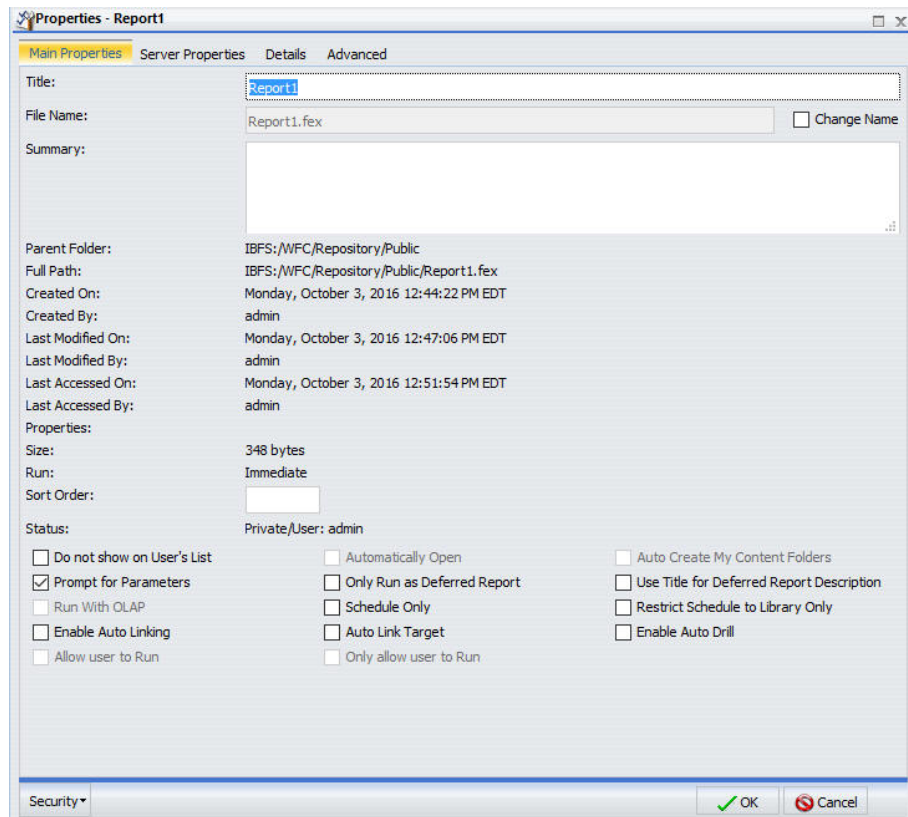
Using the -INCLUDE command, you can insert a report procedure (FEX) or style sheet file (STY) within another report procedure (FEX). For information on creating report requests and creating style sheet files, see the *Creating Reports with WebFOCUS Language* manual.

When you create a report procedure in the repository content folder path, a unique path and file name reference is created, based on the folder the report is created in and the file name and type specified. Note that there are file naming rules that replace most non-alphanumeric characters and modify the file name, when necessary.

The full path is the value to specify when referencing a report procedure or style sheet file in a -INCLUDE command. The full IBFS path information, including file name, can be obtained by selecting the report and then selecting the *Properties* option.

Note: WebFOCUS 7.x report procedures migrated with -INCLUDE commands, coded with the 7.x Managed Reporting Repository Internal HREFs, are supported in WebFOCUS 8. This is because the WebFOCUS 7.x internal HREF references are migrated with the properties information for an item (for example, a report or style sheet file). Items created in WebFOCUS 8 must be referenced by their full IBFS path.

The following image shows the Properties dialog box for a report procedure (FEX) with the full path.



Syntax: How to Incorporate a Report Procedure (FEX) or Style Sheet File (STY) With -INCLUDE

The following code illustrates how to incorporate a report procedure (FEX) using IBFS path with -INCLUDE command.

Note: A procedure or style sheet file that is located on a Reporting Server can be incorporated into a Managed Reporting procedure using the -MRNOEDIT command prior to the -INCLUDE command.

```
-INCLUDE IBFS:/path/filename
```

where:

IBFS:/path/filename

Is the full path, including filename, of the report procedure (FEX) or filename.sty of the style sheet file. The file extension is optional when a report procedure (FEX) is referenced.

To incorporate a procedure on a Reporting Server using -MRNOEDIT and -INCLUDE, enter the following:

```
-MRNOEDIT -INCLUDE appname/filename.ext
```

where:

appname

Is the application directory path on the Reporting Server in which the server procedure (FEX) or style sheet file (STY) is located. If this is not specified, the file must be on the application path of the Reporting Server.

filename.ext

Is the name of the procedure located on the Reporting Server. The file extension is optional when a report procedure (FEX) is referenced. When incorporating a style sheet file, specify the STY extension.

Reference: Including a Reporting Server Procedure or Style Sheet File in a Managed Reporting Procedure Using an IBFS Path

To incorporate a procedure located in an application directory on a Reporting Server using the WebFOCUS IBFS path, enter:

```
-INCLUDE IBFS://EDA/nodename/appname/filename.ext
```

where:

nodename

Is the Reporting Server node defined in the WebFOCUS Client configuration. The IBFS://EDA/ path specifies that the procedure or style sheet file is located on a Reporting Server. Managing Reporting processing removes IBFS://EDA/nodename from the Managed Reporting request when submitting the request to the Reporting Server because the Reporting Server processing will use its application path to locate the procedure or style sheet file.

appname

Is the application directory on the Reporting Server in which the server procedure or style sheet file is located. If this is not specified, the file must be on the application path of the Reporting Server.

filename.ext

Is the name of the procedure or style sheet file located on the Reporting Server. The file extension is optional when a report procedure (FEX) is referenced. When incorporating a style sheet file, specify the STY extension.

Reference: How to Include a Reporting Server Procedure or Style Sheet File in a Managed Reporting Procedure Using -MRNOEDIT and -INCLUDE

A best practice in WebFOCUS 8 application development is to centralize report styling and environmental setup, such as JOINS and DEFINES, by storing them in a common domain and defining security permissions to permit users to read and run them, but not edit or change them. However, applications may require referencing report procedures and style sheet files that are located in an application directory on the Reporting Server. The information in this section is for legacy applications that have been migrated.

The following is an example of incorporating a Reporting Server procedure or a style sheet file within a Managed Reporting procedure using the -MRNOEDIT and -INCLUDE command.

The salesrptsetup procedure, containing the following commands to create a field commonly used in the product sales reports, is located in the /ibi/apps/ibisamp directory on the Reporting Server.

```
DEFINE FILE GGSales
PROFIT/D12.3= DOLLARS - BUDDOLLARS;
INVENTORY/D12 = UNITS - BUDUNITS;
END
```

The salesrptstyle.sty style sheet containing the following styling commands, is located on the Reporting Server in the /ibi/apps/ibisamp directory.

```
TYPE=REPORT,COLOR=NAVY,Font='ARIAL',SIZE=9,GRID=OFF,$
TYPE=HEADING,LINE=1,STYLE=BOLD,SIZE=12,JUSTIFY=Center,$
TYPE=TITLE,BACKCOLOR=RGB(45 111 205),COLOR=WHITE,STYLE=UNDERLINE+BOLD,$
TYPE=DATA,BACKCOLOR=(WHITE RGB(235 235 255)),$
TYPE=SUBTOTAL,BACKCOLOR=RGB(163 200 236),STYLE=BOLD,$
```

The Managed Reporting procedure incorporates the salesrptsetup procedure and salesrptstyle style sheet located on the Reporting Server.


```

-MRNOEDIT -INCLUDE ibisamp/salesrptsetup
TABLE FILE GGSales
"Regional Inventory and Profit Report"
SUM BUDUNITS UNITS INVENTORY AS 'Inventory'
BUDDOLLARS DOLLARS PROFIT AS 'Profit'
BY REGION
BY CATEGORY
-MRNOEDIT -INCLUDE ibisamp/salesrptstyle.sty
END

```

PAGE 1

Regional Budget and Sales Report

Region	Category	Budget Units	Unit Sales	Inventory	Budget Dollars	Dollar Sales	Profit
Midwest	Coffee	335526	332777	-2,749	4086032	4178513	92,481.000
	Food	339263	341414	2,151	4220721	4338271	117,550.000
	Gifts	232318	230854	-1,464	2887620	2883881	-3,739.000
Northeast	Coffee	335920	335778	-142	4252462	4164017	-88,445.000
	Food	351431	353368	1,937	4453907	4379994	-73,913.000
	Gifts	227008	227529	521	2870552	2848289	-22,263.000
Southeast	Coffee	355693	350948	-4,745	4431429	4415408	-16,021.000
	Food	351509	349829	-1,680	4409288	4308731	-100,557.000
	Gifts	235045	234455	-590	2967254	2986240	18,986.000
West	Coffee	358784	356763	-2,021	4523963	4473517	-50,446.000
	Food	335361	340234	4,873	4183244	4202337	19,093.000
	Gifts	236636	235042	-1,594	2934306	2977092	42,786.000

Reference: Considerations When Using -INCLUDE With ReportCaster

From the Reporting Server, for each task within a schedule, ReportCaster supports receiving a single answer set, such as report, chart, or HTML file. Therefore, when using -INCLUDE to incorporate a procedure into a procedure that will be scheduled with ReportCaster, only one answer set should be created. If you need to distribute multiple reports within a single document, use the Compound Report feature. For more information, see the *Creating Reports With WebFOCUS Language* manual.

Ignoring Code in a Procedure (FEX)

You can instruct Managed Reporting to not process single lines or blocks of code using the -MRNOEDIT tag.

Syntax: How to Ignore Code in a Procedure (FOCEXEC)

To instruct Managed Reporting to not process code, use the following:

For a single line of code:

```
-MRNOEDIT focexec_code
```

For multiple lines of code:

```
-MRNOEDIT BEGINfocexec_code  
-MRNOEDIT END
```

Note: Both lowercase and uppercase syntax are supported for the -MRNOEDIT tag. The *focexec_code* must fit on the same line.

The syntax above is not part of the FOCUS language. It is used only by Managed Reporting.

Managed Reporting will not process the lines when evaluating the Managed Reporting procedure prior to sending it to the Reporting Server. The lines of code will be passed without the -MRNOEDIT tags to the Reporting Server.

By design, amper variables specified within the -MRNOEDIT tags are resolved by Managed Reporting. You should clear the procedure property, *Prompt for Parameters*, if you do not want to be prompted for parameter values when:

- ☐ Running a procedure immediately.
- ☐ Running a procedure deferred.
- ☐ Scheduling a procedure.

You must also set the *Managed Reporting when Prompt Parameters Property Unset* to Off. For more information, see the *WebFOCUS Security and Administration* manual.

Reference: Using -MRNOEDIT to Instruct Managed Reporting to Ignore Lines of Code

Both lowercase and uppercase syntax are supported for the -MRNOEDIT tag.

```
-MRNOEDIT -INCLUDE salesrptstyle.sty
```

Managed Reporting ignores the -INCLUDE salesrptstyle.sty command. Without the -MRNOEDIT tag, this would result in retrieval of the FOCEXEC from the WebFOCUS Repository. In this case, the -INCLUDE is resolved on the Reporting Server. Therefore, salesrptstyle.sty should reside on the path of the Reporting Server.

```
TABLE FILE GGSales
"Regional Inventory and Profit Report"
SUM BUDUNITS UNITS INVENTORY AS 'Inventory'
BUDDOLLARS DOLLARS PROFIT AS 'Profit'
BY REGION
BY CATEGORY
-MRNOEDIT -INCLUDE salesrptstyle.sty
END
```


Working With Alerts

In the business climate today, cutting costs and increasing profitability are critical. Organizations create and distribute reports for evaluating and taking action when management-defined conditions are not met. The evaluation can largely be automated using Alert reporting.

Alert reporting automates the evaluation of a defined condition to determine whether or not a report should be submitted. Recipients of the report know before they open it that they are receiving this report because there is an exception in their area of responsibility. This topic introduces and describes how you can create Alerts in WebFOCUS.

In this chapter:

- ☐ [Alert Reporting](#)
 - ☐ [Components of an Alert](#)
 - ☐ [Creating and Scheduling an Alert](#)
 - ☐ [Checking Scheduled Alerts](#)
 - ☐ [Using Sample Data to Create and Schedule an Alert](#)
-

Alert Reporting

A data-driven Alert is an event that is prompted by a guideline that you define. This guideline can vary from the simple to the complex. For example, a simple guideline is to alert a sales manager when an order that exceeds \$1 million is entered. An example of a more complex guideline is to alert a department manager when cumulative expenses exceed budget for any category. The report sent to the manager as a result of the Alert might show the most recent transactions, the amounts, and the sources.

Alert reporting is an integrated feature of WebFOCUS Managed Reporting and ReportCaster. An Alert report can be run interactively or by authorized users. You can use ReportCaster to schedule and distribute an Alert report. Burst capability can send targeted information to the people who need it, so that there is less information for each person to analyze.

Alerts work with all email clients. They are supported on the following mobile devices: iPhone®, iPad®, and email enabled mobile phones. Alerts can also be sent to any PC or laptop computer with email capability.

Alerts provide the following:

- ❑ **Alert tools.** Using Alert Assist, you can quickly set up test conditions (rules) that determine if an Alert condition should be triggered (true). This is called the Alert test. When the Alert test is triggered (true), the Alert result is run. An Alert result can be an existing report procedure or you can create the Alert result using InfoAssist.
- ❑ **Scheduling flexibility.** Optionally, you can schedule an Alert to run as often as every minute to evaluate the Alert test conditions.

Components of an Alert

The Alert feature requires the following components:

- ❑ **WebFOCUS Reporting Server.** This server is responsible for processing the procedure, accessing and retrieving the requested data, and creating the report when the Alert test is triggered (true).
- ❑ **Managed Reporting.** This environment is used to create and manage Alerts in the WebFOCUS repository.

An Alert consists of the following:

- ❑ Alert test
- ❑ Alert result

An Alert test is required to check whether or not a set of defined test conditions (rules) is met (true or false). An Alert test can be a *WebFOCUS Test*, which is a simple TABLE request that you create to define the condition to test for. Alternatively, an Alert test can be a *Test for File Existence*, which checks for the existence of a file that is accessible to the WebFOCUS Reporting Server to which the Alert test is submitted. The file does not need to be in the APP PATH. It just needs to be in a location where it can be found by the Reporting Server.

The *Test for File Existence* file does not need to be an actual file with an extension. Testing for the existence of a folder is also valid.

If the Alert test is triggered (true), returns records, the Alert result request is processed. You have the option of creating the result report or selecting an existing report stored in the WebFOCUS repository that you are authorized to run.

Alerts Created in the Browser

When you select a new Alert from the Legacy Home Page or WebFOCUS Home Page, the WebFOCUS Alert Assist tool opens for the creation of components. Alert Assist is a Bindows™ application that is launched in a separate browser window.

The browser tab uses the generic name `Alertn`, where n is an index number starting at 1. All subsequent Alerts increase by 1. If you save the Alert, the dialog box is automatically set up with this generic name. However, you can change the name as desired.

If you select *WebFOCUS Test* in the browser, you are prompted to create the Alert test using InfoAssist. The version of InfoAssist that is invoked does not have field styling, heading, footing, or report options, such as OLAP and On-Demand Paging. The Alert test determines whether or not a specified condition is true. It is not the report that is displayed as the result of the Alert.

You can create the Alert result using InfoAssist, this time with all the available styling and report options. Alternatively, you can select an existing report stored in the WebFOCUS repository that you are authorized to run.

Note: It is recommended that you select an existing report for the Alert result request, as it is available to edit, run interactively, or schedule independently of the Alert. If you create the Alert result using InfoAssist within Alert Assist, you need to use Alert Assist and select the open option again to edit the request, because the Alert test and the report to be run are contained within the Alert procedure.

Reference: Alert Assist Sample Code Created With InfoAssist

In the sample code that follows, both the Alert test and the report to be run (Alert result) are created with InfoAssist. To keep the sample code simple, styling and report options, such as report headings and conditional styling, are not included in this request.

Notice that after the first TABLE request, there is a –IF statement that checks if the number of lines in the Alert test is equal to zero (-IF &LINES EQ 0). This test condition determines if the second TABLE request, to execute the report, should be triggered (true).

