

# WebFOCUS

Using WebFOCUS Designer  
Release 8.2 Version 04

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## Navigating WebFOCUS Designer

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WebFOCUS Designer features a modern user interface with intuitive navigation, streamlined content creation, and the flexibility to build filtered responsive pages that are compatible with any browser or mobile device. This topic introduces WebFOCUS Designer and its features.

### In this chapter:

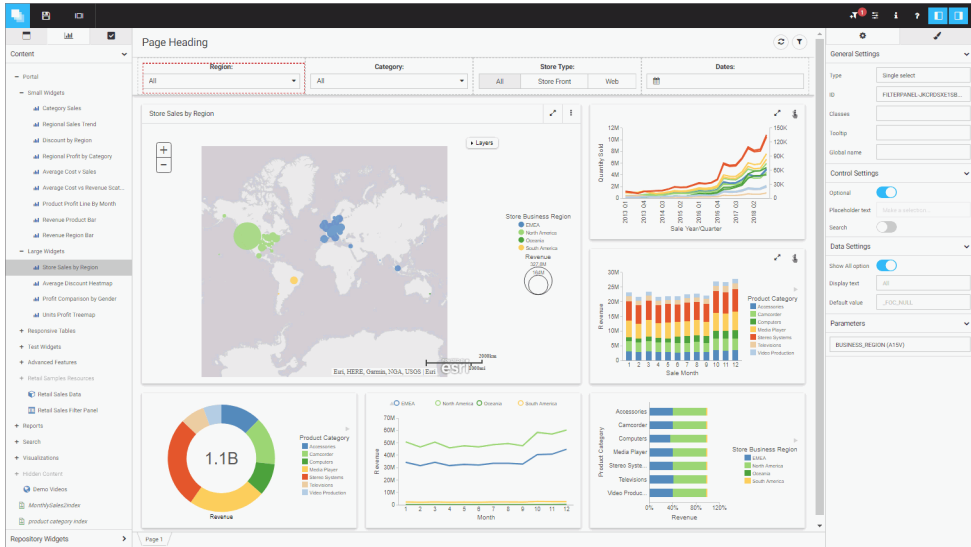
- [Introducing WebFOCUS Designer](#)
  - [Navigating the WebFOCUS Designer Interface](#)
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  - [Resource Selector](#)
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- 

### Introducing WebFOCUS Designer

WebFOCUS Designer is a web-based development tool that you can use to create interactive, responsive pages, using content that you or other members of your organization create. This content can be added to a page by utilizing drag-and-drop actions. With the interactive canvas, you can resize and rearrange resources with ease. Additionally, you can use the integrated filter control capability to create instant, compelling applications and InfoApps from your content.

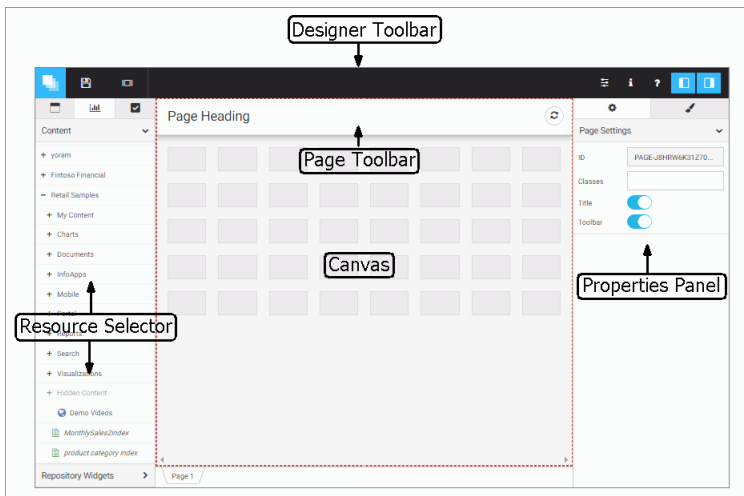
## Navigating the WebFOCUS Designer Interface

WebFOCUS Designer is shown in the following image.



## Navigating the WebFOCUS Designer Interface

The WebFOCUS Designer interface is shown in the following image.



WebFOCUS Designer consists of the following components:

- ☐ Designer toolbar







- Resource selector
- Canvas
- Page toolbar
- Properties panel




## Designer Toolbar

The Designer toolbar provides access to general properties and interface controls that you use to help develop content in WebFOCUS Designer, as shown in the following image.



The following table lists and describes the controls that you can access from the Designer toolbar.

Icon	Description
	<b>Application Menu.</b> Opens a menu that you can use to open an existing page, create a new page, save the current page, and close WebFOCUS Designer.
	<b>Save.</b> Opens the Save dialog box, where you can save the page to a specific location in your environment.
	<b>Preview.</b> Shows the page in preview mode, allowing you to view how the page will appear when run. To exit the preview mode of the Designer, click the back arrow.
	<b>Quick Filter.</b> Configures filters that automatically appear when new unbound parameters are found in the content on the page. The badge icon shows the number of parameters available.
	<b>Page Filter Configuration.</b> Opens the Page Filter Configuration dialog box, where you can choose to display filters in a filter bar above your content or in a modal window.
	<b>Info Mode.</b> Enables the informational mode that changes the view of all content items on the canvas to display their paths in the repository and parameters configured within these items.

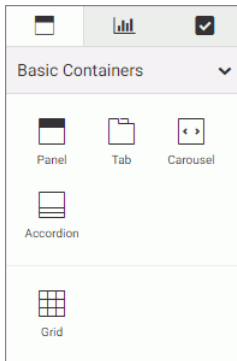
Icon	Description
	<b>Help.</b> Launches the online Help content.
	<b>Resources.</b> Hides or shows the Resource selector.
	<b>Properties.</b> Hides or shows the Properties panel.

## Resource Selector

You can use the Resource selector to access content, containers, and controls for your page. The Resource selector has the following tabs:

- Containers
- Content
- Controls

The Containers tab is shown in the following image.



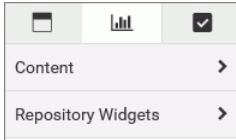
Using this tab, you can select empty containers, which you can drag to the canvas, and populate with the content of your choice. The types of containers available to you include the following:

- Panel
- Tabbed
- Carousel
- Accordion



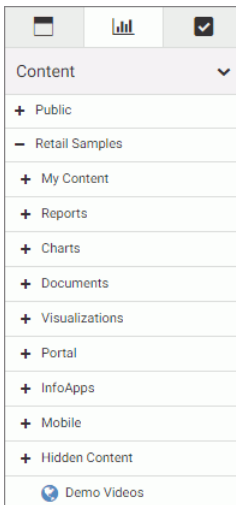
## Grid

The Content tab is shown in the following image.

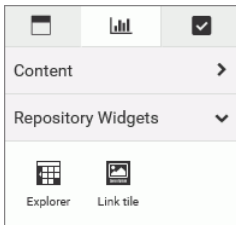


The Content tab consists of two drop-down areas, Content and Repository Widgets.

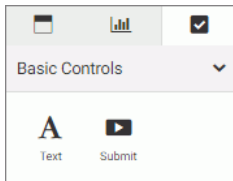
The Content area, shown in the following image, provides access to the Resources tree, where you can navigate to your content by expanding and collapsing folders, selecting content items, and dragging to the canvas.



The Repository Widgets area, shown in the following image, displays the Explorer and Link Tile widgets, which give you more ways to interact with your content.



The Controls tab is shown in the following image.



Using this tab, you can add a text label or a Submit button to your page.

## Canvas

The canvas is the design area. It provides a responsive grid for all your containers and content and resizes automatically to fit any browser or device. The canvas is shown in the following image.





When you right-click the grid area, you access a shortcut menu of options that include the following:

- Settings.** Opens Section Settings inside the Properties panel, which you can use to make the current section collapsible.
- Style.** Opens the Style tab of the Properties panel, which you can use to apply styles to the current section.
- Delete section.** Deletes the current section.

- ❑ **Insert section above.** Inserts a section above the current section.
- ❑ **Insert section below.** Inserts a section below the current section.

The Page toolbar is located above the canvas. Here you can edit the page title by double-clicking the text and typing the new text. You can hide the page title by disabling *Title* in the Properties panel.

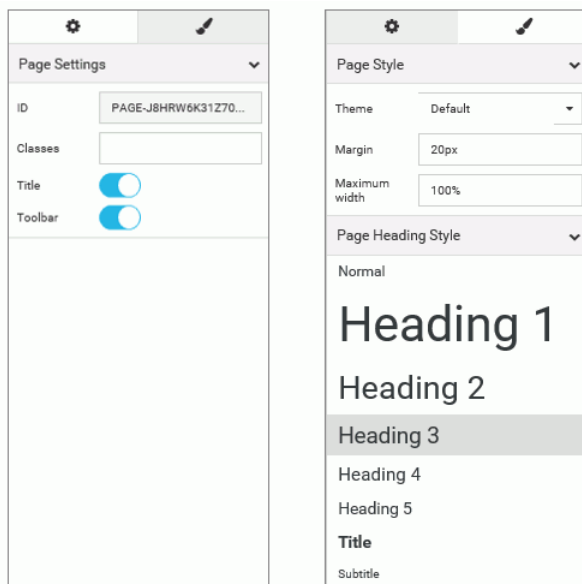
The Page toolbar also contains two options, described in the following table.

Icon	Description
	<b>Refresh.</b> Refreshes the content on the canvas.
	<b>Filter.</b> Toggles the page filter, which can be displayed as a filter bar or a filter modal window. This option is only visible when filters are added to the page.

You can hide the options by disabling *Toolbar* in the Properties panel. To hide the Page toolbar completely, disable both *Title* and *Toolbar* in the Properties panel.

## Properties Panel

You can use the Properties panel to configure properties for the element that you selected on the page. An example of the Properties panel for a page is shown in the following image. Under the Settings tab, you can toggle title and toolbar visibility. Under the Style tab, you can configure page style and page heading.



Using the responsive grid, drag-and-drop operations, and other features, arranging content on a page in WebFOCUS Designer is a quick and intuitive process. This topic describes how to create and customize a page in WebFOCUS Designer.

**In this chapter:**

- [Creating Pages in WebFOCUS Designer](#)
  - [Editing Pages in WebFOCUS Designer](#)
  - [Adding Content to a Page](#)
  - [Creating Multi-Content Containers](#)
  - [Resizing Content on a Page](#)
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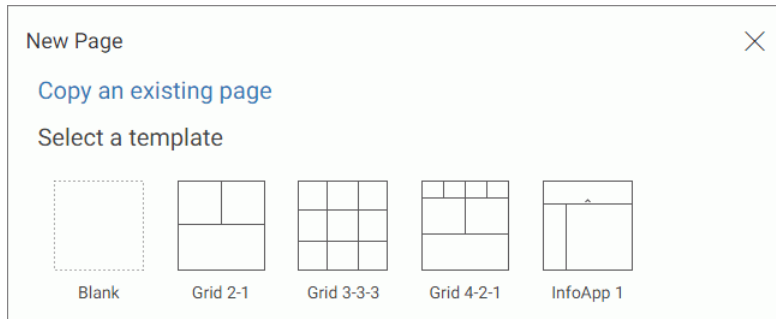
### Creating Pages in WebFOCUS Designer

You can create pages in WebFOCUS Designer that you can add to a portal or portal page to share with other users in your organization. Additionally, pages that you create in WebFOCUS Designer can be run as content items from the Home Page or directly from a browser. You can share a WebFOCUS Designer page as a stand-alone repository resource or a URL.

**Procedure:** **How to Create a Page Using WebFOCUS Designer**

1. Launch WebFOCUS Designer in one of the following ways:
  - From the WebFOCUS Home Page, in the Resources tree, select the domain or folder where you want to create the page, and then click *Page*.
  - From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want to create the page, point to *New*, and then click *Page*.

The New Page dialog box opens, as shown in the following image.



2. Select a template for your page. The options include *Blank*, *Grid 2-1*, *Grid 3-3-3*, *Grid 4-2-1*, and *InfoApp 1*.

WebFOCUS Designer opens, and the canvas shows the template that you selected.

## Editing Pages in WebFOCUS Designer

After creating a page in WebFOCUS Designer, you can edit it at any time, in one of the following ways:

- From the WebFOCUS Home Page, select the domain or folder where the page resides. Right-click the page, and click *Edit*.
- From WebFOCUS Designer, click the Application Menu button, and then click *Open*. In the Open dialog box, click the name of the page, and then click *Open*.
- From the Legacy Home Page, in the Resources tree, select the domain or folder where the page resides, right-click the page, and then click *Edit*.

**Note:** You can only use WebFOCUS Designer to edit pages that were created in this tool.

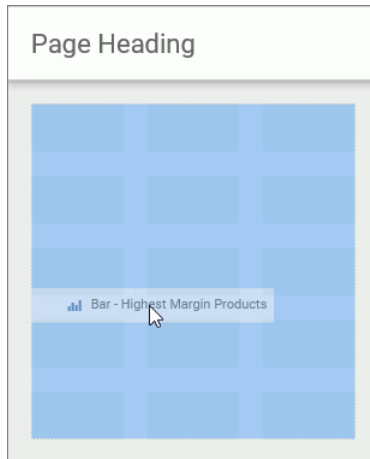
## Adding Content to a Page

In WebFOCUS Designer, you can create interactive pages or InfoApps, using content that you create in InfoAssist as well as images and URLs to external content. You can also add content to these pages using content that was created by another user in your organization. You can access the content that is available to you from the Content tab in the Resource Selector.

### **Procedure:** How to Add Content to a Page

1. From the Resources tree, in WebFOCUS Designer, drag a content item of your choice to the canvas, such as a chart.

As you drag the item to your canvas, a shaded placement area appears, as shown in the following image.



2. Repeat Step 1 to add more content to your page.

After adding content to your page, you can resize or rearrange items, add a heading, or add filters. Before closing the page, be sure to save any changes.

**Note:** When you add Insight-enabled content to a Designer page, it will run as a standard HTML5 chart. You can view the content in Insight mode by clicking the Explore with Insight icon. Content opens in a new browser tab.

## Creating Multi-Content Containers

In WebFOCUS Designer, you can create multi-content containers that show multiple content items at the same time. For example, you can create a carousel that rotates images or an accordion container that maximizes space on your page.

The multi-content container types include:

- Tab.** Displays content items using tabs that you can click to view secondary content items.
- Carousel.** Displays content as slides that rotate between other content items automatically.
- Accordion.** Displays content items in an accordion-styled container that you can expand or collapse to view different content items.

### **Procedure:** How to Create a Multi-Content Container

1. Add a content item to your page.

2. Drag a new content item to your page, and place it over the existing container.

The Add Content dialog box opens, and presents the following options.

- Replace content.** Replaces the content item with the new one.
- Add content as new tab.** Creates a tabbed container.
- Add content as new slide.** Converts the container to a carousel, and adds content as slides.
- Add content as new accordion area.** Creates an accordion container.
- Cancel.** Closes the Add Content dialog box.

3. Select an option to modify the container.

The item refreshes and shows the multi-content container. You can modify the container title and adjust the placement on your page.

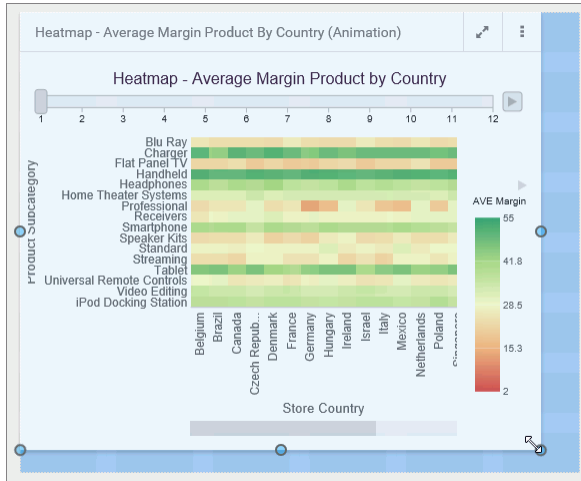
**Note:** Once you have selected a new tab, new slide, or new accordion area, the options in this menu only allow you to replace an item or add an item.

**Note:** You cannot edit accordion area titles by double-clicking them. When you double-click an area title, the area expands and collapses. To edit an accordion area title, right-click it and then click *Edit area title*.



## Resizing Content on a Page

You can resize content on a page, at any time, using the sizing handles and the shaded placement area that appear on the canvas. When you hover over an item on the canvas, a series of handles appear. Drag a handle in the direction that you want to resize the item, as shown in the following image.