If the number of lines is greater than zero, then there are records that satisfy the Alert test, and the report is run. If the number of lines is equal to zero, then there are no records that satisfy the Alert test, and the report is not run.

```
-* Created by Alert Assist
-* start of the test report
ENGINE INT CACHE SET ON
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE ibisamp/wf_retail
SUM WF_RETAIL.WF_RETAIL_SALES.COGS_US
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US
BY WF_RETAIL.WF_RETAIL_PRODUCT.PRODUCT_CATEGORY
BY WF_RETAIL.WF_RETAIL_PRODUCT.BRAND
WHERE WF_RETAIL.WF_RETAIL_SALES.COGS_US GT
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US;
ON TABLE HOLD
ON TABLE NOTOTAL
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET CACHELINES 100
END
-* end of the test report
```



```

-* start of the test
-RUN
-IF &LINES EQ 0 GOTO ALERTEXIT;
-* end of the test
-* start of the output report
ENGINE INT CACHE SET ON
-*COMPONENT=Define_wf_retail
DEFINE FILE ibisamp/wf_retail
Loss/D12.2=WF_RETAIL.WF_RETAIL_SALES.REVENUE_US -
WF_RETAIL.WF_RETAIL_SALES.COGS_US ;
END
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE ibisamp/wf_retail
SUM WF_RETAIL.WF_RETAIL_SALES.QUANTITY_SOLD
Loss
BY WF_RETAIL.WF_RETAIL_PRODUCT.BRAND
ACROSS WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_QTR
WHERE WF_RETAIL.WF_RETAIL_SALES.COGS_US GT
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US;
ON TABLE SUBHEAD
"Brand Revenue Loss"
ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET CACHELINES 100
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET GRWIDTH 1
ON TABLE SET STYLE *
INCLUDE=IBFS:/FILE/IBI_HTML_DIR/javaassist/intl/EN/ENIADefault_combine.sty,$
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING,
SUMMARY=&WF_SUMMARY.QUOTEDSTRING, HFREEZE=OFF, $
TYPE=TABHEADING, LINE=1, JUSTIFY=CENTER, $
TYPE=TABHEADING, LINE=1, ITEM=1, OBJECT=TEXT, SIZE=14, STYLE=BOLD+ITALIC, $
ENDSTYLE
END
-* end of the output report


-* start of the options
-* end of the options
-ALERTEXIT
-* Finished by Alert Assist

```

***Procedure:* How to Launch WebFOCUS Alert Assist**

1. Sign in to WebFOCUS as an administrator or developer.

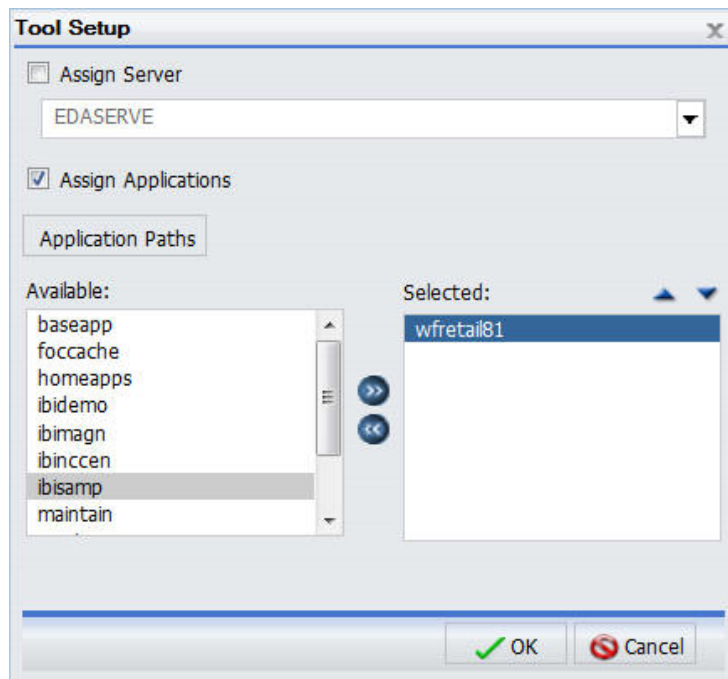
2. Launch WebFOCUS Alert Assist in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Alert* . Proceed to step 5.
- ☐ From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want the alert to reside, point to *New*, and then click *Alert*.

The Tool Setup dialog box opens. It provides options for selecting a Reporting Server and Application Paths.

Note: User access to the Tool Setup dialog box to specify Reporting Server properties is controlled by a WebFOCUS security privilege. For information on WebFOCUS security privileges, see the *WebFOCUS Security and Administration* manual.

3. Select a Reporting Server and Application Paths when not using the default Reporting Server specified in the WebFOCUS Client configuration or the default application path for that Reporting Server, as shown in the following image.

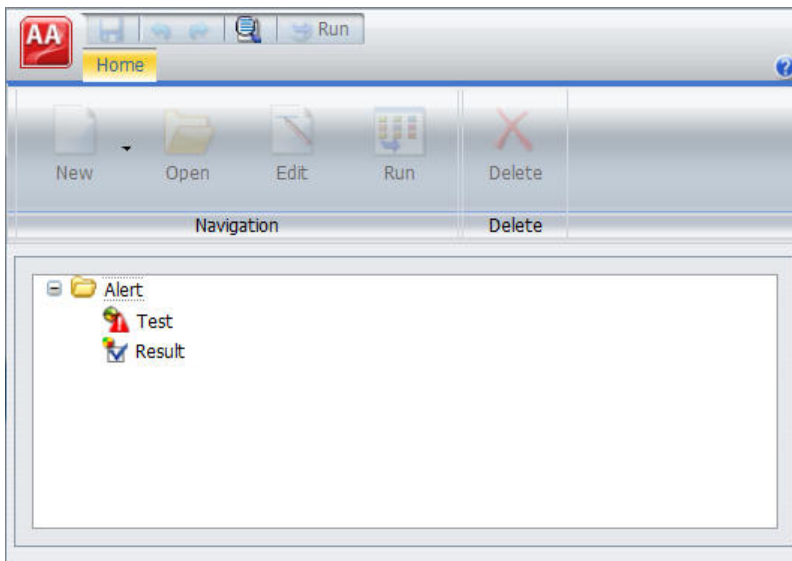


Note: The Tool Setup dialog box is only available on the Legacy Home Page. On the WebFOCUS Home Page, you must set a Reporting Server and Application Paths on the folder level in the Properties prior to creating content.

4. Click OK.
5. WebFOCUS Alert Assist opens.

Alert Assist Overview

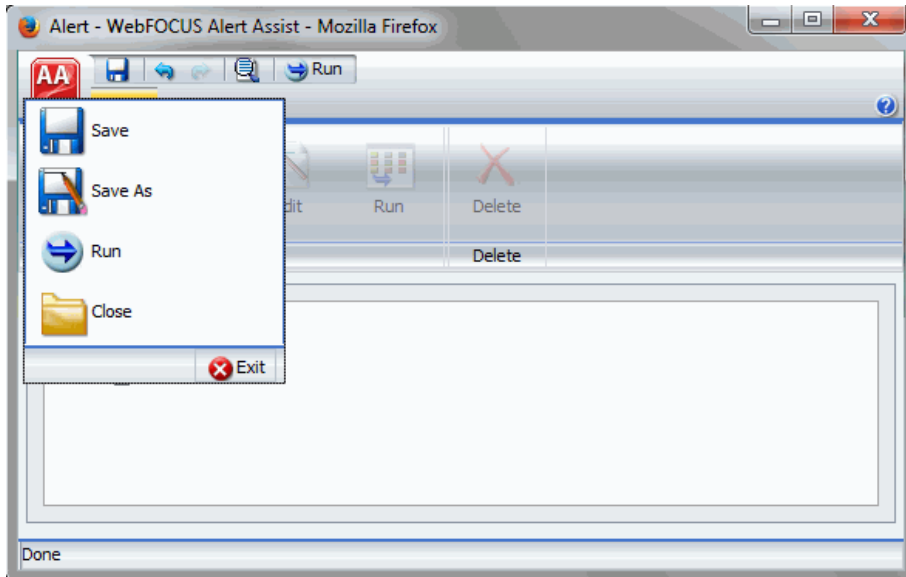
When you create an Alert in the web browser, it invokes Alert Assist and then InfoAssist. Alert Assist has a user interface similar to InfoAssist. The following image shows the WebFOCUS Alert Assist interface.



Alert Assist Main Menu

In the upper-left corner of the browser window is the Application button, which provides access to the Alert Assist Main Menu. This menu contains the Save, Save As, Run, Close, and Exit options. Some of these options are also on the Alert Assist Quick Access toolbar.

The following image shows the expanded Alert Assist Main Menu.



Save

Saves the Alert. This option is disabled until both parts of the Alert are created.

Save As

Saves the current Alert with a new name. The Save As dialog box displays a field where you can type the new name. This option is disabled until both parts of the Alert are created.

Run

Submits the Alert procedure to the Reporting Server. This option is active when both parts of the Alert have been created. The output always opens in a new browser.

Close






Closes the current Alert and prompts you to save any changes.

Exit

Exits the Alert Assist and prompts you to save any pending changes to the open Alert.

Alert Assist Quick Launch Toolbar

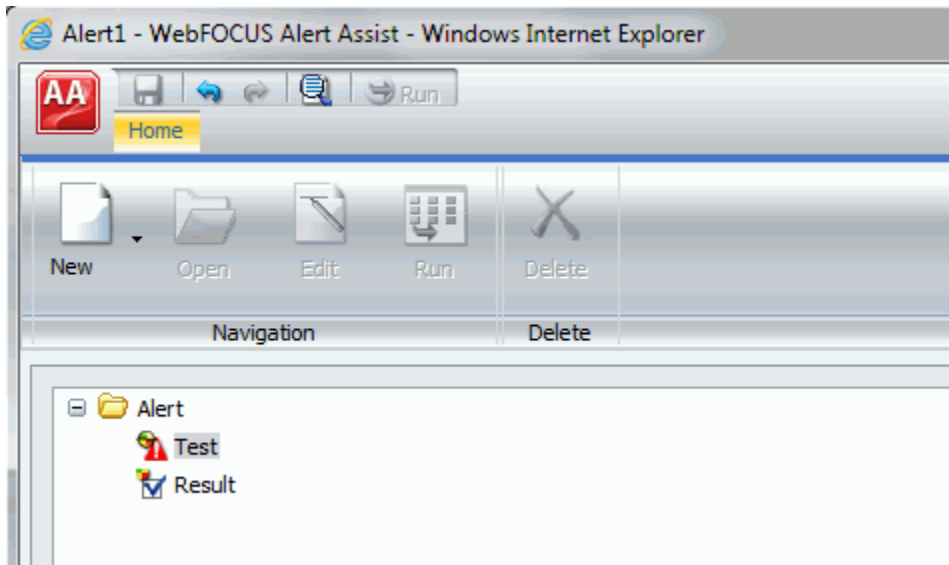
The Alert Assist Quick Launch toolbar contains the following buttons.

Button	Description
	Saves the Alert. This option is disabled until both parts of the Alert are created.
	Reverts back by undoing one action.
	Moves forward by redoing one action.
	Displays the Alert procedure code in a read-only window.
	Submits the entire Alert procedure to the Reporting Server. This option is active when both parts of the Alert have been created. The output always opens in a new browser.

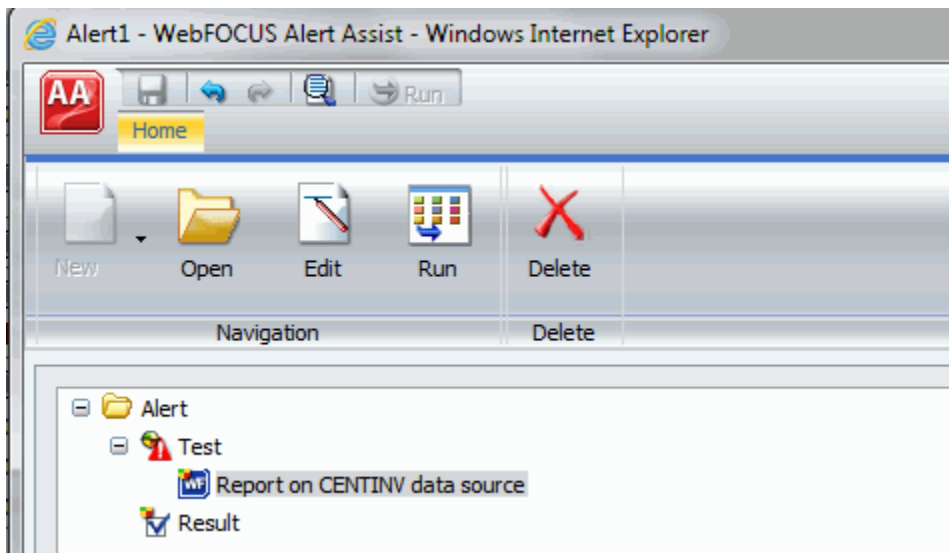
Ribbon

Under the Alert Assist Quick Access toolbar is a ribbon. When Alert Assist first opens, none of the ribbon options are activated.

You must select the Test node or Result node to activate the New option, as shown in the following image.



You must create a Test to activate the remaining options, as shown in the following image.



The ribbon contains the following options:

Navigation Group**New**

Displays a menu from which you can choose to create a new WebFOCUS report or WebFOCUS test, open an existing report, or test for file existence. This button is active when the Test node or Result node is selected. You can also find these options in the shortcut menus for the Test node and Result node.

Open

Invokes InfoAssist so that you can make changes to the report when an Alert test or Alert result is selected. The Open option is only activated after a report test is created.

Edit

Opens the report on FILENAME data source dialog box when an Alert test or Alert result is selected. You can then edit the report in a text editor.

Run

Runs the report in a new browser window when an Alert test or Alert result is selected.

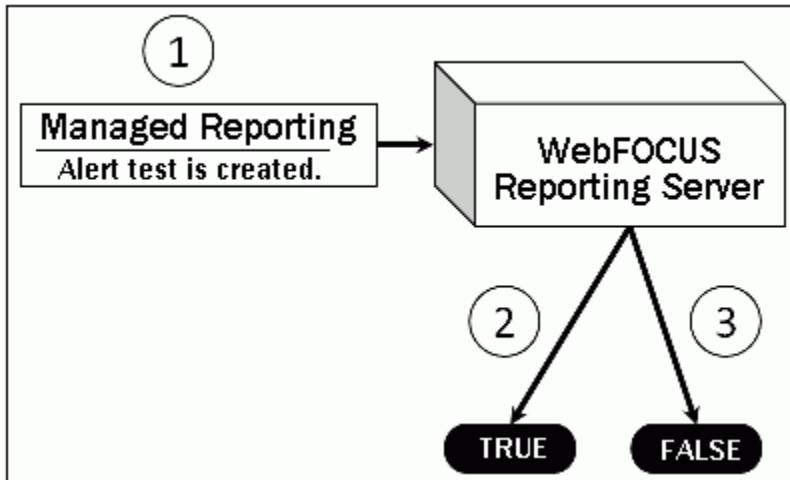
Delete Group**Delete**

Removes the report from the Test or Result node.

The Life of an Alert

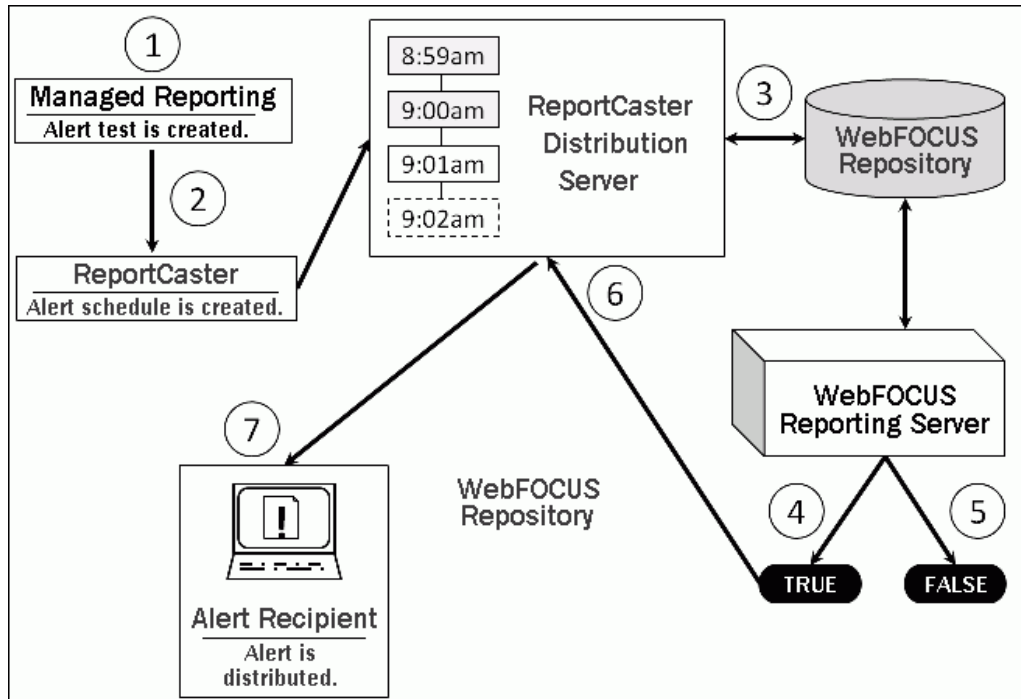
Authorized users can run an Alert test interactively and optionally schedule it to be distributed by ReportCaster.

The following image shows basic Alert processing.



1. The developer, using Alert Assist or the Alert Wizard, creates an Alert test and designs the report that is run if the Alert condition is true.
2. If the Alert test is true, the WebFOCUS Reporting Server runs the Alert result.
3. If the Alert test is false, the Alert result is not run.

The following image shows scheduled Alert processing.



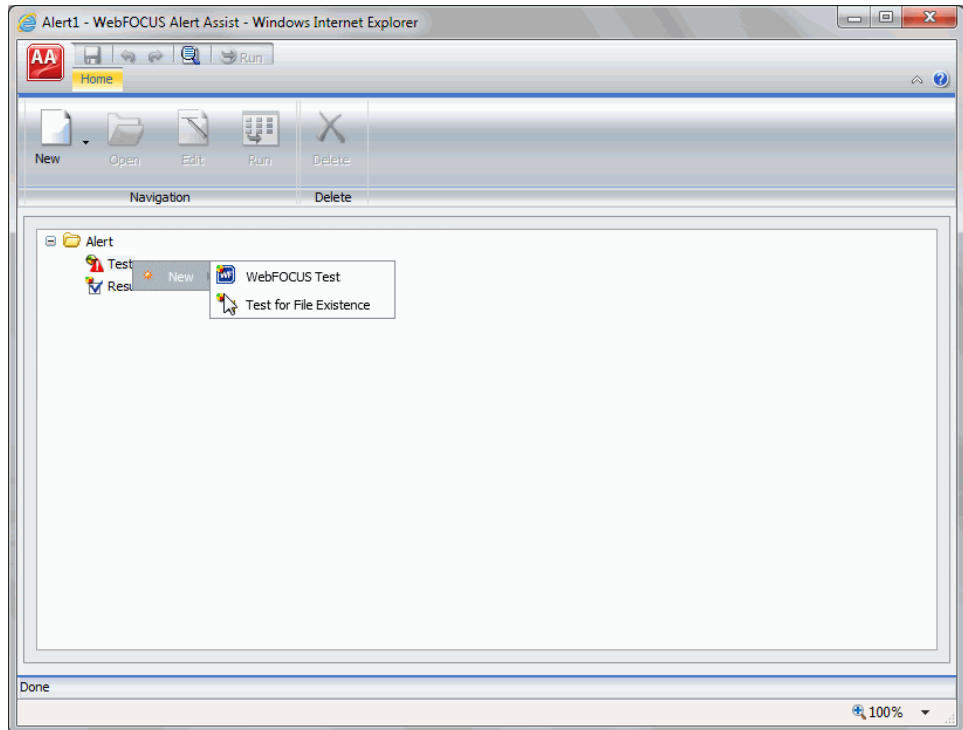
1. The developer, using Alert Assist or the Alert Wizard, creates an Alert test and designs the report that is run if the Alert condition is true.
2. If desired, an Alert schedule is created using ReportCaster.
3. The ReportCaster Distribution Server checks for scheduled jobs in the WebFOCUS Repository.
4. When the ReportCaster Distribution Server processes a scheduled Alert procedure, it is submitted to the Reporting Server to evaluate if the Alert test is true.
 - a. If the Alert test is false, the Alert is returned to the queue for the next scheduled time.
 - b. If the Alert test is true, the Reporting Server runs the Alert result and returns the results to the ReportCaster Distribution Server. The ReportCaster Distribution Server distributes the Alert result to the recipients, as specified in the schedule.