## Hiding Content From Devices

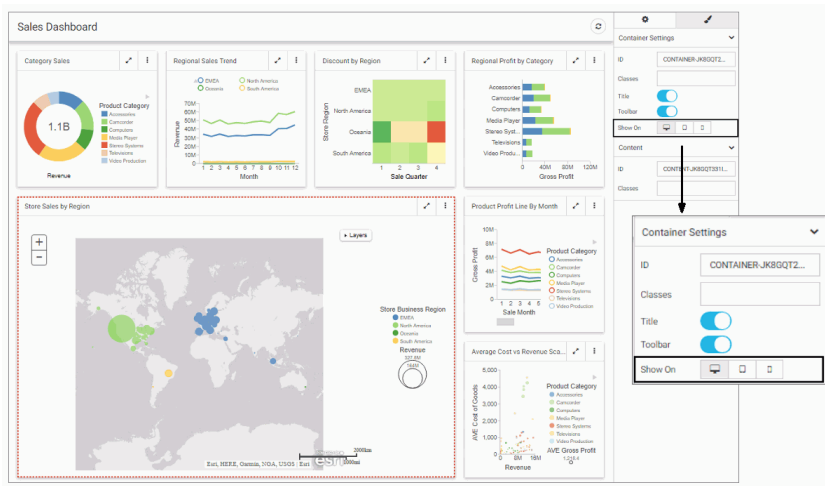
You can choose to hide certain content items from smaller devices, especially when dealing with large or multi-faceted items like maps or visualizations. When an item is hidden from a device, the other items around it re-flow into the empty space and retain the responsive layout.

### **Procedure:** How to Hide a Content Item From Devices

1. In WebFOCUS Designer, select a large item that you want to hide from small-screen devices.
2. In the Properties panel, in the Setting tab, under the Show On property, click the device icon to remove it from the list of devices on which this item will be shown.

**Note:** All three device buttons are selected, by default, making the item visible on all devices. Manually clear the buttons to hide the item from specific device types.

An example of hiding a large item from mobile phones and tablets is shown in the following image.




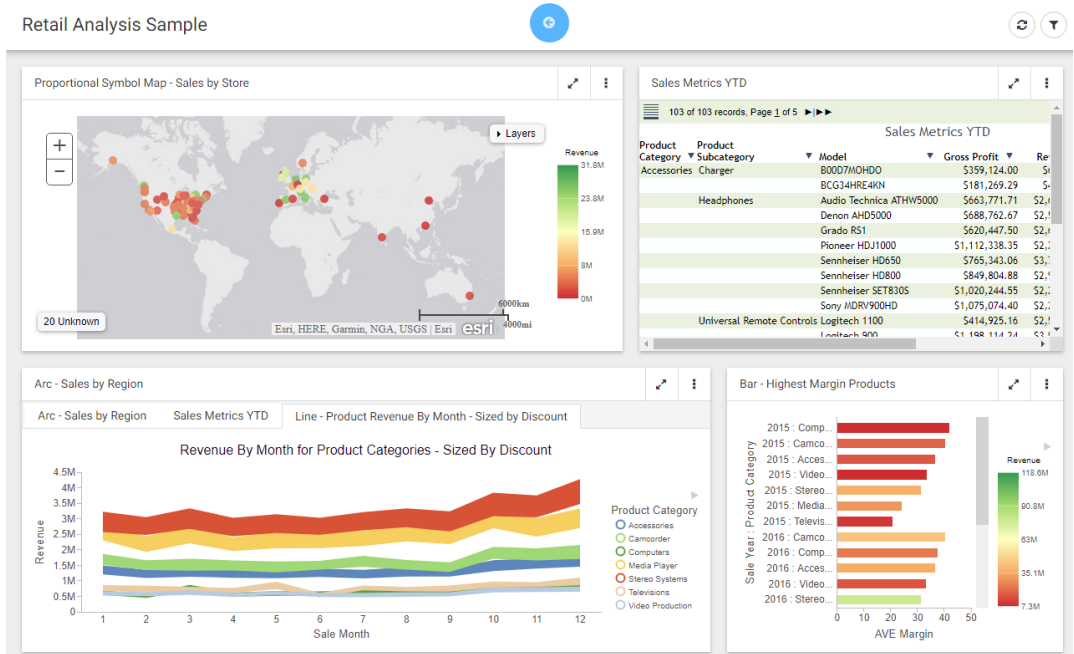
3. Save the page.
4. Run the page on a device, from which the item was hidden.


The item does not display. All remaining content items rearrange to cover the empty space, as shown in the following image.




## Previewing Pages

As you create pages in WebFOCUS Designer, you can preview how the page will appear when run by clicking the *Preview* button . This opens a preview mode of the Designer, which is shown in the following image.



In preview mode, you can interact with your content, view tooltips, as well as access menu options only available when the page is run. You can also explore the responsive capabilities of the page by adjusting the width of your browser. These functions are only available in the preview mode, as interactive features are disabled in design mode. The Maximize / Restore button  behaves in the same way when you create a page or preview a page, by maximizing the item to fill the entire canvas. If you save the page while an item is maximized, it will appear maximized the next time that you open or run the page, by default.

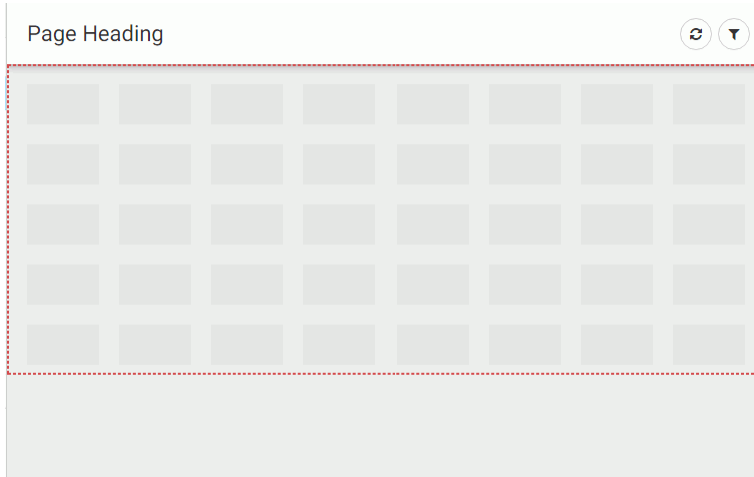
To exit the preview mode of the Designer, click the arrow .

## Dividing Pages into Sections

The WebFOCUS Designer canvas uses a responsive grid layout that you can divide into sections to organize your content, and achieve multiple, complex layouts. You can also collapse selected sections to allow users to maximize space on a page.

When you open a blank page, only one section displays inside the canvas. To add more sections, right-click the canvas and then click *Insert section above* or *Insert section below*.

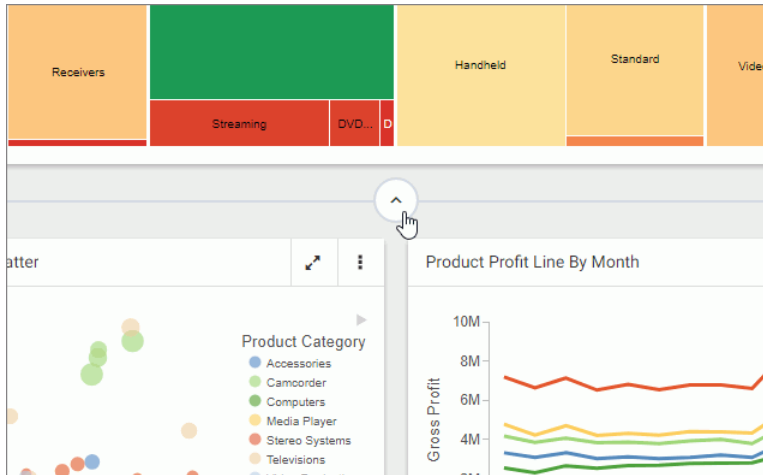
When a section is selected, a red dotted line appears to indicate the border of the section, as shown in the following image.



To delete a section, right-click the section, and then click *Delete section*.

To make a section collapsible, enable the *Collapsible* setting in the Properties panel. Right-click the section and click *Settings*, or click *Properties* on the toolbar to open the Properties panel. You must enable the *Collapsible* setting for each section that you want to make collapsible.

When the page is run, you can expand or collapse sections using the section indicator, which is shown in the following image.



When you save the page, the collapsed state of the section is saved and will appear collapsed the next time you open or run the page.

## Editing Page, Section, and Container Properties

The Properties panel displays the properties for the element that is selected. To access container properties, click a container or item with the Properties panel open. To access section properties, click the grid inside the canvas. To access page properties, click the page header or the toolbar. If the page header and the toolbar are hidden, you can access page properties by clicking the canvas outside a grid section.

The following properties are available for pages.

Settings tab:

- ID.** Contains a read-only unique CSS identifier that you can reference in custom JavaScript and CSS code.
- Classes.** Allows you to add one or more custom CSS classes that you can reference in custom JavaScript and CSS code.
- Title.** Toggles between hiding and showing the title in the header.
- Toolbar.** Toggles between hiding and showing the page toolbar.

Style tab:

**Theme.** Allows you to select a theme for the page. The options are Default, Light, and Midnight. Administrators can configure additional themes that will be available to users from this property.

**Margin.** Controls the size of the margin between the border of the page and the content.

**Note:** If the margin property is set to 0, you cannot select a section on the page or access the section shortcut menu options. As a workaround, change the margin property value to 20px temporarily to gain access to the section and its options.

**Maximum width.** Controls the maximum width of the page.

**Page Heading Style.** Provides a selection of typeface styles for the page heading.

The following properties are available for sections.

Settings tab:

**ID.** Contains a read-only unique CSS identifier that you can reference in custom JavaScript and CSS code.

**Classes.** Allows you to add one or more custom CSS classes that you can reference in custom JavaScript and CSS code.

**Collapsible.** Toggles between collapsible and noncollapsible modes of the selected section.

**Row height.** Sets the height of the section that is currently selected on the canvas. The default value is 60px.

**Note:** Changing the row height does not change the margin, which can be configured on the page level.

Style tab:

**Section Style.** Allows you to choose a style for the selected section.

The following properties are available for containers.

Settings tab:

**Container Settings.** Provides access to the following properties.

**ID.** Contains a read-only unique CSS identifier that you can reference in custom JavaScript and CSS code.

**Classes.** Allows you to add one or more custom CSS classes that you can reference in custom JavaScript and CSS code.

- Title.** Toggles between hiding and showing the title.
- Toolbar.** Toggles between hiding and showing the container toolbar.
- Show On.** Allows you to hide the selected container or item from displaying on specified devices. The options include desktop, tablet, and mobile.
- Content.** Provides access to the following properties.
  - ID.** Contains a read-only unique CSS identifier of the panel in which content runs. You can reference this ID in custom JavaScript and CSS code as well as drill-down targeting procedures.
  - Classes.** Allows you to add one or more custom CSS classes that you can reference in custom JavaScript and CSS code as well as drill-down targeting procedures.

Style tab:

- Container Style.** Allows you to choose a style for the selected container or item.

## Applying Themes And Styles to Pages


While customizing your page, you can apply themes and styles to various page elements. The general theme of the page is defined by the Theme setting, which you can configure in the Properties panel, on the page level. A theme affects the look of the entire set of elements on the page, including colors, opacity, and typeface styles. Themes also dictate the color scheme for the Styles setting, which you can configure in the Properties panel, on the section and container levels.

There are three themes that WebFOCUS Designer offers:

- Default
- Light
- Midnight

Once you select a theme, you can further modify it by configuring styles. You can also save your unique combination of a theme and styles as a custom theme.

### **Procedure:** How to Apply a Theme to a Page

1. In WebFOCUS Designer, click the *Page* toolbar to select it, and then click the *Properties* button .

The Properties panel opens.

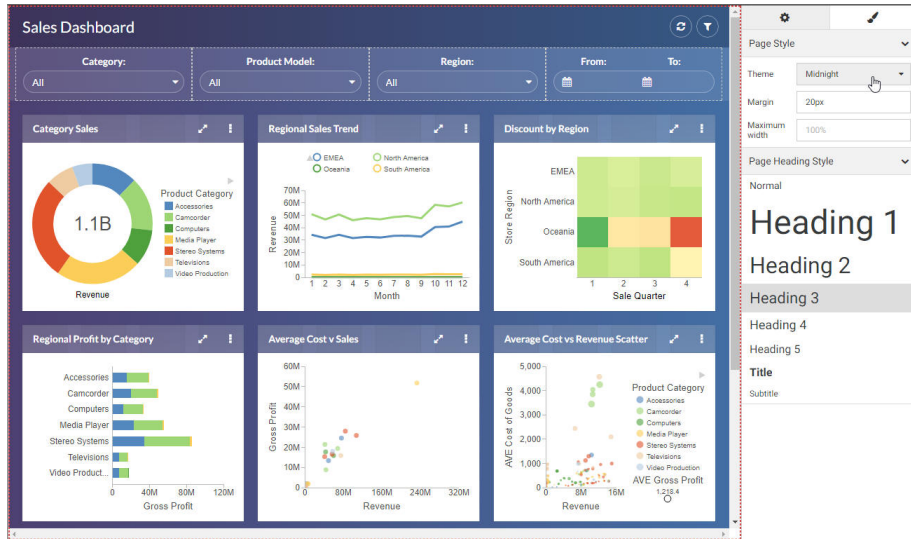


- Click the *Style* tab.

The style properties appear.


- Under the Page Style section, from the Theme property drop-down list, select the theme that you want to use.

The page refreshes with the new theme, as shown in the following image.

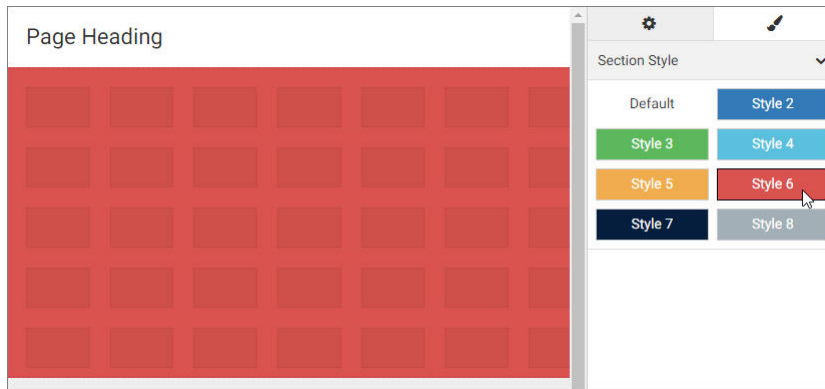


- Save your changes.

### **Procedure:** How to Apply Styles to Sections

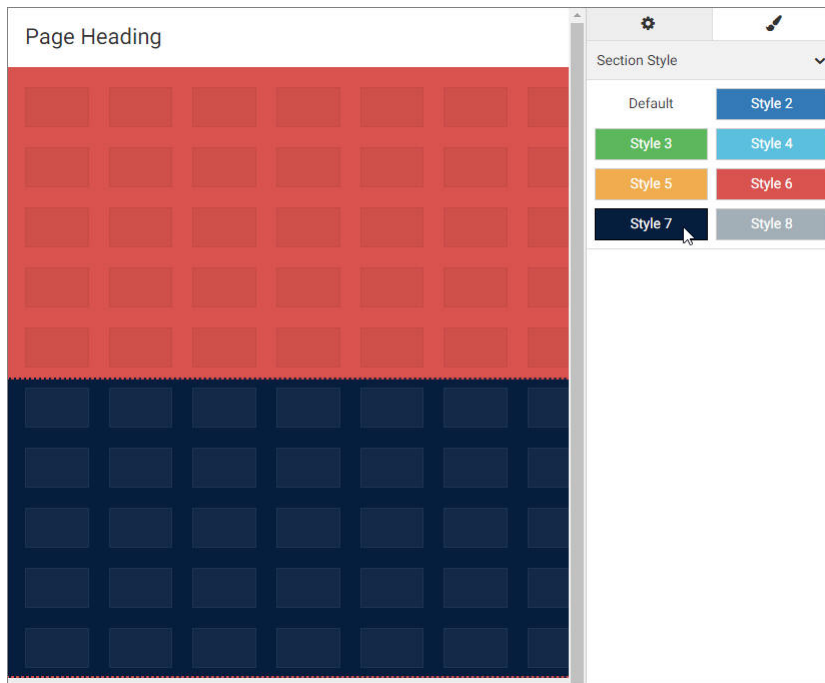
- In WebFOCUS Designer, click the canvas area.
- Click the *Properties* button  and then click the *Style* tab.  
The Style properties appear.
- Click a style that you want to use.

The page refreshes and applies the style to the section, as shown in the following image.




4. Optionally, add more sections and apply styles to them.
5. Click the new section and apply a style to it, as described in step 3.

The page refreshes and applies the new style. You can apply different styles to different sections, as shown in the following image.