Creating and Scheduling an Alert

The following procedures describe how to create an Alert test, and Alert result using Alert Assist, and how to schedule an Alert with ReportCaster.

Procedure: How to Create an Alert Test

1. In the Alert Assist main window, right-click the *Test* node, and then point to *New*, as shown in the following image.



2. Select one of the following options:

☐ **WebFOCUS Test.** Allows you to create a new report in a scaled-down version of InfoAssist. Proceed to step 3.

☐ **Test for File Existence.** Allows you to select an existing report. Proceed to step 6.

Note: The scaled-down version of InfoAssist is used to create basic TABLE requests with HOLD (not PCHOLD FORMAT) statements. It generates procedure syntax that is written to the Alert the same way as in earlier WebFOCUS releases. The Edit option on the ribbon allows you to open the editor and manually enter the procedure code or edit existing procedure code. When the test is saved from the editor, the syntax needs to be validated as having an ON TABLE HOLD statement, a prerequisite for an Alert test.

3. When you select *WebFOCUS Test*, InfoAssist opens. Select a Master File from the Open dialog box.

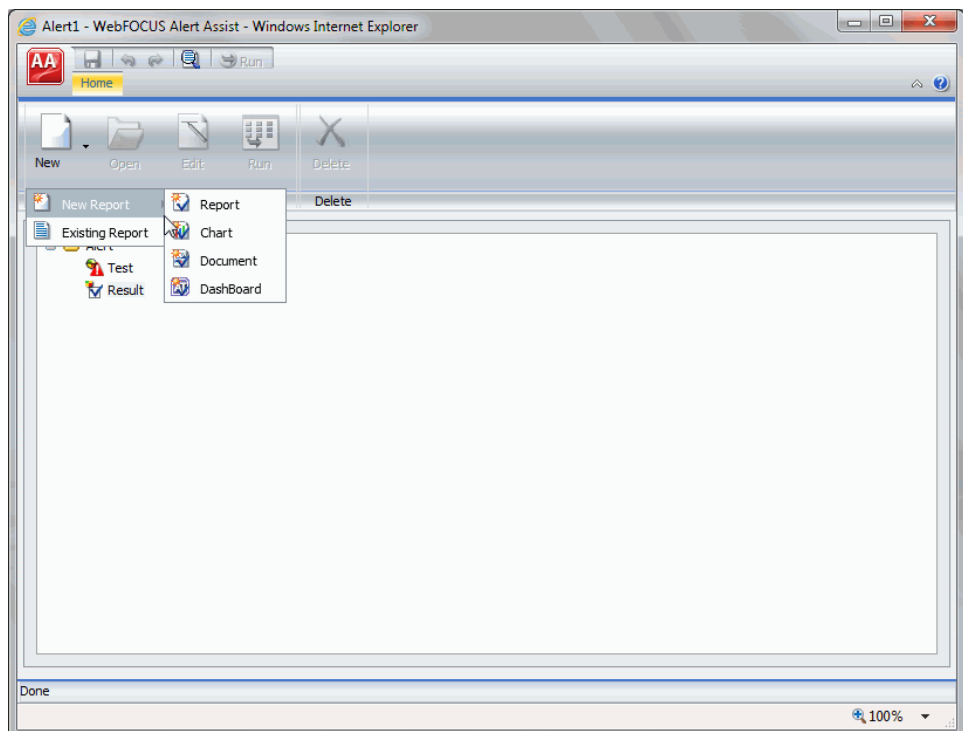
4. Create your report as desired, and then save it.
5. Close InfoAssist to return to Alert Assist.
6. When you select *Test for File Existence*, type the full path to the file accessible to the Reporting Server that you want to check exists. Do not use a file name or folder path that includes spaces.

Testing a folder for existence is also valid. Type the full path to the folder accessible to the Reporting Server. If the file is located, the Alert is triggered (true) and the Alert result report is run.

7. Click *OK* to save the Alert test.

Procedure: How to Create an Alert Result

1. In the Alert Assist main window, right-click the *Result* node, and then point to *New*, as shown in the following image.



2. Select one of the following options:
 - ☐ **New Report.** Allows you to create a new report, chart, document, or dashboard, using the full version of InfoAssist. Proceed to step 3.


- ☐ **Existing Report.** Allows you to choose from the existing reports in the tree. Proceed to step 5.
 - 3. If you select *New Report*, the Open dialog box opens. Select a Master File.
InfoAssist opens, and you can create the report that will be run when the Alert test is triggered (true).
 - 4. Save your report, and close the InfoAssist window to return to Alert Assist. Proceed to step 9.
 - 5. If you select *Existing Report*, the Open dialog box opens. Select a report you are authorized to run from the tree.
 - 6. Click *Open*.
- The Open dialog box closes and the selected report appears under the Result node.
- 7. Select *Save* from the Alert Assist menu. The Save As dialog box opens.
 - 8. Type the Alert Title, and click *OK*.
 - 9. Close Alert Assist to return to the Legacy Home Page or WebFOCUS Home Page.

The Alert result is automatically run if the Alert test report is triggered (true). If you are authorized to schedule reports for distribution, you can optionally schedule the Alert.

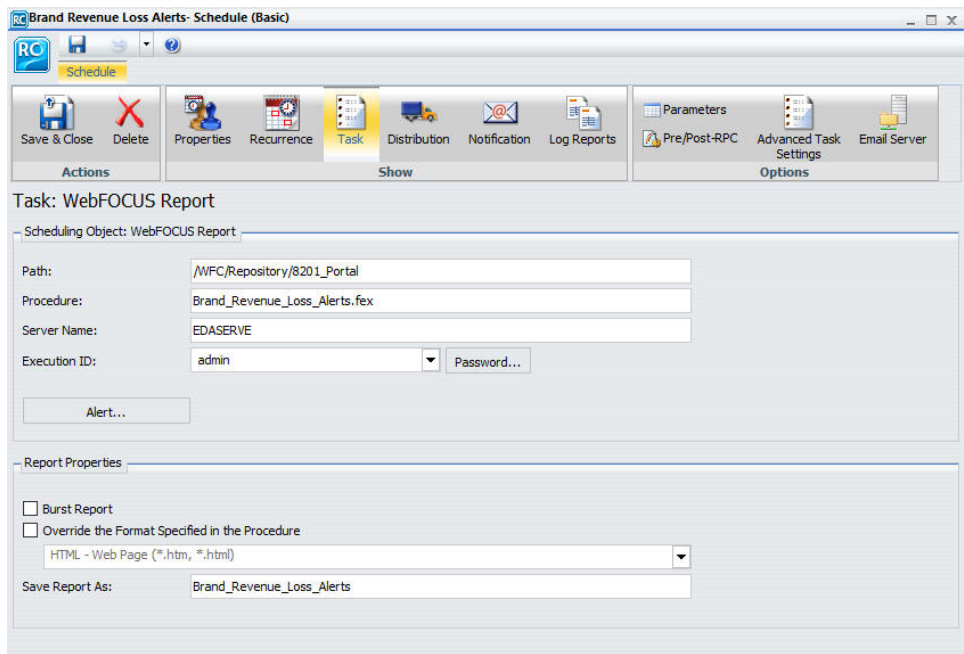
Note: As you use Alert Assist to create reports, you may see messages that state Report Saved. Your changes to the report have been saved, but they are not written to the WebFOCUS Repository until the Alert is saved. If you exit Alert Assist before you click *Save* in the Alert Assist menu, the Alert is not saved.

Procedure: How to Schedule an Alert

1. Access the scheduling tool in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Schedule* .
- ☐ From the Legacy Home Page, in the Resources tree, click the domain or folder where the Alert resides. In the WebFOCUS Explorer, click the Alert and then click *Schedule*. Select how the Alert report will be distributed when the Alert test is triggered (true).

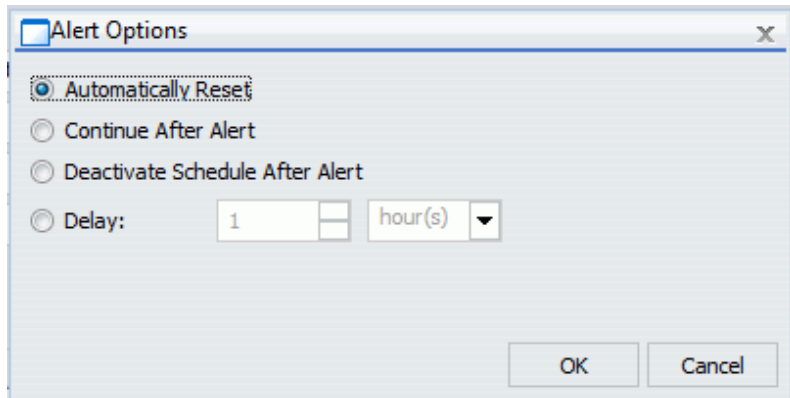
The ReportCaster Basic Scheduling tool opens in a new browser window, as shown in the following image.



For more information on the Basic Scheduling tool and distribution options, see the *ReportCaster Guide*.

2. Click *Alert*.

The Alert Options dialog box opens, as shown in the following image.



3. Select one of the following Alert Options:

- ☐ **Automatically Reset.** This option continues to run the schedule at the specified time and checks to confirm that the Alert test is no longer true before the Alert test is evaluated again. It is best to use this option when you do not want to receive the Alert result again until after the exception condition has been addressed and occurs again. For example, when the quantity in inventory is greater than 20,000, the Alert is triggered. You do not want to receive the report again until after the inventory is less than or equal to 20,000 for all products and then goes back over 20,000 again.
- ☐ **Continue After Alert.** This option continues to run the schedule at the specified time and distribute the report each time that the Alert test is true. It is best to use this option when you want to be notified at the interval specified in the schedule that the Alert test is true.
- ☐ **Deactivate Schedule After Alert.** This option deactivates the schedule after the Alert is triggered. The schedule has to be activated again for the Alert test to run after the Alert is triggered. It is best to use this option for one-time Alert tests. This is the default value.
- ☐ **Delay.** This option is best used when you want to allow a specific period of time to address the Alert test but want to be notified again if the Alert test has not been met. You can restart the Alert after a maximum of 99 hours, days, weeks, months, or years.

As you complete the creation of the schedule, remember to consider the burst option to distribute specific report values, instead of the entire report. When a report is burst, the distribution information must be provided in a distribution list, distribution file, or dynamic list for email distribution and an access list for library distribution. The email and library distribution options are the most effective for Alert reports because of the push versus pull notification through email. For more information on using the burst option in ReportCaster, see the *ReportCaster Guide*.

- 4. Select the *Properties* tab and type a title and summary for the scheduled report.
- 5. Click *Recurrence* and specify when and how often to run the schedule.

For more information on Recurrence options, see the *ReportCaster Guide*.

- 6. Click *Distribution* and specify the destination information for where you want the report to be distributed. For more information on specifying schedule distribution information, see the *ReportCaster Guide*.
- 7. If you wish to receive notifications of the Alert distribution, click *Notification* and specify the destination information for where you want the notification to be sent.

8. If your Alert uses parameters, check *Parameters* to review and specify parameter values. Ensure that you have the correct Path, Procedure, and Server Name. For more information on specifying parameter values when scheduling a report procedure (FEX), see the *ReportCaster Guide*.

9. Click **Save** and close the ReportCaster Basic Scheduling tool.

The schedule report now appears in the repository, and you can access it from either home page.

Checking Scheduled Alerts

When an Alert test is false (and therefore not activated), the Alert result report is not run.

When an Alert schedule runs, information about the Alert test evaluation (true or false) and any error or warning messages that occur during schedule or Alert processing are written to the log file.

In order to track the completion of a scheduled Alert, or errors that occurred during processing without checking the log report for the Alert schedule, we recommend that you use the Schedule Notification option.

In the Scheduling tool, the Notification tab allows you to specify:

- ☐ The terms for supplying notification (Never, which is the default value, Always, or On Error).
- ☐ The level of detail in the notification (full notification or brief notification).
- ☐ The email addresses to distribute the notification information to.

Using Sample Data to Create and Schedule an Alert


A data-driven Alert is an event that is prompted by a guideline that you define. This guideline can vary from the simple to the complex. The following tutorial describes how to create a simple Alert that is triggered when the cost of goods exceeds the revenue for a brand. This type of Alert could help a company decide whether they should continue to carry a specific brand, based on the money loss throughout a given timeframe.

To follow this tutorial, you must have access to the WebFOCUS Retail sample data source.

Example: Creating and Scheduling an Alert

1. Sign in to WebFOCUS as an administrator or developer.

2. Launch WebFOCUS Alert Assist in one of the following ways:

- ☐ From the WebFOCUS Home Page, on the actions bar, click *Alert* . Proceed to step 5.
- ☐ From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want the alert to reside, point to *New*, and then click *Alert*.

The Tool Setup dialog box opens. It provides options for selecting a Reporting Server and Application Paths.

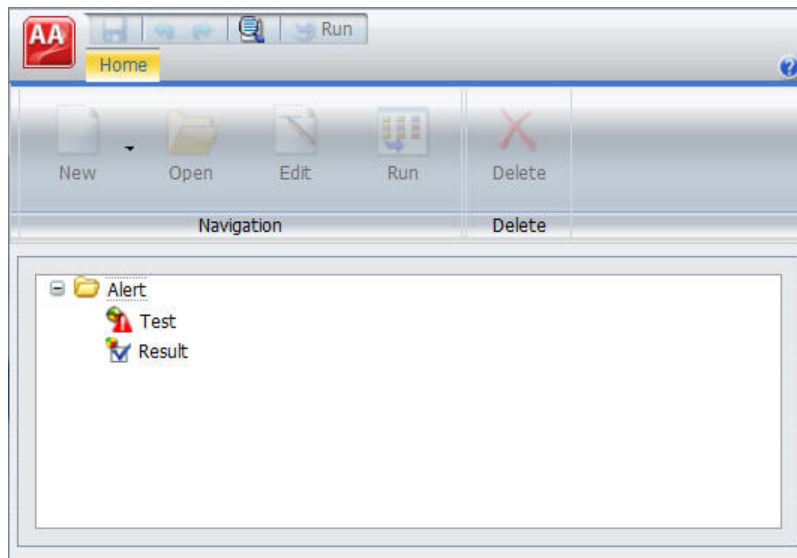
Note: User access to the Tool Setup dialog box to specify Reporting Server properties is controlled by a WebFOCUS security privilege. For information on WebFOCUS security privileges, see the *WebFOCUS Security and Administration* manual.

3. In the Tool Setup dialog box, select the server where the sample data is loaded, and assign the Application where your data resides.

Note: The Tool Setup dialog box is only available on the Legacy Home Page. On the WebFOCUS Home Page, you must set a Reporting Server and Application Paths on the folder level in the Properties prior to creating content.

4. Click *OK*.

The Alert Assist tool opens in a new browser window, as shown in the following image.



5. Click the *Test* node.

6. On the *Home* tab, in the *Navigation* group, click *New*, and then click *WebFOCUS Test*.

WebFOCUS InfoAssist opens.

7. From the Open dialog box, choose the *wf_retail* Master file.

8. Add the following fields to your report:

- ☐ Product Category
- ☐ Brand
- ☐ Cost of Goods
- ☐ Revenue

Before you complete your report, you must add the *Where* condition that defines the criteria that you want to be met.

9. On the *Data* tab, in the *Filter* group, click *Filter*.

The Create a filtering condition dialog box opens.

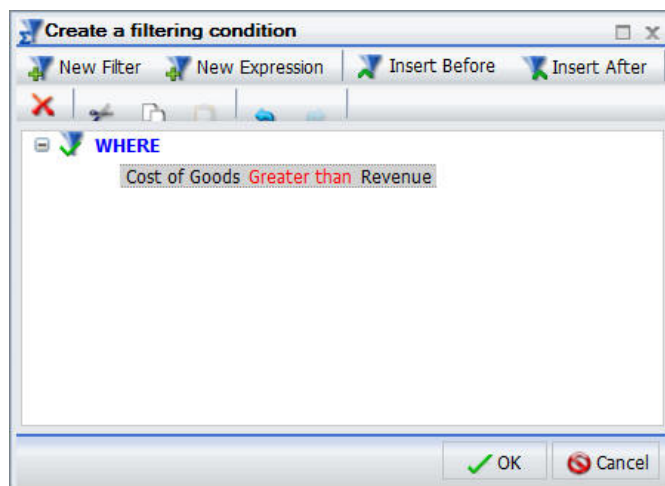
10. Double-click the *Double-click or press F2 to edit!* text.

The drop-down menus for Fields and Subqueries, Operators, and Values open.

11. Make the following selections:

- ☐ In the Field drop-down menu, click *Cost of Goods*.
- ☐ In the Operators drop-down menu, click *Greater than*.
- ☐ In the Value drop-down menu, click *Field*, and then select *Revenue*.

The following image shows the finished *Where* condition.



12. Click *OK*.

13. Save your report and close InfoAssist.

Your report now shows under the *Test* node in the Alert Assist browser window.

14. Click the *Result* node. On the *Home* tab, in the *Navigation* group, point to *New*, click *New Report*, and then click *Report*.

WebFOCUS InfoAssist opens.