6. Save your changes.

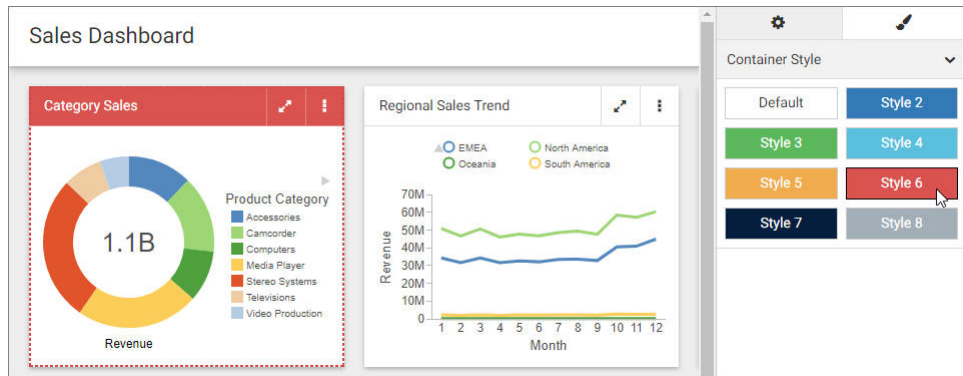
**Procedure: How to Apply Styles to Containers**

1. In WebFOCUS Designer, add content or containers to a page.
2. Click a container, click the *Properties* button , and then click the *Style* tab.

The Style properties appear.

3. Click a style that you want to use.

The page refreshes and applies the style to the container, as shown in the following image.



4. Optionally apply styles to other containers on the canvas.

**Note:** To apply the same style to multiple containers, you can multi-select containers by holding the Ctrl key, and then clicking a style button.

5. Save your changes.

**Procedure: How to Create a Custom Theme**

1. Sign in to WebFOCUS as an administrator.
2. On the Home Page, from the Resources tree, expand the *Global Resources* folder, and then expand the *Themes* folder.
3. Click the *Custom* folder, and then click *Folder* in the actions bar.

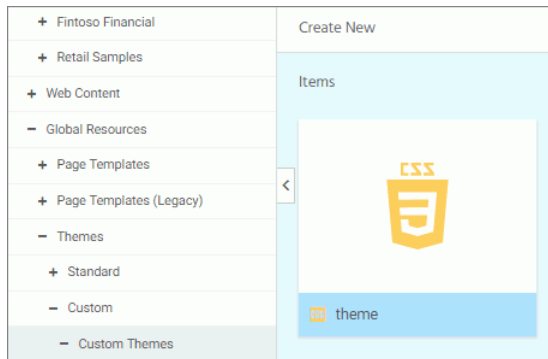
The New Folder dialog box opens.

4. Populate the Title field with the name of your custom theme, and click *OK*.

The custom theme folder is created. Your theme CSS file will reside in this folder. If you know which CSS classes should be used for your theme, you can create a new text file, add your code, and save this file as a *Cascading Style Sheet*. Alternatively, you can modify an existing theme CSS file. In this example, we copy and modify the theme CSS file for the Light theme.

5. Expand the *Standard* folder, and then expand the *Light* folder.
6. Copy the theme CSS file, and paste it inside your new custom theme folder.

The following image shows the correct hierarchy of the custom theme file.



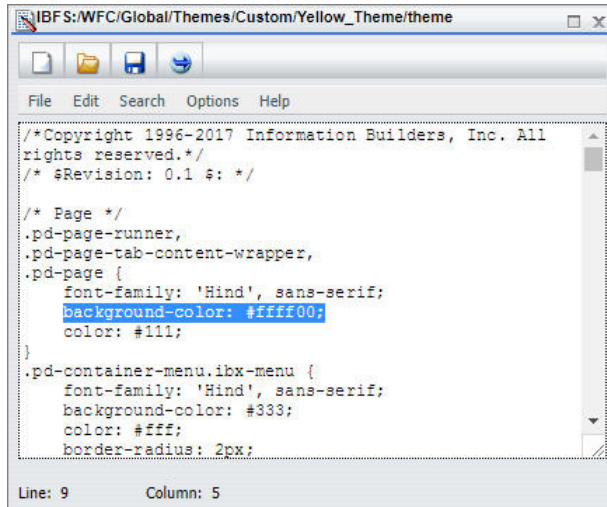
**Note:** Do not modify the name of the theme CSS file. It is imperative that it stays the same for all themes. The name of the folder in which the file resides, is the theme name that is available in WebFOCUS Designer.

7. Right-click the newly copied theme CSS file, and then click *Edit*.

The Text Editor window opens.

8. Modify the code to achieve the desired look of the theme.

In this example, the background color has been changed from white #fff to yellow #ffff00, as shown in the following image.

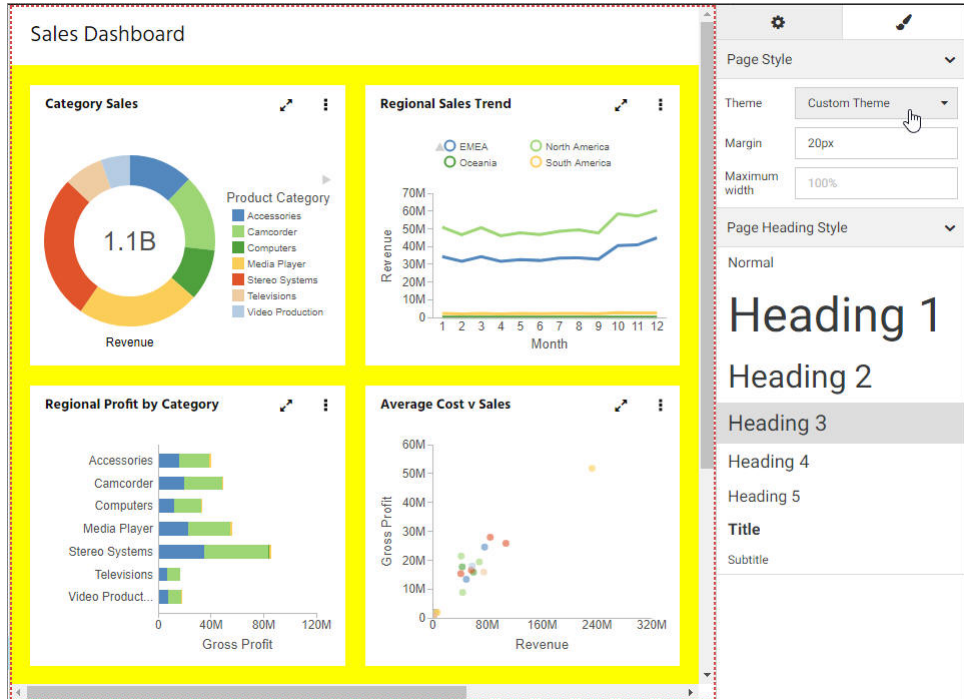


```
IBFS:WFC/Global/Themes/Custom/Yellow_Theme/theme
File Edit Search Options Help
/*Copyright 1996-2017 Information Builders, Inc. All
rights reserved.*/
/* $Revision: 0.1 $: */

/* Page */
.pd-page-runner,
.pd-page-tab-content-wrapper,
.pd-page {
  font-family: 'Hind', sans-serif;
  background-color: #ffff00;
  color: #111;
}
.pd-container-menu.ibx-menu {
  font-family: 'Hind', sans-serif;
  background-color: #333;
  color: #fff;
  border-radius: 2px;
}
Line: 9 Column: 5
```

9. Save and close the Text Editor.
10. In WebFOCUS Designer, apply the new custom theme to a page, as described in [How to Apply a Theme to a Page](#) on page 24.

An example of a new theme applied to a page, as shown in the following image.



11. Save your changes.

## Creating Custom Templates

Aside from the default templates that WebFOCUS Designer offers, you can create custom templates that reflect your unique layout. They are a great way to add structural variation or highly customized layouts to your page. Custom templates are also useful for organizations that have a set style for all of their pages. You must have administrator access to WebFOCUS to deploy custom templates.

### **Procedure:** How to Create a Custom Template for WebFOCUS Designer Pages

1. Sign in to WebFOCUS as an administrator.
2. On the Home Page, from the actions bar, click *Page*.

WebFOCUS Designer opens.

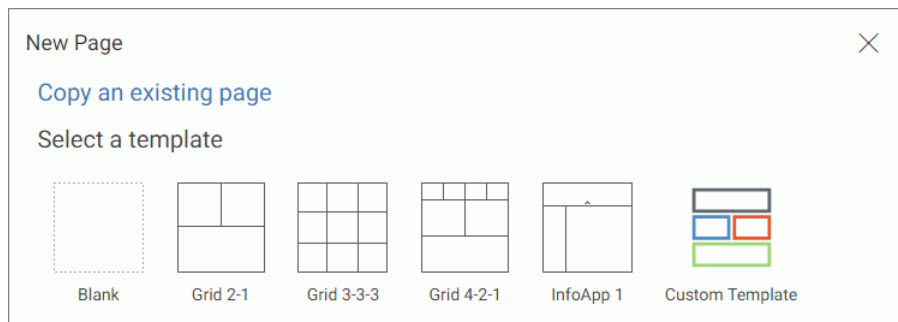
3. Select one of the default templates that you want to use as the starting point for your custom template.

4. Modify the page layout to reflect your preferences. For example, insert new sections or customize the sizing of each row in the template.
5. Save your new page to any folder and exit WebFOCUS Designer.
6. Optionally, apply a custom thumbnail your template page, as described in the *Adding Thumbnails to Content Items* topic in the *WebFOCUS Home Page* Technical Library. If you do not assign a custom thumbnail, the default thumbnail WebFOCUS associates with pages will display, instead.
7. On the Home Page, expand the *Global Resources* folder, and then expand the *Page Templates* folder.

Two folders display inside the Page Templates folder: Standard and Custom.

8. Copy your new template page from its initial directory and paste it inside the *Custom* folder.

The next time you launch WebFOCUS Designer, your custom template appears, as shown in the following image.



Once a custom template is created, you can configure access to it by using security rules to hide it from specific groups of users. To learn more about working with security rules, see *WebFOCUS Security and Administration* manual. You can also translate the title of the custom template page and any strings inside the page, as described in *Localizing Designer Pages* on page 39.

## Using Repository Widgets

The repository widgets provide additional innovative ways of using your content and incorporating it into your page. There are two repository widgets currently available in WebFOCUS Designer.

- Explorer.** Allows you to put the WebFOCUS Explorer onto your page and use the WebFOCUS Home Page features to navigate your content. A page that displays the Explorer widget can replace the default Workbench page in the Business Intelligence Portal.

- ❑ **Link tile.** Layers content in such a way that one content item becomes a click-through tile that opens another content item. This feature is especially useful when you need to incorporate a large or Insight-enabled item into a page and display it on all devices.

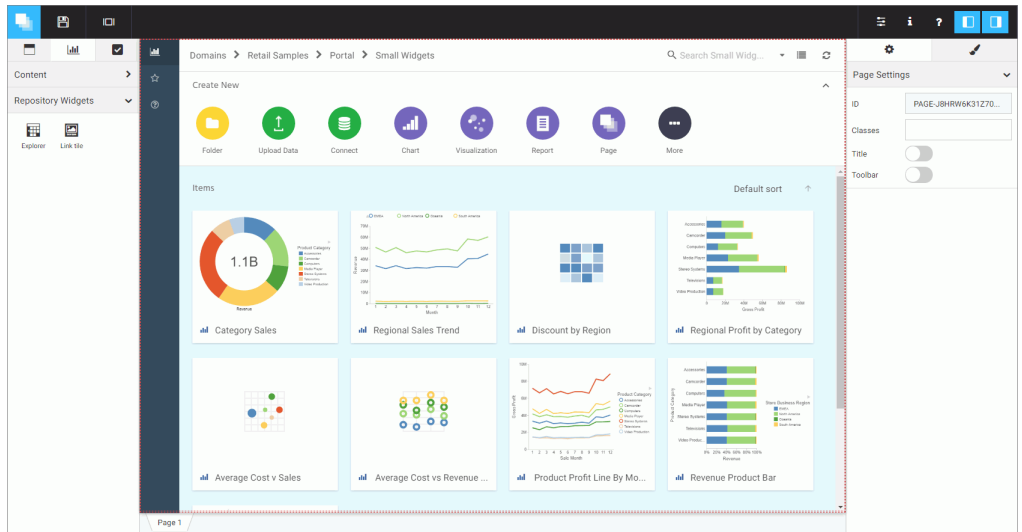
**Procedure: How to Use the Explorer Widget**

1. Open WebFOCUS Designer and select the Blank template.
2. From the Content tab of the Resource Selector, from the Repository Widgets area, drag the *Explorer* widget onto the canvas.

The widget displays on the page and incorporates the full view of the WebFOCUS Explorer.

3. Maximize your widget container to fill your page.
4. Optimize the look of the page by removing the page and container titles and toolbars.
  - a. Select the widget container on the canvas, open the Properties panel, and then disable the Title and Toolbar options.
  - b. Select the page and disable the Title and Toolbar options in the Properties panel.

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



5. Save your page.

The page can now be added to a portal as described in [How to Add a Designer Page to a Portal](#) on page 44 or used as a standalone item.



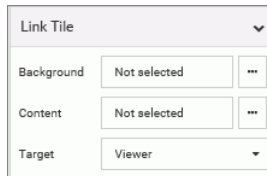
**Procedure: How to Use the Link Tile Widget**

1. From the Content tab of the Resource Selector, from the Repository Widgets area, drag the *Link tile* widget onto the canvas.

The widget displays as an empty placeholder on the page.

2. With the Link tile placeholder selected, open the Properties panel.

The Link Tile properties display, as shown in the following image.



3. Click the ellipses icon next to the Background option and navigate to the content item that you choose to display on the page.

**Note:** Pick an image or a content item that you want users to see when the page loads. Note that any interactive features in the content are disabled when it displays in the Link Tile background.

4. Click the ellipses icon next to the Content option and select the target item. This content will run when users click on the Link Tile panel.
5. Determine how the target item will display by setting the Target option to *Viewer* or *New Window*.
6. Evaluate the behavior of the click-through action in the Preview mode.
7. Exit the Preview mode and save your page.

**Using a JavaScript Function to Drill to a Panel**

You can use a JavaScript function to dynamically navigate to panels within a Designer page and pass parameters from content in one panel to the content in other panels. This makes it possible to create an interactive page where the user can explore the data in different ways.

To create the Navigate to Panel function, you need to perform the following steps:

1. **Create Hyperlinks.** Create hyperlinks within a chart or report, which you will later configure to point to parameterized content.
2. **Create Parameterized Content.** Create charts and reports to which the links will point.
3. **Determine the CSS Class for the Target Content Panel.** Inspect the target content item inside the Designer page and determine its CSS class.

4. **Configure Hyperlinks with the CSS Class.** Specify the output location for the links.

**Note:** The entire example of the content and the page that we create in this section can be found in your Retail Samples domain, in the Portal folder, under Advanced Features.

## 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*. In this example we are using *wf\_retail\_lite*.
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 Panel function to highlight it.
6. On the *Field* tab, in the *Links* group, click *Drill Down*.

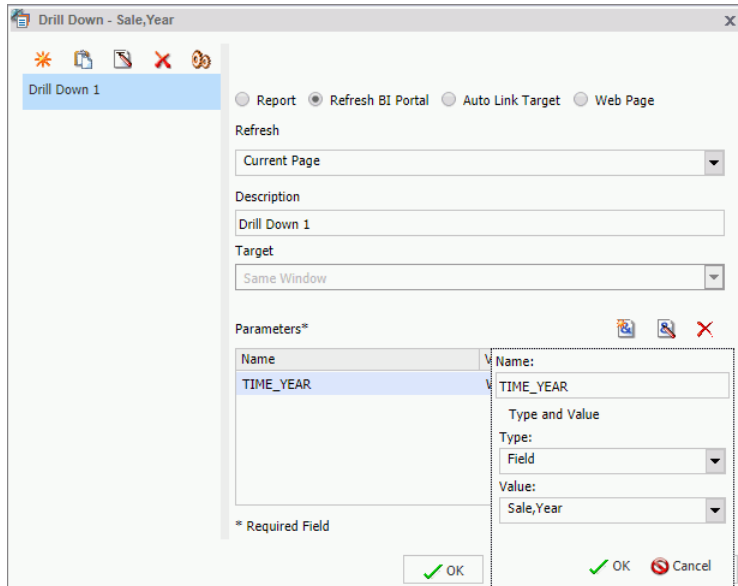
The Drill Down dialog box opens.

7. Select the *Refresh BI Portal* radio button.
8. Click the *Add Parameter* button.
9. Type a name for the parameter.

**Note:** Remember the name of the parameter. You will use it in the subsequent steps.

10. In the Type list, click *Field*.
11. 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 *TIME\_YEAR* is the name of the parameter.