Since your Alert Test is checking for revenue loss, in this tutorial you want the final report to have a field that highlights the loss. This field is not available by default. You can create it.

15. From the Open dialog box, choose the *wf_retail* Master file.

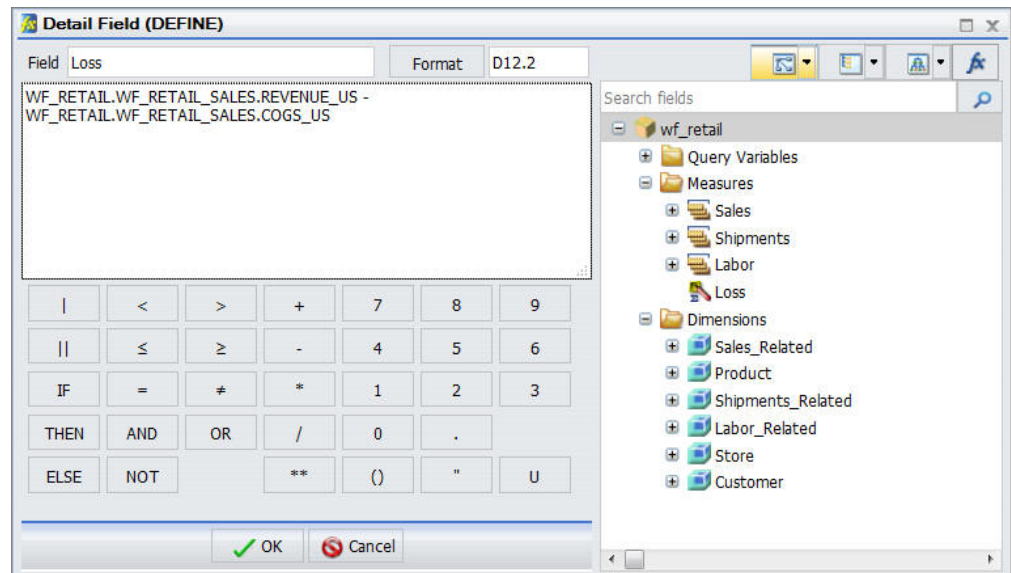
16. On the *Data* tab, in the *Calculation* group, click *Detail*.

The Detail Field (Define) dialog box opens.

17. In the Field input box, type *Loss*.

18. In the expressions field, create the following expression, as shown in the image below:

WF_RETAIL.WF_RETAIL_SALES.REVENUE_US -
WF_RETAIL.WF_RETAIL_SALES.COGS_US



You can type the expression directly into the expression field or choose the fields from the data tree.

19. Click *OK*.

The Data pane refreshes and now displays the new field, *Loss*.

20. Add the following fields to your report:

- ☐ *Brand*
- ☐ *Quantity, Sold*
- ☐ *Loss*
- ☐ *Sale, Quarter*

To ensure that the Alert Result generates the correct report when the test criteria is met, you must add the same *Where* condition as the one you added to the Alert Test.

21. Repeat steps 8-11 to add the *Where* condition.

You can style the report that gets distributed by adding a header.

22. On the *Home* tab, in the *Report* group, click *Header & Footer*, and then click *Report Header*.

The *Header & Footer* dialog box opens.

23. Type *Brand Revenue Loss 2015*.

24. Click *OK*, and close the *Header & Footer* window.

25. Save your report, and close *InfoAssist*.

Once both *Test* and *Result* are completed, you can save the Alert procedure.

26. In the Alert Assist browser window, click the *Save* button.

The *Save As* dialog box opens.

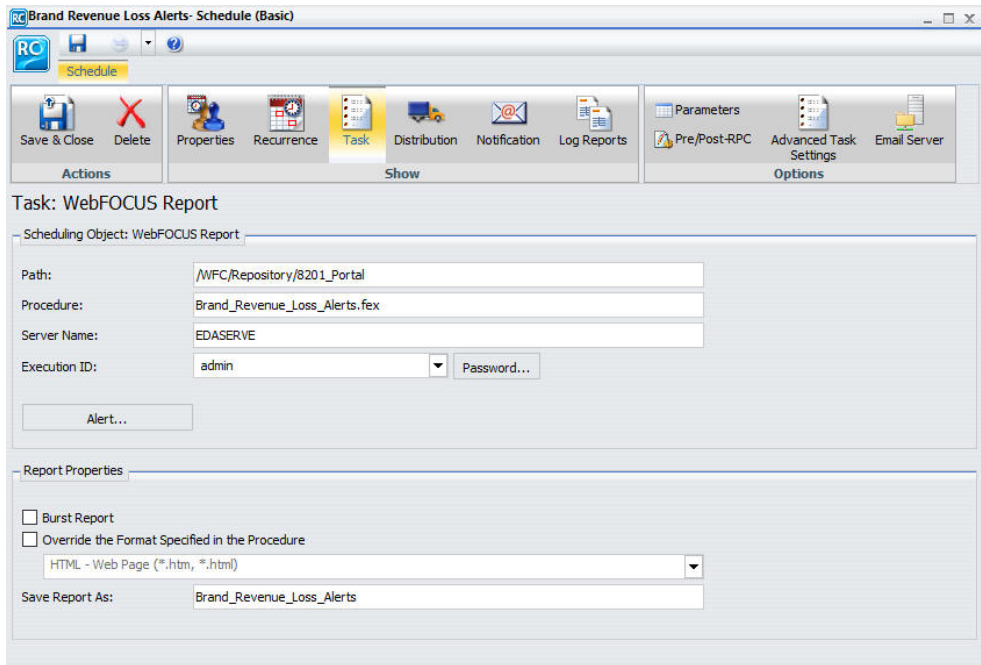
27. In the *Title* field, type *Brand Revenue Loss Alerts*, and then click *Save*.

Your new Alert now displays in the *Resources* tree and can be scheduled.

You can schedule the report to be distributed through email, FTP server, report library, repository, or sent directly to a printer. In this tutorial, you want a monthly email to be sent.

28. From the *WebFOCUS Home Page* or *Legacy Home Page*, right-click the Alert that you created, point to *Schedule*, and then click *Email*.

The ReportCaster Basic Scheduling tool opens, as shown in the following image.



29. Under the Scheduling Object area, click *Alert*.

The Alert Options dialog box opens.

30. Click *Continue After Alert* and then click *OK*.

This means that the schedule continues to run at the specified time and distribute the report each time that the Alert test is true. Other options include Automatically Reset, Deactivate Schedule After Alert, and Delay. For more information about these options, see the *ReportCaster Guide*.

31. Click *Properties*.

32. In the Summary area, type *This Alert procedure monitors the revenue loss by brand*.

33. Click *Reoccurrence*. In this example, you want to schedule the Alert procedure to run monthly on the last day of every month, as shown in the following image.

Brand Revenue Loss Alerts- Schedule (Basic)

Actions: Save & Close, Delete

Show: Properties, **Recurrence**, Task, Distribution, Notification, Log Reports

Options: Parameters, Pre/Post-RPC, Advanced Task Settings, Email Server

Settings

☐ Run Once

☐ Minutes

☐ Hourly

☐ Daily

☐ Weekly

☒ Monthly

☐ Yearly

☐ Custom

The time zone for the Start Time, End Time and Until Time is Eastern Standard Time (GMT-0400) .

Start: Tuesday, October 4, 2016 8: 27 AM

End: Thursday, December 31, 2099 11: 59 PM

Every 1 month(s) on:

☐ The first Monday of the month(s)

☒ Day(s)

1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	Last Day of Month			

Advanced settings

☐ Repeat schedule every: 10 Minute(s)

☐ Until Time: 8: 27 AM

☒ Last For: 1 hour(s) 0 minute(s)

34. Click *Distribution*.

35. Complete the To, From, and Reply Address fields with the email addresses. In this tutorial, you can use your own email address to test the Alert. In the Subject field, type *Brand Revenue Loss Alerts*.

The following image shows an example of the Distribution tab.

Brand Revenue Loss Alerts- Schedule (Basic)

Schedule

Save & Close Delete Properties Recurrence Task Distribution Notification Log Reports Parameters Pre/Post-RPC Advanced Task Settings Email Server

Actions Show Options

Distribution: Email

Distribution Information

Type: Email Address(s)

To: RetailSales@wfelectronics.com

From: Purchasing_Manager@wfelectronics.com

Reply Address: Purchasing_Manager@wfelectronics.com

Subject: Brand Revenue Loss Alerts

Email Information

☐ Send the report as inline message

☒ Send all reports as attachments

☒ Message: Please see attachment(s).

☐ File: Browse...

Packet Email: Default (Yes)

Report Compression

☐ Add Report to Zip File

Zip File Name:

Zip Minimum Size: 0 KB (☐ Override Default)

Additionally, you can set notifications of the Alert distribution. Click *Notification* and fill in the fields, as required.

36. Click **Save**.

The Save As dialog box opens.

37. In the Title field, type *Brand Revenue Loss Alert Schedule* and click **OK**.

The Alert Schedule now displays in the Resources tree.

38. Close the ReportCaster Basic Scheduling Tool.

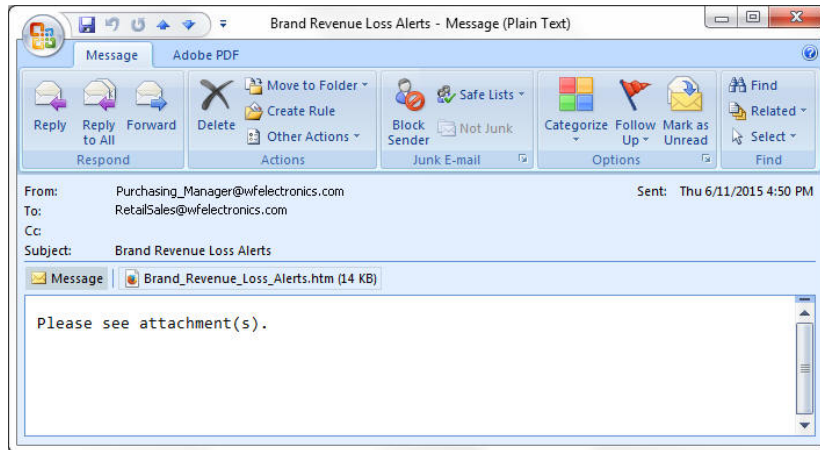
39. To test the Alert, before it is scheduled to run, right-click the Alert Schedule, and then click *Run*.

A prompt will ask you if you want to run the schedule.

40. Click **OK**.

The email addresses that you identified earlier will receive the Alert Report, shortly.

The following images show examples of the Alert email and Alert report.



Brand Revenue Loss								
Brand	Sale,Quarter							
	1		2		3		4	
	Quantity Sold	Loss	Quantity Sold	Loss	Quantity Sold	Loss	Quantity Sold	Loss
Audio Technica	84	-2,520.66	123	-4,380.90	112	-3,640.78	119	-3,710.87
BOSE	226	-9,448.30	211	-9,091.10	219	-7,564.80	256	-10,807.70
Canon	315	-19,929.27	232	-14,270.26	284	-17,367.22	364	-25,964.99
Denon	104	-1,750.79	110	-2,030.83	84	-2,450.66	154	-3,991.13
Grado	80	-3,826.00	78	-3,987.50	95	-3,900.50	91	-5,196.50
Philips	307	-2,070.12	226	-1,512.52	240	-1,620.14	327	-2,210.27
Pioneer	2,185	-62,262.10	1,946	-55,405.14	2,117	-55,372.67	2,408	-64,258.17
Polk Audio	457	-11,396.66	453	-8,860.95	444	-11,371.36	564	-11,168.44
Roku	391	-2,032.79	403	-1,973.97	392	-2,358.87	414	-2,169.05
Samsung	2,072	-52,279.98	2,061	-59,191.05	2,117	-55,684.40	2,440	-66,605.98
Sennheiser	450	-12,641.67	418	-13,440.34	369	-10,743.59	500	-14,168.56
Sharp	1,190	-37,162.05	1,132	-37,419.97	1,166	-36,436.46	1,471	-48,162.78

Creating Reporting Objects

With WebFOCUS Managed Reporting, a developer can easily transform complex views of data into simple objects labeled with common business terminology that every user can understand, such as Weekly Sales or Revenue. Developers create Reporting Objects that present available data using terms and formats meaningful to users. Users can then use Reporting Objects as templates for the creation of a wide range of reports and charts.

This topic describes Reporting Objects and how you can use them in WebFOCUS.

In this chapter:

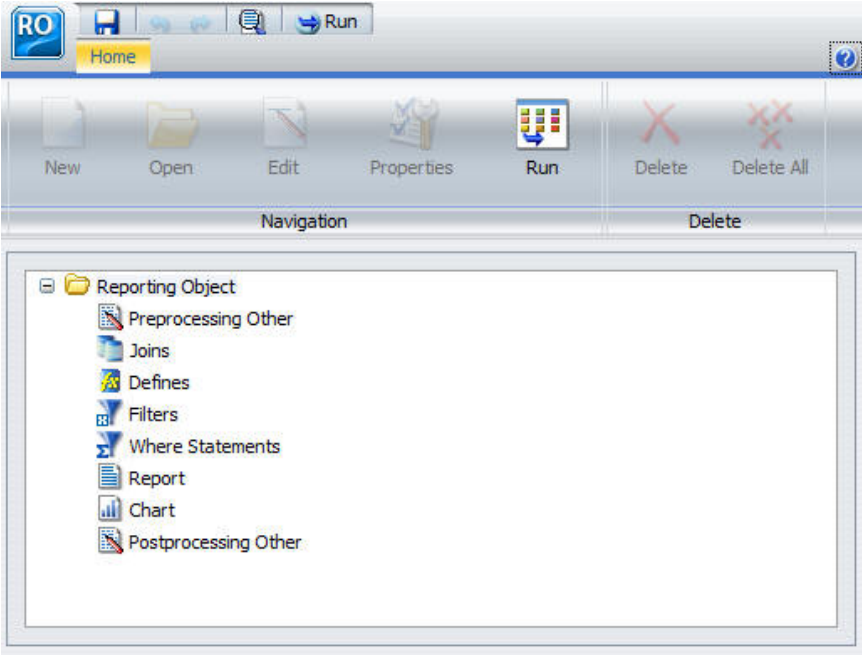
-  [Reporting Object Tool](#)
-

Reporting Object Tool

Reporting Objects are stored in folders in the tree within domain folders under the Content folder. They can include selection criteria (WHEREs), JOINS, virtual fields (DEFINES), filters, and other WebFOCUS statements, as well as reports or charts supplied as templates.


Note: A Reporting Object will not show in the repository when the user cannot functionally use the Reporting Object.





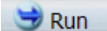
The browser Reporting Object tool allows you to create, edit, test, run, or delete a Reporting Object or its components. The main interface, as shown in the following image, consists of a static Quick Launch toolbar, a ribbon of context-sensitive options, and a window that displays the components of the Reporting Object with which you are working.



Reference: Reporting Object Tool Quick Launch Toolbar

The Reporting Object tool Quick Launch toolbar is a static menu whose commands apply to the entire Reporting Object, not simply to the particular component that you have selected. The following table describes each command in the Reporting Object tool Quick Launch toolbar.







Button	Shortcut Keys	Command	Description
	None	Reporting Object tool main menu	Launches a menu allowing you to Save, Save As, Run, and Exit.


Button	Shortcut Keys	Command	Description
	Ctrl+S	Save	Saves the Reporting Object.
	Ctrl+Z	Undo	Undoes the last action.
	Ctrl+Y	Redo	Repeats the last action.
	None	View code	Displays Reporting Object code in a read-only window.
	Ctrl+R	Run	Runs the Reporting Object.

Reference: Reporting Object Tool Ribbon


The Reporting Object tool ribbon is a menu whose commands apply to what you have selected, whether that is the Reporting Object as a whole, a particular component, or an individual example of a component. For example, a particular filter or filter group, if you have selected one, rather than selecting the entire Filter component.

The following table describes each command on the Reporting Object tool ribbon.

Button	Command	Description
 New	New	Creates a new join, DEFINE statement, filter, or WHERE statement.
 Open	Open	Launches InfoAssist to create or edit a report or chart, or launches the appropriate tool to create or edit a join, DEFINE statement, filter, or WHERE statement.
 Edit	Edit	Opens component source code in the text editor.
 Properties	Properties	Renames the selected filter or filter group.
 Run	Run	Runs the selected component.
 Delete	Delete	Deletes the selected item.

Button	Command	Description
	Delete All	Deletes all items of the type selected, for example, all WHERE statements, all filters in a particular group, or all filters in every group if the Filter component itself is selected.

Procedure: How to Create a Reporting Object

1. Sign in to WebFOCUS.
2. Access the Reporting Object tool in one of the following ways:
 - ☐ From the WebFOCUS Home Page, on the actions bar, click *Reporting Object* . The Open dialog box opens. Proceed to step 5.
 - ☐ From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want to create the Reporting Object, point to *New*, and then click *Reporting Object*.
3. In the Tool Setup dialog box, select the server where the sample data is loaded, and assign the Application where your data resides, or accept the default settings.

Note: The Tool Setup dialog box is only available on the Legacy Home Page. On the WebFOCUS Home Page, you must set a Reporting Server and Application Paths on the folder level in the Properties prior to creating content.
4. Click *OK*.

The Open dialog box opens, prompting you to select a Master File.
5. Select a Master File and click *OK*.


The Reporting Object tool appears.

Procedure: How to Edit a Reporting Object

Right-click the Reporting Object and select *Edit*.

Note: Double-clicking the Reporting Object runs the Reporting Object rather than allowing you to edit it.

Procedure: How to Save a Reporting Object

1. Press Ctrl+S or click the Save  icon on the Quick Launch toolbar.
The Save dialog box opens.
2. Type the name of the new Reporting Object in the Title field and click *OK*.
From now on, clicking Save or pressing Ctrl+S saves the Reporting Object without launching the Save dialog box.

Running a Reporting Object From the Browser

You can run a Reporting Object or any individual component of it from the browser. You can run a Reporting Object in the following ways:

- ☐ Select the object in the Reporting Object tool and click *Run*, or right-click the object and select *Run*.
- ☐ Right-click the Reporting Object in the tree and select *Run* or *Run Deferred*.

The Run option in the Reporting Object tool is enabled regardless of the setting of the *Only Run as a Deferred Report* property.

Expected Behavior of Running a Reporting Object

When you select and run a Reporting Object, the expected behavior is as follows:

- ☐ When you define a Report or Chart component, all components of the Reporting Object run.
- ☐ When you define a Report and Chart component, an HTML page opens, which enables you to select which component to run.
- ☐ When you define filters in a Reporting Object, an HTML page opens, which enables you to select from the defined filters of the Reporting Object.
- ☐ When you define parameters in a report or chart and the Reporting Object Prompt for Parameters property is specified, an HTML page opens, which prompts you for parameter values.
- ☐ Reporting Object components are validated prior to run time. This means that errors are found and corrected more easily, since errors in individual components are detected prior to run time.
- ☐ If you attempt to run a Reporting Object that is created without using the Report or Chart component, you receive the message:

Your request did not return any output to display.

Possible causes:

- No data rows matched the specified selection criteria.
- Output was directed to a destination such as a file or printer.
- An error occurred during the parsing or running of the request.

Properties of a Reporting Object

From the WebFOCUS Home Page or Legacy Home Page, you can view or edit the properties of a Reporting Object by right-clicking the object and selecting *Properties*. The Reporting Object Properties dialog box opens.

Components of a Reporting Object

A Reporting Object may contain any of the following types of components, which are run in the order of precedence, as listed:

- ☐ Preprocessing Other (custom code that runs before all other components)
- ☐ Joins
- ☐ DEFINE statements
- ☐ Filters, when applicable
- ☐ WHERE statements
- ☐ Report or chart templates
- ☐ Postprocessing Other (custom code that runs after all other components)

Users using the Reporting Object to create a report do not see the DEFINE statements, WHERE statements, or JOIN commands defined in the Reporting Object, which are issued automatically every time a user accesses the Reporting Object. However, the report or chart components, including headers, footers, and styling features, are visible to authorized users who can use them to create their own customized report.

The filters defined in the Filter component are applied only if the user of the Reporting Object activates them when the report or chart based on the Reporting Object is run.

Preprocessing Other Component

The Preprocessing Other component contains custom code that must run before all other components. You can use the text editor in the component to create and edit code or to paste the code that you have copied from another application.

To create or edit a Preprocessing Other component, do one of the following:

- ❑ Double-click the component.
- ❑ Select the component and click *Edit* on the ribbon.
- ❑ Right-click the component and select *Edit*.

The Preprocessing Other text editor appears.

See the *Creating Reports With WebFOCUS Language* manual for more information about using the WebFOCUS language to code procedures.

Note:

- ❑ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.
- ❑ Commands in the Preprocessing Other component should not return a displayable answer set.
- ❑ InfoAssist previews in the Report component and the Chart component are disabled if the Preprocessing Other component contains the syntax:

`-OLAP ON`

To avoid this issue, enable OLAP through the Reporting Object properties instead of the Preprocessing Other component. For more information on the Reporting Object properties, see *Properties of a Reporting Object*.

Reference: Considerations for Amper Auto Prompting With the Preprocessing and Postprocessing Other Components

When using Amper Auto prompting, users may be prompted to supply amper variable values for parameters that the private user content does not reference. These scenarios are directly related to the internal processing of reports created using a Reporting Object.

Auto prompting considerations and expected behavior must be understood when referencing amper variables within a Reporting Object. For information on the Amper Auto prompting facility, see the *Developing Reporting Applications* manual. The specification of values for the amper variables in the Reporting Object Other component using `-DEFAULT`, `-DEFAULTH`, or `-SET` commands will assign a default value for amper variables in a report request to avoid a FOC error for not specifying a value. A consideration for `-DEFAULTH` and `-SET` is that Amper Auto prompting does not prompt for amper variables that have values assigned using `-DEFAULTH` and `-SET`.

Whether a user is prompted by the Amper Auto prompting facility for amper variables assigned a default value using the `–DEFAULT` command is dependent on the setting of the WebFOCUS Client configuration parameter, `IBIMR_prompting`. When `IBIMR_prompting` is set to `XMLPROMPT`, users are prompted for amper variable values, and default values are displayed in fields in which the default values have been specified. When `IBIMR_prompting` is set to `XMLRUN`, users are not prompted for values when all amper variables have been assigned a default value. For more information on setting the `IBIMR_prompting` parameter, see the *WebFOCUS Security and Administration* manual.

Reference: **Creating a Reporting Object That Uses a HOLD File**

Suppose that your company has a data warehouse and you need a Reporting Object that uses an extract from that data warehouse. In your Preprocessing Other component, you create a HOLD file from the data warehouse, and then you use that HOLD file in each Reporting Object component. You can clear the JOIN command and delete the HOLD file in the Postprocessing Other component so that it is not mistakenly used again the next time that the Reporting Object is used.

This task has the following steps:

1. Create a HOLD file in the Preprocessing Other component.
2. Create a new Join component with two joins.
3. Use the Report component to create a new report in InfoAssist.
4. Clear the JOIN command and delete the HOLD file in the Postprocessing Other component.
5. Run the Reporting Object, and then view the object source to verify that the output is correct.
6. Verify that the HOLD file does not exist in the location in which it was created.

Example: **Creating a HOLD File With the Preprocessing Other Component**

1. Create a Reporting Object with the `baseapp` and `ibisamp` selected as the application paths and `employee` as the Master File.

For more information on creating a Reporting Object, see *Properties of a Reporting Object*.

2. Select the Preprocessing Other component and click *Edit*.
3. Type the following code:

```
APP HOLD IBISAMP
TABLE FILE EMPLOYEE
PRINT EMPLOYEE.EMPINFO.DEPARTMENT AS 'NEWDEP'
EMPLOYEE.EMPINFO.CURR_SAL AS 'NEWCURR_SAL'
BY EMPLOYEE.EMPINFO.EMP_ID AS 'EMP_ID'
BY EMPLOYEE.EMPINFO.HIRE_DATE AS 'NEWHIRE_DATE'
ON TABLE HOLD AS WINFILE FORMAT FOCUS INDEX EMP_ID
END
```

4. Click *Save*, and then close the text editor.
5. To verify that the component works properly, select the *Preprocessing Other* component and click *Run*.

The following output is produced:

```
0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
```

Example: Creating a New Join Component With Two Joins

1. Select the *Join* component and click *New*.

The Join component is prefilled with the data from the employee Master File.

2. Click *Add New*, select the winfile Master File, and click *OK*.
3. Click the *Add New* button, select the jobfile Master File, and click *OK*.
4. Click *OK* to close the Join tool, saving your changes.
5. Click *View Code* in the Reporting Object Quick Launch toolbar to review the code.

The following code for the Join component is displayed:

```
-*COMPONENT=Join_J001
JOIN EMPLOYEE.EMPINFO.EMP_ID IN IBISAMP/EMPLOYEE
TO UNIQUE WINFILE.SEG01.EMP_ID IN IBISAMP/WINFILE TAG J001 AS J001
END
-*COMPONENT=Join_J002
JOIN EMPLOYEE.PAYINFO.JOBCODE IN IBISAMP/EMPLOYEE
TO UNIQUE JOBFILE.JOBSEG.JOBCODE IN IBISAMP/JOBFILE TAG J002 AS J002
END
```

Example: Creating a Report With the Report Component

1. Double-click the *Report* component.

InfoAssist is launched.

2. Drag the NEWCURR_SAL measure from the Data pane to the canvas.

3. Drag the EMP_ID dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.
4. Drag the NEWHIRE_DATE dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.
5. Drag the NEWDEP dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.

The report is displayed as a table with four columns, sorted by EMP_ID.

6. Save the report and exit InfoAssist.
7. To verify that the component works properly, click *Run* on the Quick Launch toolbar.

The report that you created in InfoAssist is displayed in the browser.

Example: Deleting the Join in the Postprocessing Other Component

1. Select the *Postprocessing Other* component and click *Edit*.
2. Type the following:
3. Click *Save*, and then click *Exit*.
4. To verify that the Reporting Object works properly, click *Run* on the Quick Launch toolbar.

The report that you created in InfoAssist is displayed in the browser.

5. Right-click the report webpage and select *View source*.

Note: Depending on your browser, information may display differently.

6. Scroll to the bottom of the source window.

The following comment is displayed:

```
<!--
0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
0 HOLDING HTML FILE ON PC DISK ...
JOINS CURRENTLY ACTIVE
HOST                                CROSSREFERENCE
FIELD          FILE          TAG    FIELD          FILE          TAG AS ALL WH
-----
EMPLOYEE.EM>EMPLOYEE             WINFILE.SEG> WINFILE J0 J0 Y N
EMPLOYEE.PA>EMPLOYEE             JOBFIL.EJOB> JOBFIL J1 J1 Y N
0 NO JOINS CURRENTLY IN EFFECT
-->
```

Joins

A join is a temporary connection between two or more data sources that share at least one common field. After you join two data sources, each time that WebFOCUS retrieves a record from the first data source (the host file), it also retrieves the matching records from the second data source (the target file).

For more information on joining data sources, see the *WebFOCUS InfoAssist User's Manual*.

Note:

- ❑ When you join two FOCUS data sources, the target file field must be indexed or the join must be a WHERE-based join. If you attempt to link to a non-indexed target file, the Reporting Object tool offers you the opportunity to create a WHERE-based join. For more information on creating WHERE-based joins, see *Join Group* in the *WebFOCUS InfoAssist User's Manual*.
- ❑ Since every procedure creates a new session on the Reporting Server when it is run, the duration of your connection is always limited to a single procedure. Therefore, any join issued at the beginning of a procedure is in effect only for those report requests that are called in the same procedure.

Procedure: How to Create a Join

1. Right-click the *Joins* component and select *New*, or select the *Join* component and click *New* on the ribbon.

The Join tool opens, displaying the data source associated with the Reporting Object.

2. Create a join using the Join tool.

For more information on using the Join tool, see *Join Group* in the *WebFOCUS InfoAssist User's Manual*.

3. When you are finished, click *OK* to return to the Reporting Object tool.

Procedure: How to Delete a Join

To delete a join, right-click the join and select *Delete*, or select the join and click *Delete* on the Quick Launch toolbar.

Procedure: How to Rename a Join

1. In the Join tool, select a join by clicking its connector line, and then click *Edit* on the Join toolbar.

The Edit Join dialog box opens.

2. Type a new description in the Description box and click *OK* to return to the Join tool.

The new description appears under the Join component in the Reporting Object tool. The internal name used for the join remains the same name assigned to the join when you created it.

***Procedure:* How to View or Edit Join Syntax in a Text Editor**

1. Select the join and click *Edit* on the ribbon, or right-click the join and select *Edit*.

The join code is displayed in a text editor.

2. Make the desired changes and click *Save* to return to the Reporting Object tool. To exit without making any changes, click *Close*.

Virtual Fields (DEFINE Statements)

A virtual field is a field whose value is not stored in the data source but can be calculated from the data that is there. A virtual field takes up no storage space. It is created only when a user accesses the Reporting Object that includes the virtual field.

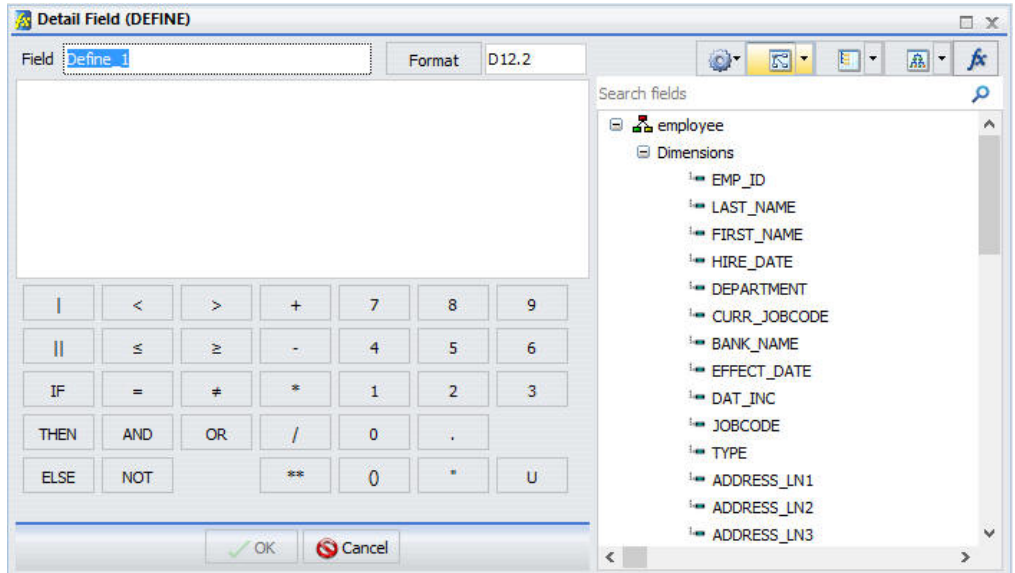
You use the Define tool to create a virtual field. Using this tool, you specify the virtual field name and format, and the expression that defines the field. An expression enables you to combine fields, constants, predefined functions, and operators into an operation that produces a single value. When you define a virtual field, you must specify a field format type, length, and appropriate display options.

For more information about defining fields, see *Data Tab* in the *WebFOCUS InfoAssist User's Manual*.

***Procedure:* How to Create a Virtual Field**

1. Right-click the *Defines* component and select *New*, or select the *Define* component and click *New* on the ribbon.

The Define tool dialog box opens, as shown in the following image.



2. Create a virtual field using the Define tool.

For more information about the Define tool, see *Data Tab* in the *WebFOCUS InfoAssist User's Manual*.

3. Click *OK* to save the virtual field and return to the Reporting Object tool.

The virtual field now appears in the field list when a user accesses this Reporting Object.

Note:

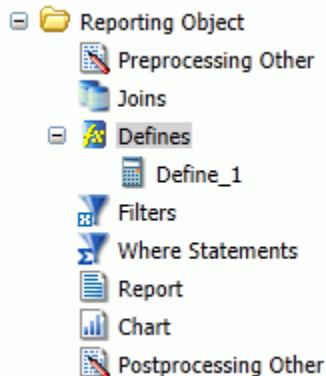
- ❑ The field list shown in the Define tool is not updated to display new virtual fields until you exit from the Define tool and reopen it. If you are creating a virtual field (DEFINE statement) that uses a previously created virtual field in the expression, you must save the first virtual field before creating the second one.

To save the first virtual field, exit from the Define tool by clicking *OK*. Reopen the Define tool to create the second field. Alternatively, you can type the name of the first virtual field in the expression instead of selecting it from the field list. In this case, you do not need to exit and reopen the Define tool.

- ❑ Since every procedure creates a new session on the Reporting Server when it is run, the duration of your connection is always limited to a single procedure. Therefore, any DEFINE statements issued at the beginning of a procedure are in effect only for those report requests that are called in the same procedure.

Procedure: How to Edit a Virtual Field

Existing virtual fields appear under the Defines node, as shown in the following image.



1. Right-click the virtual field that you want to edit and select *Open*, or select the virtual field and click *Open* on the ribbon.

The Define tool dialog box opens, displaying the selected field.

2. Make changes to the field name, expression, or format, and click *OK* to return to the Reporting Object tool.

Procedure: How to View or Edit a Virtual Field in the Text Editor

1. Right-click the virtual field that you want to view or edit as text and select *Edit*, or select the virtual field and click *Edit* on the ribbon.

The Text Editor opens, displaying the selected field.

2. Make changes to the field name, expression, or format, and click *OK* to return to the Reporting Object tool.

Procedure: **How to Delete a Virtual Field**

1. Right-click the virtual field that you want to delete and select *Delete*, or select the virtual field and click *Delete* on the ribbon.
2. To delete all virtual fields at once, right-click the *Defines* component and select *Delete All*, or select the component and click *Delete All* on the ribbon.

Filters

Filters enable users to quickly select predefined criteria that limit the data included in a report or chart. Filters are selection criteria (WHERE statements) that you create for users, who then select the filters needed to limit the data in a report or chart without having to create their own selection criteria.

In order to create a filter, you must create the filter group and define the filters that make up the group.

Note: The Undo and Redo functions are not available for the Filter component until you have created at least one filter.

For more information about filters, see the *Using Filters to Customize the Display of Data* topic in the *WebFOCUS InfoAssist User's Manual*.

Procedure: **How to Create a Filter Group**

1. Right-click the *Filters* component and select *New*, or select the *Filter* component and click *New* on the ribbon.

The Reporting Object Filter Group dialog box opens.

2. In the Filter Group Name field, type a descriptive name for the filter group folder.

Make the filter group name as explicit as possible, because users depend on this name to select the correct filter to apply to their reports.

3. Click *OK*.

You are returned to the Reporting Object tool. The filter group folder appears below the Filter component node.

Procedure: How to Define a Filter

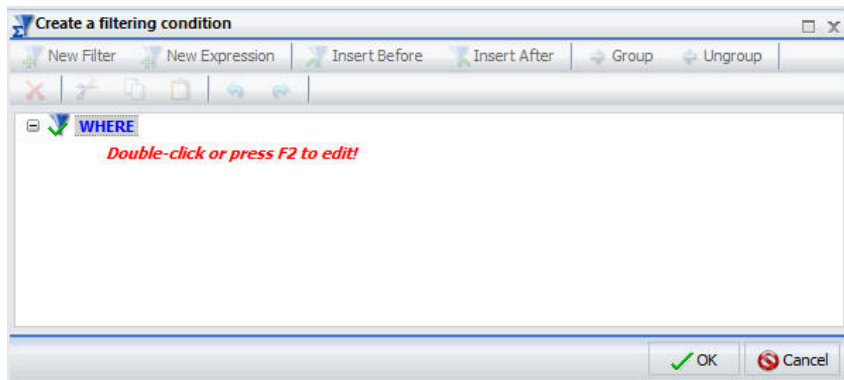
1. Right-click the Filter group to which you would like to add a filter and select *New*, or select the Filter group folder and click *New* on the Quick Launch toolbar.