12. 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.

13. Follow the steps 5-12 to create more hyperlinks, if needed.
14. Save the report.

## Step Two: Creating Parameterized Content

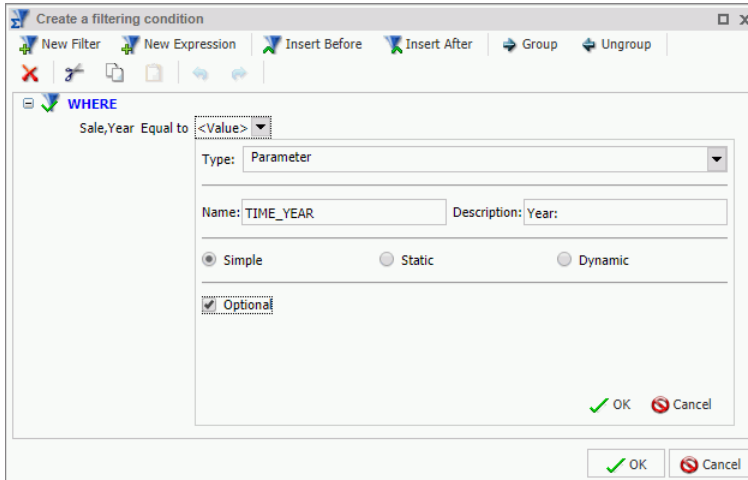
In this step, you build parameterized reports and charts that will serve as the target content for the parameters coming from your JavaScript function..

### **Procedure:** How to Create Parameterized Content for Hyperlinks

1. From InfoAssist, click the application button, then click *New*.
2. Click *Build a Report* or *Build a Chart*.
3. Select the same data source file that you used for the initial report, and then click *OK*.
4. Drag fields from the Data pane onto the canvas or into the Query pane to create a report or chart.

5. On the *Data* tab, in the *Filter* group, click *Filter*.  
The Create a filtering condition dialog box opens.
6. Double-click the *Double-click or press F2 to edit!* text.
7. 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 *TIME\_YEAR* is the name of the parameter.



8. Click *OK*.
9. Save the second report and close WebFOCUS InfoAssist.
10. Repeat steps 1-8 to create more content.
11. Close WebFOCUS InfoAssist.

## Determine the CSS class for the Target Content Item

In this step, you create a Designer Page, inspect the target content item inside the page and determine the CSS class for this item.

**Procedure: How to Determine CSS Class for a Content Item**

1. Open a web browser.
2. Launch WebFOCUS Designer, as described in *Creating Pages in WebFOCUS Designer* on page 13.
3. Add the parameterized content item to the page.
4. With the content item selected on the canvas, open the Properties panel.
5. Copy the unique CSS identifier in the Content ID field to the clip editor.

**Note:** Alternatively, you can populate the Classes field under the Content section to assign a custom CSS class to this content item. You can assign the same CSS class to two or more content items and apply a JavaScript function to all of them simultaneously.

The following images shows an example of CSS Classes, a default one in the ID field and the custom one in the Classes field.

Content ▼	
ID	CONTENT-JBZUI1RV13...
Classes	YearDetailPanel

6. Optionally, repeat steps 3-5 for other content items that you want to refresh.

**Configure Hyperlinks with the CSS Class**

In this step, you edit the report containing hyperlinks to specify the output location and test the Navigate to Panel function.

**Procedure: How to Configure Hyperlinks**

1. On the Home Page, open the initial report in the Text Editor.
2. Navigate to the line that contains the following code:  
`JAVASCRIPT=drillRefresh`
3. Change `drillRefresh` to `portalDispatch`, place `drillRefresh` after the parenthesis, change `AMPERS_PAGE_ONLY` to `self`, and paste the CSS class that you copied from the web browser debugger interface. Ensure that you enclose these entries in single quotation marks.

An example of modified syntax should look similar to this:

```
JAVASCRIPT=portalDispatch('drillRefresh' 'self' 'CONTENT-
JBZUI1RV13DHPPP9A778' 'TIME_YEAR'
WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR)
```

where:

*portalDispatch*

Is the JavaScript function.

*self*

Is an indication that the current page will be refreshed.

*CONTENT-JBZUI1RV13DHPPP9A778*

Is the CSS class that you copied from the web browser debugger interface.

If you want to refresh two or more items on the page, paste their CSS classes separated by spaces and enclose them all in single quotation marks, like so:

```
'CONTENT-JFJUGXYX1LHV08Z5T210 CONTENT-JFJUJUDL12XKUUHTX291'
```

Alternatively, you can paste the single custom CSS class that you assigned in the Classes field in the Properties panel.

*TIME\_YEAR*

Is the name of the parameter that is being passed from the hyperlinks.

*WF\_RETAIL\_LITE.WF\_RETAIL\_TIME\_SALES.TIME\_YEAR*

Is the database entry which is tied to the parameter alias.

The following image shows an example of the modified syntax for a single parameter using the unique CSS class assigned by WebFOCUS Designer.

```
TYPE=ACROSSVALUE, ACROSS=N1, ALT='Drill Down 1', TARGET=' self',  
JAVASCRIPT=portalDispatch('drillRefresh' 'self' 'CONTENT-JBZUI1RV13DHPPP9A778'  
'TIME_YEAR' WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR), $
```

The following image shows an example of the modified syntax for a single parameter using the custom CSS class that you assigned in the Classes field.

```
TYPE=ACROSSVALUE, ACROSS=N1, ALT='Drill Down 1', TARGET=' self',  
JAVASCRIPT=portalDispatch('drillRefresh' 'self' 'YearDetailPanel' 'TIME_YEAR'  
WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR), $
```

When working with more complex content items, such as matrix charts or reports, you might want to pass more than one parameter to your target content. An example of syntax for passing two parameters using unique CSS classes assigned by WebFOCUS Designer is shown in the following image.

```
TYPE=DATA, ACROSSCOLUMN=N1, ALT='Drill Down 2', TARGET=' self',  
JAVASCRIPT=portalDispatch('drillRefresh' 'self' 'CONTENT-JBZUI4AQ1N27795PD5533'  
'TIME_YEAR' WF_RETAIL_LITE.WF_RETAIL_TIME_SALES.TIME_YEAR 'BUSINESS_REGION'  
WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_CUSTOMER.BUSINESS_REGION), $
```

The following image shows an example of syntax for passing two parameters using the custom class that you assigned in the Classes field.

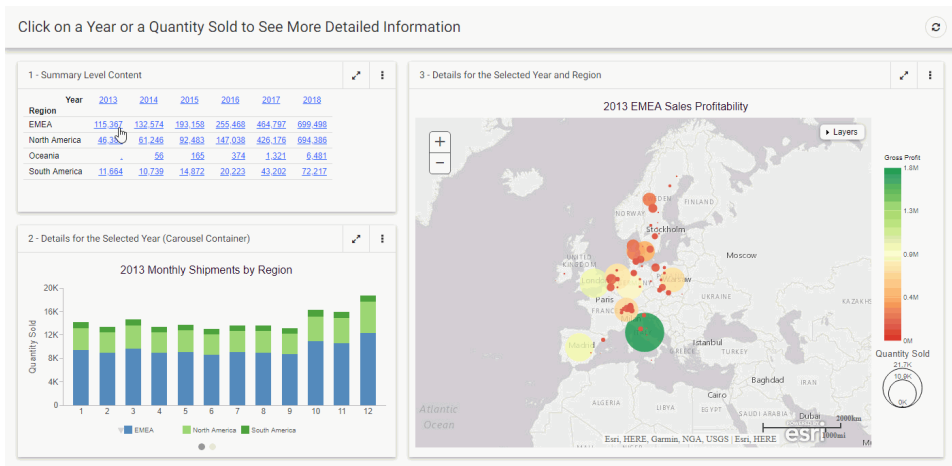
```
TYPE=DATA, ACROSSCOLUMN=N1, ALT='Drill Down 2', TARGET='self',
JAVASCRIPT=portalDispatch('drillRefresh' 'self' 'QtySoldDetailPanel' 'TIME_YEAR'
WF RETAIL LITE.WF RETAIL TIME SALES.TIME YEAR 'BUSINESS REGION'
WF RETAIL LITE.WF RETAIL GEOGRAPHY CUSTOMER.BUSINESS REGION), $
```

4. Click Save and close the Text Editor.
5. In WebFOCUS Designer, add the report that you just modified to the canvas.
6. Click the *Preview* button.