The Reporting Object Filter dialog box opens.

2. In the Filter Name field, type a descriptive name for the filter and click *Add New* if you plan to create multiple filters, or click *OK* if you plan to create only one filter.

Make the filter names as explicit as possible, because users depend on these names to select the correct filter to apply to their reports.

The Advanced Filter dialog box opens, as shown in the following image.



3. Use the Advanced Filter dialog box to create the filter.

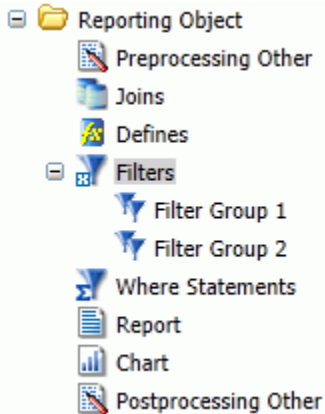
For more information about defining filters, see *Data Tab* in the *WebFOCUS InfoAssist User's Manual*.

4. When you have created the filter, click *OK*.

If you clicked *Add new* in step 2, the *New Filter* dialog box opens. If you clicked *OK* in step 2, you are returned to the Reporting Object tool.

Procedure: How to Edit a Filter

Existing filters appear under the Filter group beneath the Filters node, as shown in the following image.



1. Right-click the filter that you want to edit and select *Open*, or select the filter and click *Open* on the ribbon.

The Advanced Filter dialog box opens, displaying the selected filter.

2. Make your changes and click *OK* to return to the Reporting Object tool.

Procedure: How to Rename a Filter or Filter Group

1. Right-click the filter or filter group that you want to rename and select *Properties*, or select the filter or filter group and click *Properties* on the ribbon.
2. Type the new filter or filter group name in place of the current one and click *OK*.

Procedure: How to Delete a Filter or a Filter Group

1. Right-click the filter or filter group that you want to delete and select *Delete*, or select the filter or filter group and click *Delete* on the ribbon.
2. To delete all filters at once, right-click the *Filter* component and select *Delete All*, or select the component and click *Delete All* on the ribbon.

Procedure: How to View or Edit a Filter in the Text Editor

1. Right-click the filter that you want to view or edit as text and select *Edit*, or select the filter and click *Edit* on the ribbon.

The text editor opens, displaying the selected filter.

2. Make your changes and click *OK* to return to the Reporting Object tool.

Reference: Filter Considerations With Amper Auto Prompting

When Amper Auto prompting is used (*Prompt for Parameters* is selected in the Reporting Object properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Selection Criteria (WHERE Statements)

WHERE statements or selection criteria, restrict the data retrieved to only those records that meet the conditions that you specify. Filters are selection criteria that run when the user selects the filter in WebFOCUS. Other selection criteria run when the user opens the Reporting Object, preventing data values that do not meet the criteria from being available to the user.

For more information on WHERE statements, see *Field Tab* in the *WebFOCUS InfoAssist User's Manual*.

Procedure: How to Create Selection Criteria

1. Right-click the *Where Statements* component and select *New*, or select the component and click *New* on the ribbon.

The New Filter dialog box opens.

2. Double-click the red text or press F12 to edit the WHERE statement.

For more information on creating selection criteria, see the *Using Filters to Customize the Display of Data* topic in the *WebFOCUS InfoAssist User's Manual*.

3. When you have created the selection criterion, click *OK* to return to the Reporting Object tool.

Report Component

The Report component creates a report template and saves it in a Reporting Object. Authorized users can use the report template to create a report that suits their needs and then save the new report.

To create a report template, double-click the *Report* component, or right-click the component and select *Open*. InfoAssist opens, allowing you to create a report template.

For more information on using InfoAssist, see the *WebFOCUS InfoAssist User's Manual*.

Note:

- ☐ To open the report source code in the text editor instead of InfoAssist, right-click the *Report* component and select *Edit*. Manual changes to the code may make the report incompatible with InfoAssist.
- ☐ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.
- ☐ If the Reporting Object contains both a report and a chart, the user is asked whether to run the object as a report or chart. The Reporting Object cannot be run simultaneously as both.
- ☐ When Amper Auto prompting is used (*Prompt for Parameters* is selected in the Reporting Objects properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Chart Component

The Chart component works exactly like the Report component. The Chart component creates a chart template and saves it in a Reporting Object. Authorized users can use the chart template to create a chart that suits their needs and then save the new chart.

To create a chart template, double-click the *Chart* component, or right-click the component and select *Open*. InfoAssist opens, allowing you to create a chart template.

For more information on using InfoAssist, see the *WebFOCUS InfoAssist User's Manual*.

Note:

- ☐ To open the chart source code in the text editor instead of InfoAssist, right-click the *Chart* component and select *Edit*. Manual changes to the code may make the chart incompatible with InfoAssist.
- ☐ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.
- ☐ If the Reporting Object contains both a report and a chart, the user is asked whether to run the object as a report or chart. The Reporting Object cannot be run simultaneously as both.

- ❑ When Amper Auto prompting is used (*Prompt for Parameters* is selected in the Reporting Object properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of private reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Postprocessing Other Component

The Postprocessing Other component contains custom code that must run after all other components. You can use the text editor in the component to create and edit code, or to paste the code that you have copied from another application.

To create or edit a Postprocessing Other component, double-click the component, or select the component and click *Edit* on the ribbon. Alternatively, right-click the component and select *Edit*. The Postprocessing Other dialog box opens.

See the *Creating Reports With WebFOCUS Language* manual for more information about using the WebFOCUS language to code procedures.

Note:

- ❑ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.
- ❑ Commands in the Postprocessing Other component should not return a displayable answer set.
- ❑ InfoAssist previews in the Report component and the Chart component are disabled if the Postprocessing Other component contains the syntax:

```
-OLAP ON
```

To avoid this issue, enable OLAP through the Reporting Object properties instead of the Postprocessing Other component. For more information on the Reporting Object properties, see *Properties of a Reporting Object*.

For information on Amper Auto Prompting, see *Considerations for Amper Auto Prompting With the Preprocessing and Postprocessing Other Components*.

Installing the Retail Samples Domain and Business Intelligence Portal

This topic describes how to install, configure, and use the Retail Samples domain and Business Intelligence (BI) Portal that is packaged with WebFOCUS Release 8.2 Version 01M and higher.

In this chapter:

- ☐ [Overview](#)
 - ☐ [Installing the Retail Samples Package](#)
 - ☐ [Creating the Retail Samples Database and Metadata](#)
 - ☐ [Importing Sample Users and Exploring Retail Samples](#)
 - ☐ [Exploring Retail Samples Using the Mobile Viewer](#)
 - ☐ [Uninstalling, Hiding, and Unpublishing Retail Samples](#)
-

Overview

The Retail Samples package consists of a sample WebFOCUS domain full of content that was created using InfoAssist, App Studio, WebFOCUS Designer, and a related Business Intelligence (BI) Portal. You can also view Retail Samples content in WebFOCUS mobile products and schedule this content for distribution using ReportCaster, as explained in this section.

Installing the Retail Samples Package

As of WebFOCUS Release 8.2 Version 01M, and higher, the Retail Samples package is available in the following path of your installation:

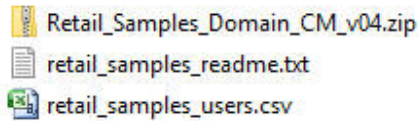
```
drive:\ibi\WebFOCUS82\samples\retail_samples  
\Retail_Samples_Domain_CM_vnn.zip
```

where:

nn

Is the latest file version number.

An example of the contents of the retail_samples folder are shown in the following image.



This example contains the following components:

- ☐ **retail_samples_readme.txt.** Documentation that explains how to import the Retail Samples content and create the WebFOCUS Retail database.
- ☐ **Retail_Samples_Domain_CM_vnn.zip.** Change Management (CM) import package with the Retail Samples domain content.
- ☐ **retail_samples_users.csv.** A comma-separated values (CSV) file containing predefined sample users.

Procedure: How to Install the Retail Samples Package

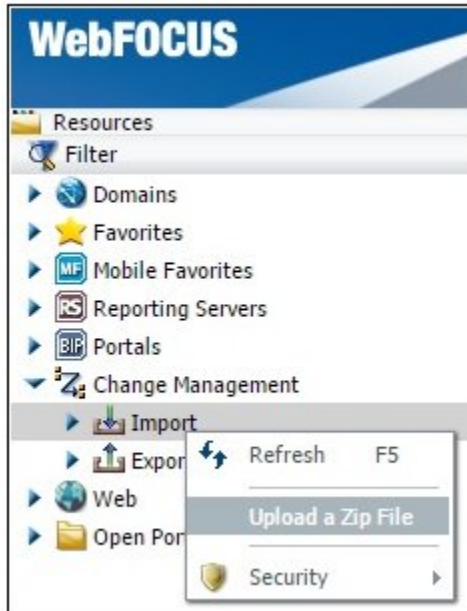
1. Sign in to WebFOCUS as an Administrator, using the following credentials:

☐ User Name: *admin*

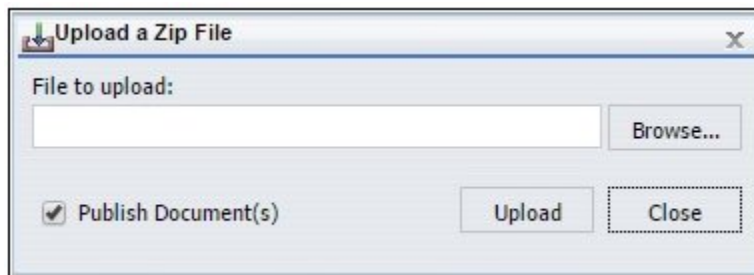
☐ Password: *admin*

Note: If you are upgrading to the WebFOCUS Release 8.2 Version 03, you must expand the existing Retail Samples folder in the Resources tree and delete the Search folder prior to proceeding to the next step. This will remove the unsupported files from the repository and ensure the correct deployment of the new Retail Samples package.

2. On the Legacy Home Page, in the Resources tree, expand the *Change Management* node, right-click the *Import* node, and then select *Upload a Zip File*, as shown in the following image.

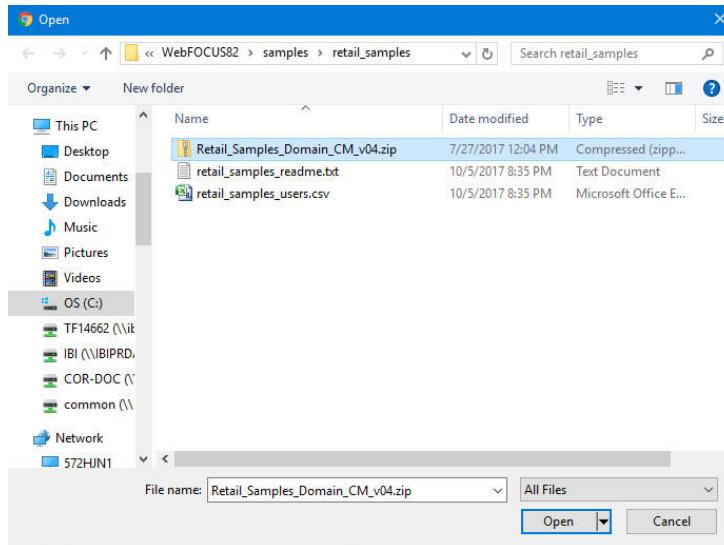


The Upload a Zip File dialog box opens, as shown in the following image.



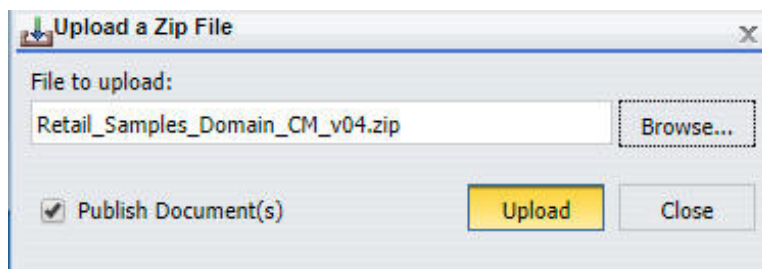
3. Click *Browse*.

The Open dialog box displays, as shown in the following image.



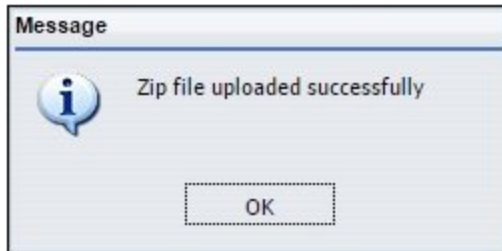
4. Navigate to the following path of your WebFOCUS installation:
`drive:\ibi\WebFOCUS82\samples\retail_samples`
5. Select the *Retail_Samples_Domain_CM_vnn.zip* file and click *Open*.

You are returned to the Upload a Zip File dialog box, as shown in the following image.



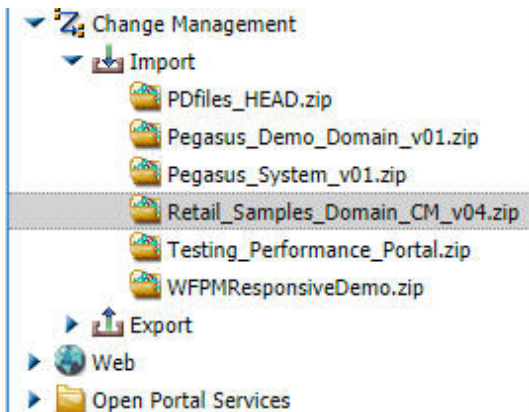
6. Ensure that the *Publish Document(s)* option is selected and click *Upload*.

A message displays, indicating the zip file uploaded successfully, as shown in the following image.



7. Click OK.

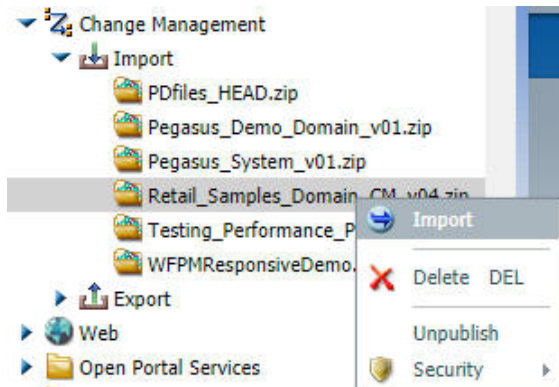
Under Change Management in the Resources tree, the Retail_Samples_Domain_CM_vnn.zip file is now listed under the Import node, as shown in the following image.



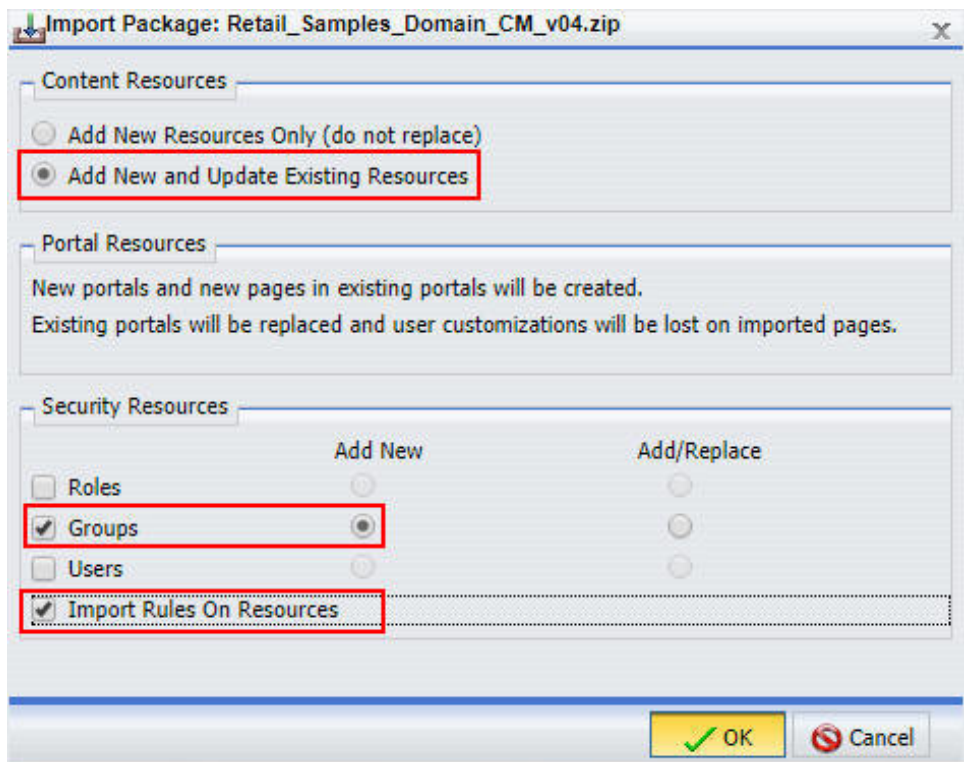
Note: The version number packaged with your installation may be different.

8. Close the Upload a Zip File dialog box.

9. Right-click the *Retail_Samples_Domain_CM_vnn.zip* file and click *Import*, as shown in the following image.



The Import Package: *Retail_Samples_Domain_CM_vnn.zip* dialog box opens, as shown in the following image.



10. Select the following options in this dialog box:

In the Content Resources section:

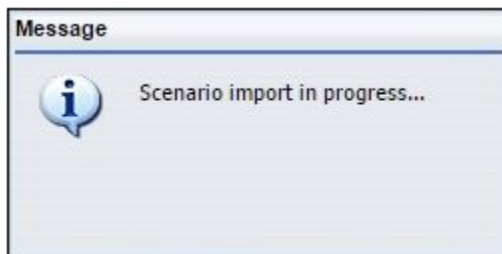
- ☐ *Add New and Update Existing Resources*

In the Security Resources section:

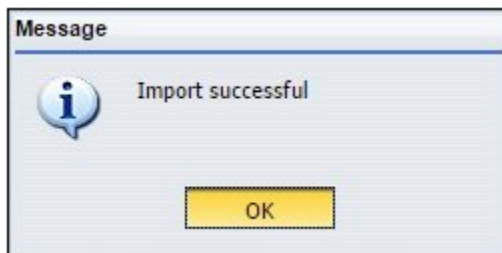
- ☐ *Groups* check box and *Add New* radio button
- ☐ *Import Rules On Resources*

11. Click *OK*.

The Scenario import in progress message displays, as shown in the following image.

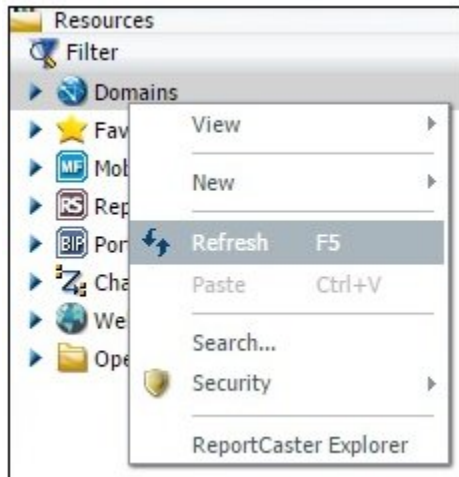


When the import process has completed, the Import successful message displays, as shown in the following image.



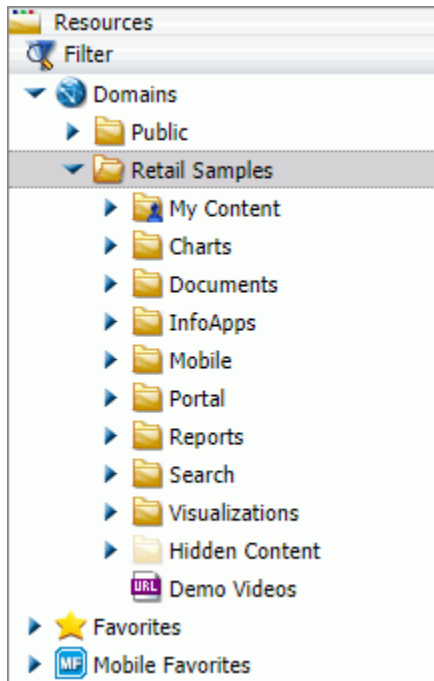
12. Click *OK*.

13. In the Resources tree, right-click the *Domains* node and select *Refresh*, as shown in the following image.



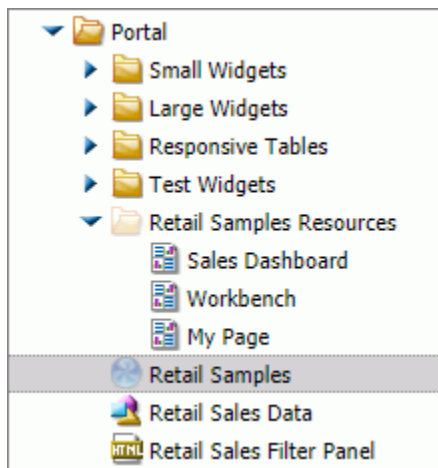
14. Expand the *Domains* node.

Ensure that the new Retail Samples domain node is listed, as shown in the following image.

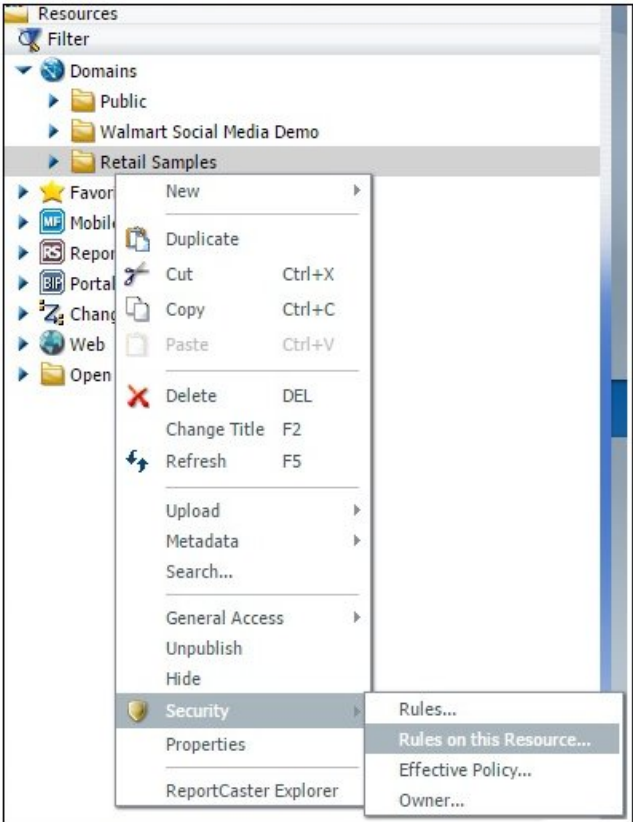


15. Expand the *Portals* folder inside the Retail Samples domain.

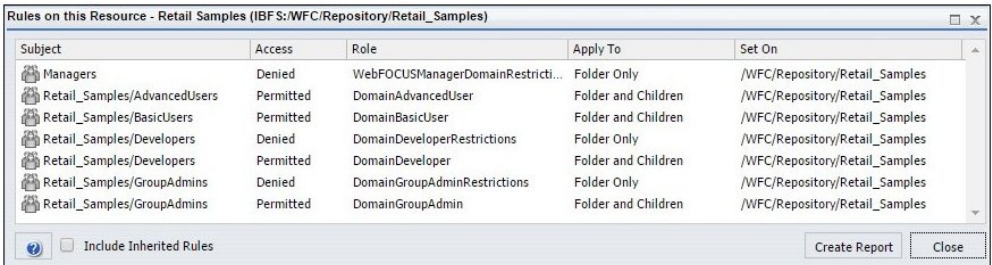
Ensure that the Retail Samples collaborative portal is listed, as shown in the following image.



16. Under Domains, right-click the new *Retail Samples* domain node, point to *Security*, and then click *Rules on this Resource*, as shown in the following image.



The Rules on this Resource: Retail Samples (IBFS:/WFC/Repository/Retail_Samples) dialog box opens, as shown in the following image.



This verifies that the security rules were successfully created for the new Retail Samples domain.

17. Click *Close*.

Before you can successfully run the Retail Samples content, you need to create the WebFOCUS Retail database and metadata.

Creating the Retail Samples Database and Metadata

This section describes how to create the WebFOCUS Retail database and metadata that is used by content in the Retail Samples domain. You may use any of the available WebFOCUS Reporting Server data adapter options that are available to you. For demonstration purposes, Microsoft SQL Server is used in this procedure.

Procedure: How to Create the Retail Samples Database and Metadata

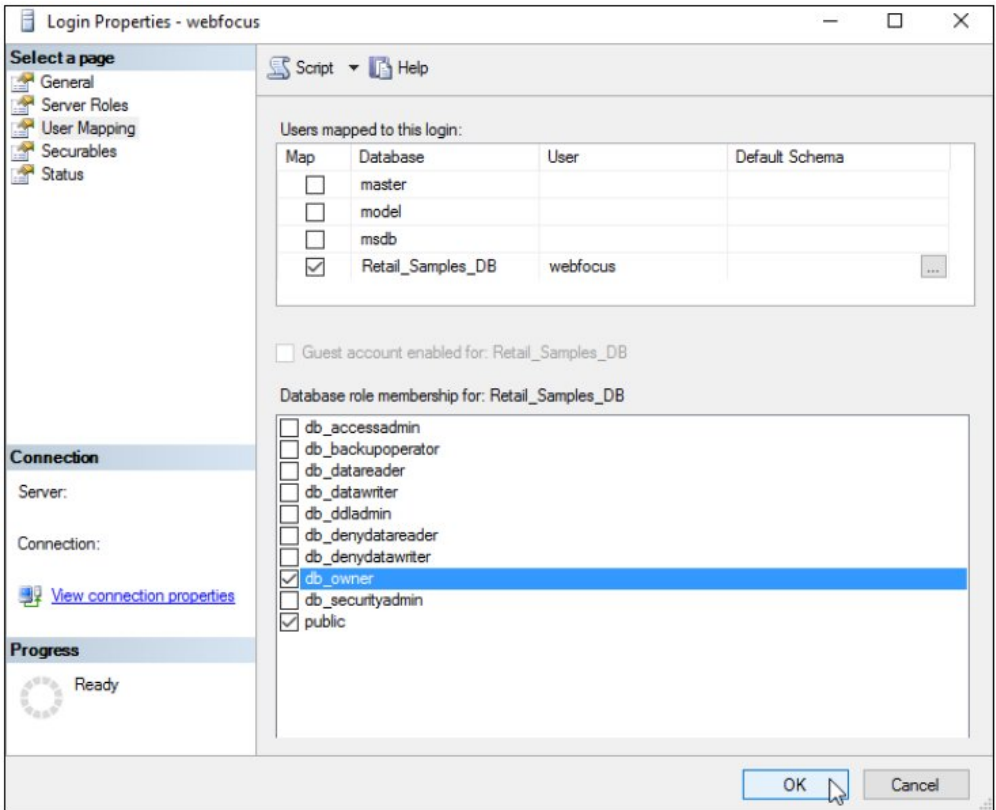
1. Create a database where you will load the sample data.

The example in this procedure uses Microsoft SQL Server Management Studio for this task. You will also need to identify a service account that has read/write access to the database. The following values are used in this example:

☐ **Database Name:** Retail_Samples_DB

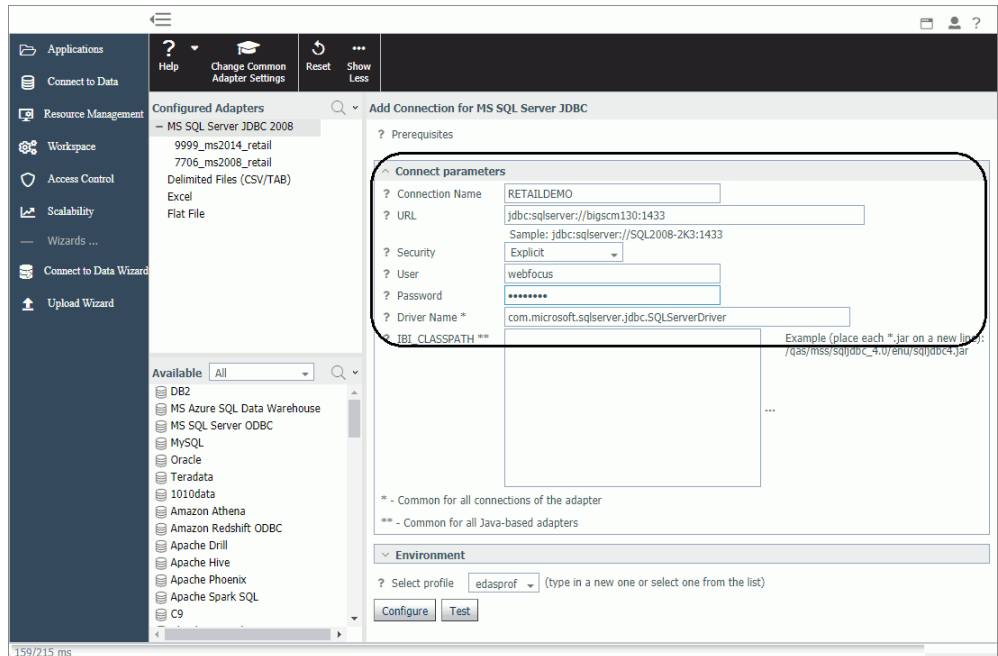
☐ **SQL Server Account:** webfocus

In the Login Properties - webfocus dialog box, shown in the following image, the service account db_owner role is assigned to the Retail_Samples_DB database to ensure that this role can create tables and read the data.



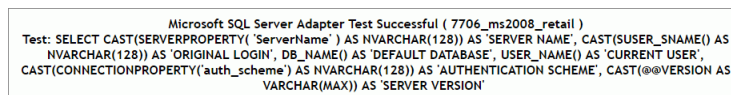
- 2. Sign in to the WebFOCUS Reporting Server Console as an Administrator.
- 3. Open the *Connect to Data* view and create a new Adapter, which will be used to access the Retail Samples database.

The Add Connection for MS SQL Server JDBC dialog box opens, as shown in the following image.



- a. You can specify any value in the Connection Name field.
 - b. Configure the remaining settings accordingly for your environment and data source.
4. Click **Test**.

A message displays indicating that the adapter test was successful, as shown in the following image.

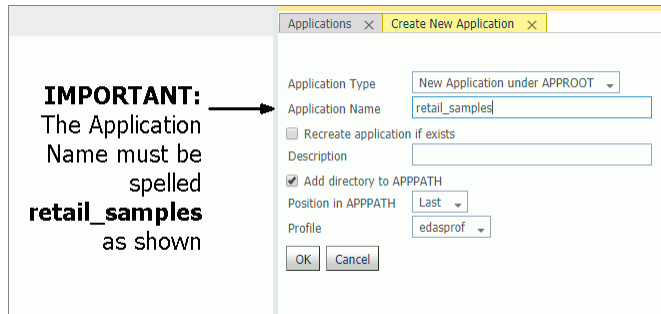


If you do not see a message displayed confirming success, then you must resolve the issue before continuing.

5. Click **Configure** on the bottom of the screen.
6. Open the *Applications* view.
7. In the Ribbon, click **New** and select *Application Directory*.

The Create New Application tab opens.

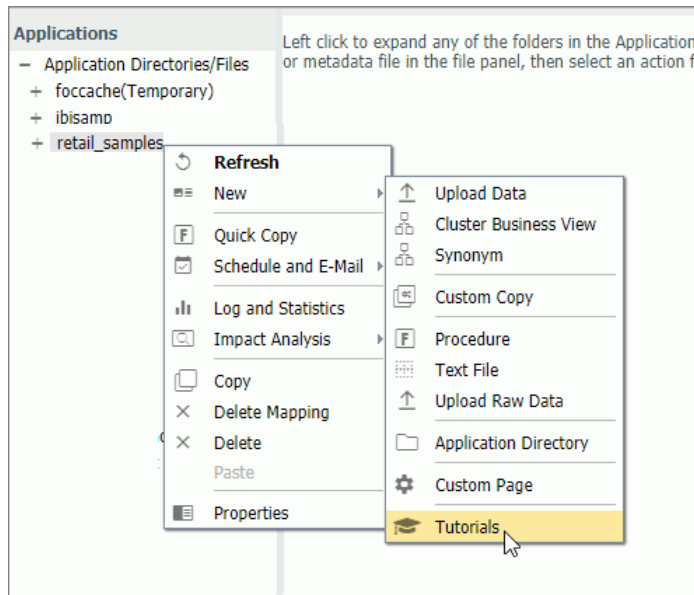
8. Replace the text in the Application Name field with *retail_samples*, as shown in the following image.



Note: You must enter the Application Name with this exact spelling because the Retail Samples content is referencing metadata from this Application folder. If you are familiar with the APP MAP command, you can use this approach to map a different Application folder to the required name.

You do not need to provide a Description but we recommend leaving the Add directory to APPPATH box checked to simplify the configuration procedure.

9. Click *OK* to create the Application Directory.
10. Expand the *Application Directories/Files* folder in the left pane, right-click the *retail_samples* application, select *New*, and then click *Tutorials*, as shown in the following image.



The Create Tutorial Framework tab opens, as shown in the following image.

The screenshot shows a 'Create Tutorial Framework' dialog box. It has a title bar with two tabs: 'Applications' and 'Create Tutorial Framework'. The 'Create Tutorial Framework' tab is active. The dialog contains the following fields and options:

- Tutorial:** A dropdown menu showing 'WebFOCUS - Retail Demo'.
- Select DBMS:** A dropdown menu showing 'MS SQL Server JDBC'.
- Select Connection:** A dropdown menu showing 'RETAILDEMO'.
- Prefix for SQL Tables:** A text input field containing 'wrd'. To its right, a hint text reads 'wrd or mylib/wrd or xxx.wrd'.
- Data Security (DBA):** A dropdown menu showing 'None'.
- Tutorial Data Volume Limit:** A dropdown menu showing 'Large (285MB)'.
- Application:** A text input field containing 'retail_samples'.
- Create:** A button at the bottom left.

11. Perform the following steps:

- Select *WebFOCUS - Retail Demo* from the Tutorial drop-down list.
- Select *RETAILDEMO* from the Select Connection drop-down list.
- Optionally, you can change the value in the Prefix for SQL Tables field that will be applied to the tables created in your database.
- It is recommended leaving the value in the Data Security (DBA) drop-down list set to *None* for your initial exploration of Retail Samples.

Later you can rerun this tool and explore the WebFOCUS Dynamic Data Security features including support for row and column-level security.

- It is recommended to leave the value in the Tutorial Data Volume Limit drop-down list set to *Large (285MB)* if you have the space because the Retail Samples content is designed to be used with the full 285MB load of the database.

Optionally, you can choose the *Medium (9MB)* load, but your content will look somewhat different than what is shown in this document.

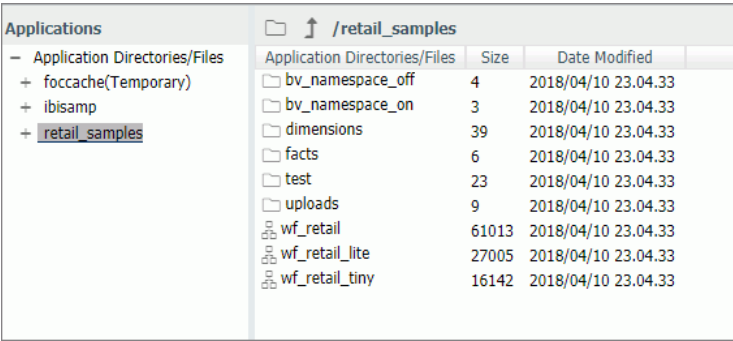
- Click *Create*.

A confirmation dialog box displays.

12. Click *OK*.

The full data load process generally takes a minute and a half or more to complete.

13. When this process has finished, you will see three cluster synonyms and six subfolders under the retail_samples application directory, as shown in the following image.



The screenshot shows the 'Applications' window with the left pane displaying a tree view where 'retail_samples' is selected under 'Application Directories/Files'. The right pane shows the contents of the '/retail_samples' directory as a table with columns for 'Application Directories/Files', 'Size', and 'Date Modified'.

Application Directories/Files	Size	Date Modified
Application Directories/Files		
bv_namespace_off	4	2018/04/10 23.04.33
bv_namespace_on	3	2018/04/10 23.04.33
dimensions	39	2018/04/10 23.04.33
facts	6	2018/04/10 23.04.33
test	23	2018/04/10 23.04.33
uploads	9	2018/04/10 23.04.33
wf_retail	61013	2018/04/10 23.04.33
wf_retail_lite	27005	2018/04/10 23.04.33
wf_retail_tiny	16142	2018/04/10 23.04.33

The Retail Samples domain content was created from the wf_retail_lite cluster synonym, which represents a single fact star schema representation of the data. The wf_retail cluster synonym is a more advanced multi-fact schema and wf_retail_tiny is a simpler structure.

14. Verify that your sample database was created properly by right-clicking wf_retail_lite and selecting *Sample Data* from the shortcut menu.

Reference: What’s Next?

- ❑ Assuming that you are following the topics in order, you will have already imported the Retail Samples domain content into your WebFOCUS repository. If not, then complete that step now.
- ❑ Assuming your WebFOCUS Client is configured to communicate with the WebFOCUS Reporting Server, you are ready to explore the Retail Samples demo content and learn more about WebFOCUS. If you are new to security, then one option you may wish to consider is a trusted connection to the WebFOCUS Reporting Server.
 1. In the WebFOCUS Reporting Server Console, click the *Access Control* tab. Right-click your PTH security provider and select *Properties*. Set the following:
`trust_ext=y`

Save your change and then restart your server.
 2. In the WebFOCUS Administration Console, expand *Reporting Servers*, *Server Connections*, and double-click your server node. Under *Security*, select the *Trusted* option and then save your change. You do not need to restart WebFOCUS.

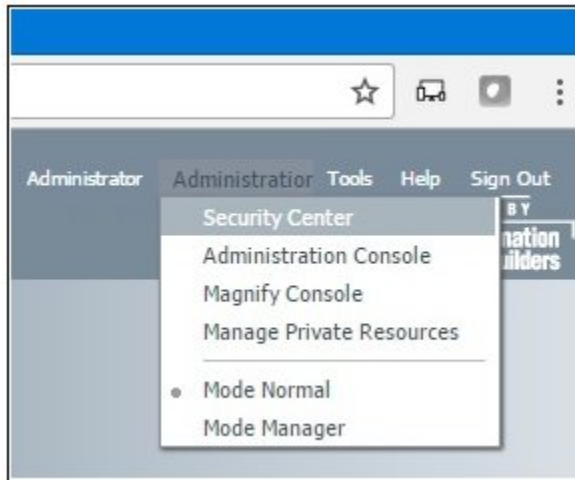
3. This should be sufficient to avoid a server sign in challenge and set you up for exploring other security scenarios. For more information on configuring WebFOCUS Reporting Server security, see the WebFOCUS Reporting Server technical content or contact Information Builders Support.

Importing Sample Users and Exploring Retail Samples

This section describes how to import several sample users for testing/verification purposes and further explore the Retail Samples content.

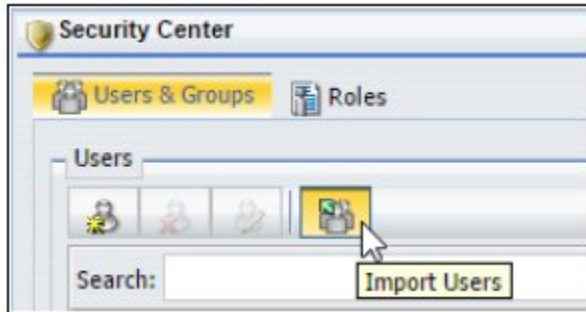
Procedure: How to Import Sample Users and Explore Retail Samples

1. Ensure that you are signed in to WebFOCUS as an Administrator.
2. From the Menu bar, click *Administration* and then click *Security Center*, as shown in the following image.



The Security Center opens.

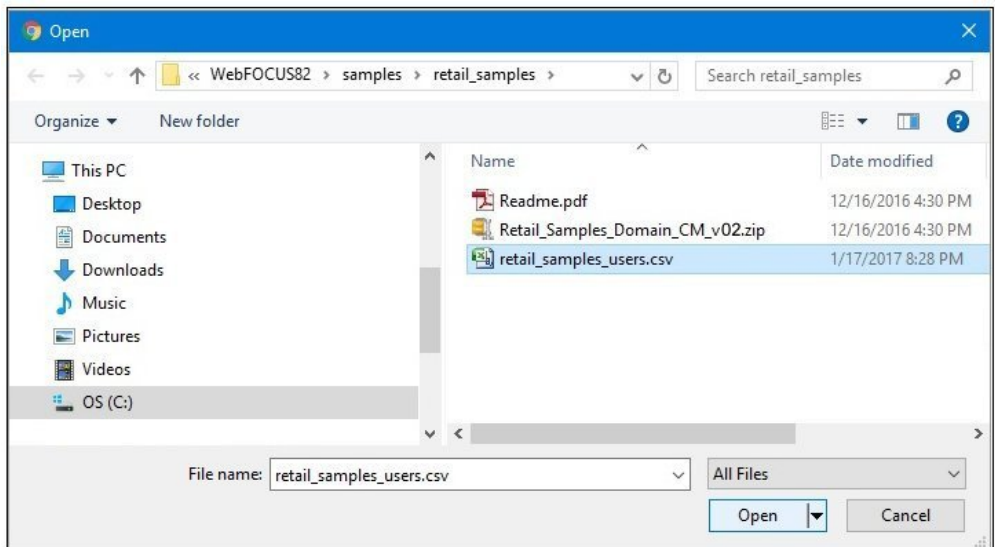
3. Click the *Import Users* icon, as shown in the following image.



The Import Users dialog box opens.

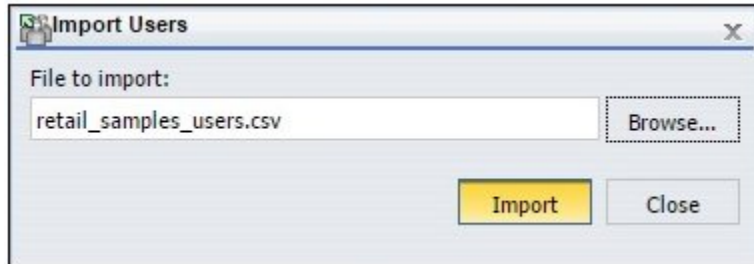
4. Click *Browse*.

The Open dialog box displays, as shown in the following image.



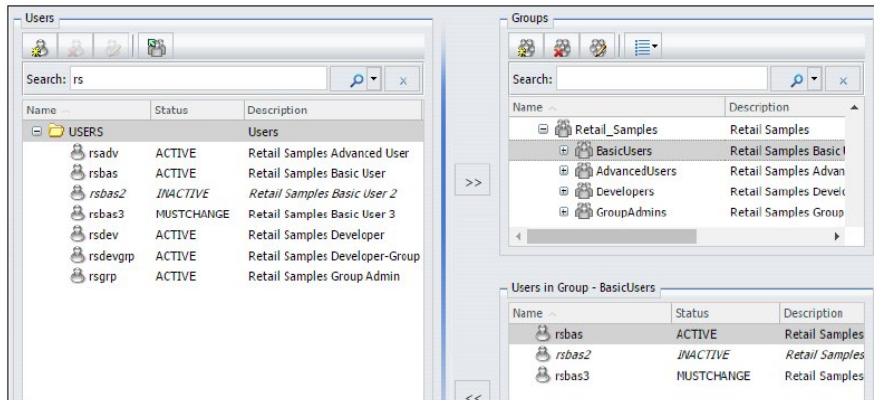
5. Click *Browse* and navigate to the following path of your WebFOCUS installation:
`drive:\ibi\WebFOCUS82\samples\retail_samples`
6. Select the `retail_samples_users.csv` file and click *Open*.

You are returned to the Import Users dialog box, as shown in the following image.



7. Click *Import*.

The Security Center is updated and shows the sample users that have been imported from the `retail_samples_users.csv` file, as shown in the following image.



8. Close the Security Center and sign out of WebFOCUS.
9. On the sign-in page, try signing in as different users such as `rsbas`, `rsadv`, and `rsdev` to see how they have increasing privileges in WebFOCUS. By default, they are configured with `password` as their password.

Also, try running the Retail Samples BI Portal, which you can run from the Resources tree on the Home page or by entering the following URL directly in your browser:

http://yourhost:port/ibi_apps/bip/portal/Retail_Samples

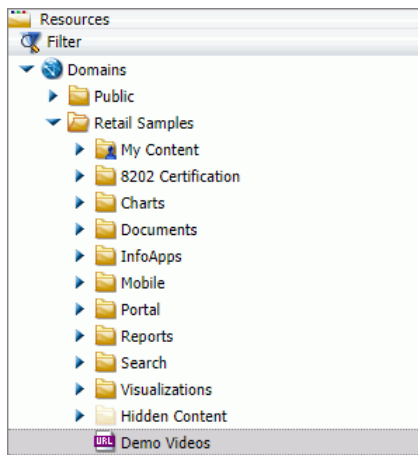
Reference: What's Next?

- ❑ The Retail Samples domain is configured to open automatically from the Legacy Home Page and WebFOCUS Home Page. If you wish, you can disable this feature in the Properties for the domain. Right-click the domain to access these properties.

- ❑ You can also provide everyone basic user access to the Retail Samples domain by right-clicking the Retail Samples domain, and changing the General Access setting from Domain Groups to *All Users*, as shown in the following image. You can make this change only from the Legacy Home Page.



- ❑ If you want everyone to have access to the Retail Samples BI Portal, from the Legacy Home Page, in the Resources tree, right-click the *Retail Samples* BI Portal, select *Security* and then *Rules*. In the Security Rules - Retail Samples dialog box, select *EVERYONE*, *DomainBasicUsers*, *Permit*, and then click *OK*.
- ❑ By default, the Retail Samples domain has been configured to limit metadata retrieval to the retail_samples application folder on the WebFOCUS Reporting Server. This simplifies the experience for users and developers who may wish to create content in the domain. If you would like users to have access to other metadata when creating content in this domain, you can make this change from the Server tab, when you access the properties of the Retail Samples domain.
- ❑ The Retail Samples domain also includes a Demo Videos link if you would like to learn how the demo content was created. The following image shows the Retail Samples folder and Demo Videos in the Resources tree of the Legacy Home Page.



- ❑ You can edit the *retail_samples_users.csv* file using a text editor or with Microsoft Excel. However, this file must remain saved as a comma separated values (CSV) file for it to be usable by WebFOCUS.

	A	B	C	D	E	F
1	rsbas	password	Retail Samples Basic User	rsbas@domain.com	ACTIVE	Retail_Samples/BasicUsers
2	rsadv	password	Retail Samples Advanced User	rsadv@domain.com	ACTIVE	Retail_Samples/AdvancedUsers
3	rsdev	password	Retail Samples Developer	rsdev@domain.com	ACTIVE	Retail_Samples/Developers
4	rsgrp	password	Retail Samples Group Admin	rsgrp@domain.com	ACTIVE	Retail_Samples/GroupAdmins
5	rsdevgrp	password	Retail Samples Developer-Group	rsdevgrp@domain.com	ACTIVE	Retail_Samples/Developers;Retail_Samples/GroupAdmins
6	rsbas2	password	Retail Samples Basic User 2	rsbas@domain.com	INACTIVE	Retail_Samples/BasicUsers
7	rsbas3	password	Retail Samples Basic User 3	rsbas@domain.com	MUSTCHANGE	Retail_Samples/BasicUsers

1. The first column is the user ID to be created.
2. The second column is the initial password (the text *password* can also be deleted for no password, which is allowed to simplify testing, but the column cannot be deleted).
3. The third column is the user's Description, shown in the Portal menu bar.
4. The fourth column is optional and is the email address of the user.
5. The fifth column is the user account status, which may be ACTIVE, INACTIVE, or MUSTCHANGE.
6. The final column indicates what groups the user should be added to. Multiple groups can be separated with a semi-colon as shown in the fifth row. These Group Names are case-sensitive and the group must exist.

Exploring Retail Samples Using the Mobile Viewer

If you are licensed for WebFOCUS Mobile products, then you can use the Mobile Viewer to access content from any folder in your WebFOCUS repository from a simple, touch-based interface.

Access the following URL from your mobile device:

http://yourserver:port/ibi_apps/mv/path_to_your_folder

where:

[yourserver](#)

Is the host name or IP address of the system that is hosting WebFOCUS.

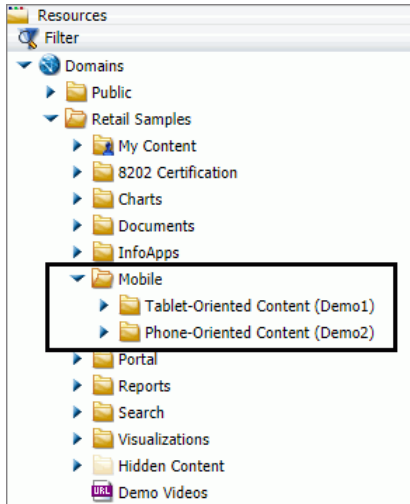
[port](#)

Is the port number that is being used by WebFOCUS on the deployed system.

[path_to_your_folder](#)

Is the path to your WebFOCUS content in your WebFOCUS repository.

The Retail Samples domain includes a Mobile folder with two subfolders, as shown in the following image.



Each subfolder includes shortcuts to content residing elsewhere in the domain. Update the URL with your server information, email these two URLs to yourself, and then access the Mobile Viewer feature from your mobile devices:

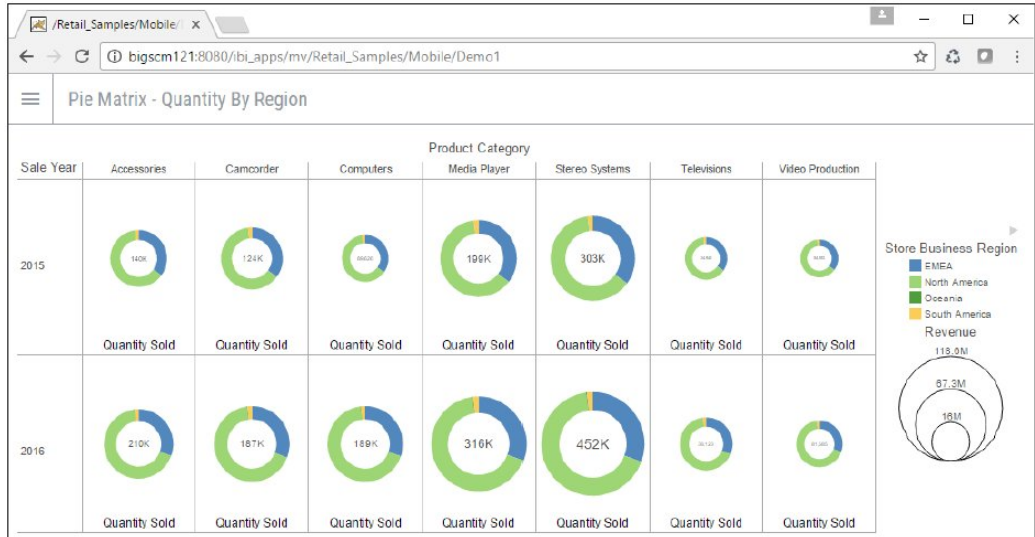
☐ **Demo 1 for Tablets:**

http://yourserver:port/ibi_apps/mv/Retail_Samples/Mobile/Demo1

☐ **Demo 2 for Phones:**

http://yourserver:port/ibi_apps/mv/Retail_Samples/Mobile/Demo2

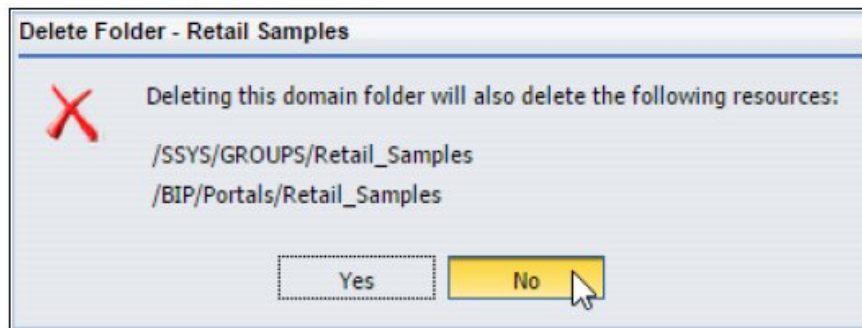
The following image shows the Pie Matrix - Quantity By Region chart displayed in a browser on a tablet.



Uninstalling, Hiding, and Unpublishing Retail Samples

When you are finished using the Retail Samples domain, you can delete or unpublish this domain. Deleting the Retail Samples domain will also delete the Retail Samples groups and BI Portal, but not the retail_samples application folder on the WebFOCUS Reporting Server.

The following image shows the Delete Folder - Retail Samples dialog box.



You can always delete the Retail Samples domain and re-import this domain, as described in [Installing the Retail Samples Package](#) on page 259.

You can also hide the Retail Samples domain so that it is still accessible to developers, but not end-users. To do this, right-click the *Retail Samples* domain and select *Hide*.

You can also unpublish the Retail Samples domain, which will make the folder private and visible only to the owner (administrator). To do this, right-click the *Retail Samples* domain and select *Unpublish*.



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WebFOCUS

Using the WebFOCUS Home Page
Release 8.2 Version 03



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