The preview mode opens.

7. Click any link in the initial report.

Your content refreshes to reflect the correct data, as shown in the following image.



## Localizing Designer Pages

You can translate pages created in WebFOCUS Designer to reflect a specific language preference. This localization includes text strings shown in the page heading, container titles and control labels.

When working with Western European languages you may leave the WebFOCUS client code page and your application server JVM file encoding set to their default values of 1252/Cp1252. If you plan to support double-byte languages, such as Japanese or Chinese, you must use Unicode/UTF-8 for the WebFOCUS code page and UTF8 for the JVM file encoding.

**Note:** Contact customer support for assistance with translating Designer pages if any of the following apply to you:

- You are changing the WebFOCUS code page or JVM file encoding settings in an environment that is already being used in production. This may result in certain repository data being misread by WebFOCUS.
- You need to allow non-Administrators to import page translation property files. This can be accomplished with custom security rules.
- You are downloading translation property files for a page that has special characters in its IBFS path, such as in its name or in the names of any of its parent folders. WebFOCUS creates the download zip file correctly and Winzip expands the zip correctly, but Winzip does not properly zip the edited files back up correctly because of the special characters in the folder path. As a workaround you can use a zip program that supports UTF8 folder name encoding or you can move the unzipped translation folder structure to the WebFOCUS82\cm\import folder.

### **Procedure:** How to Translate a Designer Page

1. In the Administration Console, enable the Dynamic Language Switch and choose the languages you plan to support.

**Note:** This step must be performed by a WebFOCUS Administrator.

2. Create a new WebFOCUS Designer page, or locate the existing WebFOCUS Designer page that you want to customize.
3. On the Home Page, right-click your Designer page, and then click *Download translations*.

The archive file, which includes translation property files for each of the languages configured on your WebFOCUS environment, downloads to your machine.

4. Unzip the archive file in your preferred directory.
5. Expand the *root\_content*, *WFC*, *Repository*, and other folders until you reach the folder that matches the name of your page.

The properties files for each language that you enabled in the Dynamic Language Switch setting are available in the folder for your page.

6. Open the language property file that you want to modify in a text editing tool that supports editing of UTF-8 encoded files, such as Notepad++.
7. Supply a translation for all your custom elements.



An example of the translated terms is highlighted in the following image.

```

1 #Exported on: 1510595075904
2 #Mon Nov 13 12:44:35 EST 2017
3 PAGE_HEADING=Tablero de Ventas
4 PANE_TITLE_3=Tienda de Ventas Por Región
5 FC_PLACEHOLDER_1=Seleccione una categoria
6 PANE_TITLE_2=Costo Promedio vs Ingresos
7 CONT_TITLE_3=Costo Promedio vs Ingresos
8 FC_LABEL_1=Categoría de Producto\:
9 PANE_TITLE_1=Categoría Ventas
10 CONT_TITLE_2=Costo Promedio vs Ingresos
11 CONT_TITLE_1=Categoría Ventas
12 FC_TOOLTIP_2=Especifique el periodo de tiempo
13 FC_TOOLTIP_1=Especifique el periodo de tiempo

```

**Note:** WebFOCUS will escape certain special characters with a backslash (\), including the colon (:), the equal sign (=), and the backslash. Leave these escape characters in place if you encounter them in the property files.

8. Save your changes and close the text editing tool.
9. Create a new zip archive for the edited property files.

It is important to preserve the folder structure of the property files as well as the other files originally included in the zip file.

Steps 2-9 can be performed by any user who has the WebFOCUS Designer privilege.

10. Upload and import the new translation zip archive using WebFOCUS Change Management.

**Note:** You must select *Add New and Update Existing Resources* in the Import Package dialog box to ensure that the property files are saved.

To learn more about WebFOCUS Change Management, see the *WebFOCUS Security and Administration* manual.

The strings inside the page are now localized.

**Note:** This step must be performed by a WebFOCUS Administrator or a user who has been granted appropriate security privileges.

11. To localize the page title displayed on the Home Page, right-click your page on the Home Page, and then click *Properties*.

The Properties panel opens.

12. Next to the Language property, click *View All*.

The Language Properties dialog box opens.

13. Populate the Title field for your new language with the localized title.

The following image shows an example of the customized language preferences.



14. Click *OK*, and then click *Save* on the Properties panel.

The page title is now localized.

15. In the banner menu, click *Preferences*.

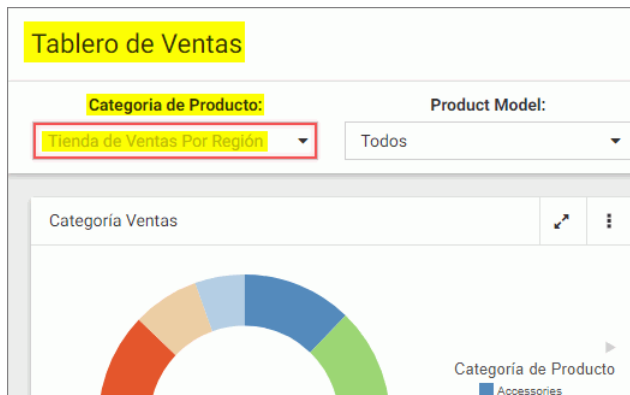
The My Preferences dialog box opens.

16. Change Language to the one for which you performed your translation, and click *OK*.

The Home Page reloads using the new language.

17. Right-click your page, and then click *Run*, or the equivalent of this option in your new language.

The page runs and displays your localized custom elements, as shown in the following image.



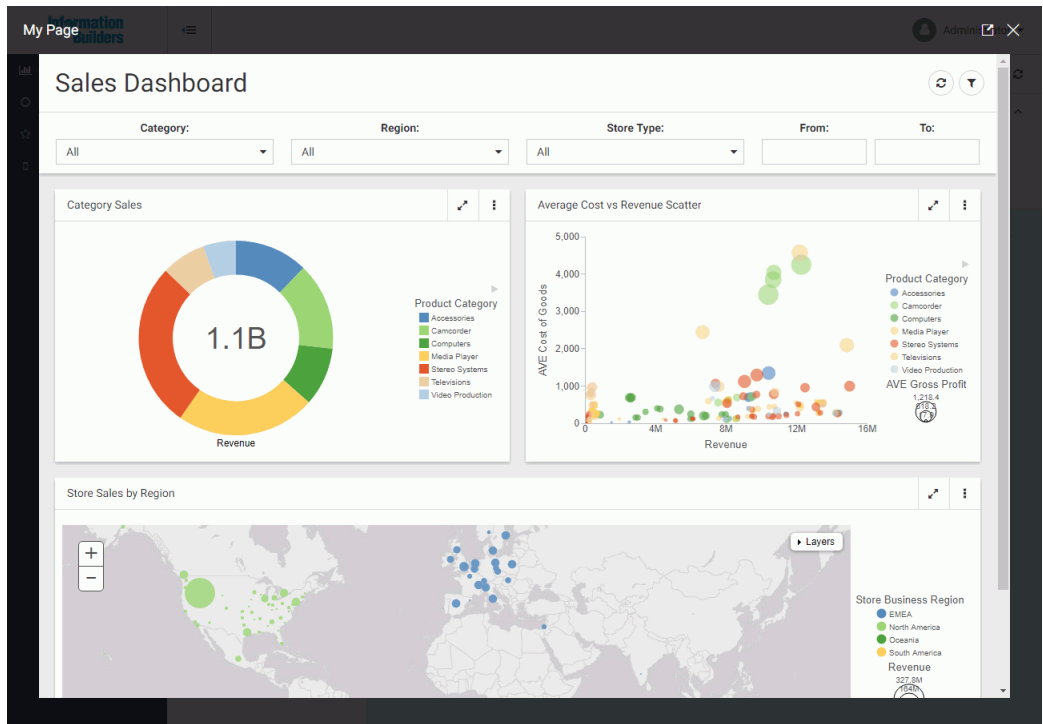
## Using WebFOCUS Designer Pages

Pages that you create in WebFOCUS Designer can be used standalone, in a portal, and embedded in a third-party or customer-facing application. The sections below explain some of the most common ways to run and use WebFOCUS Designer pages.

### **Procedure:** How to Run a Designer Page from the Home Page

1. Create a new WebFOCUS Designer page and save it in a directory of your choice.
2. On the Home Page, right-click your new page, and then click *Run*.


The page opens in the Home Page viewer within the same browser window, as shown in the following image.



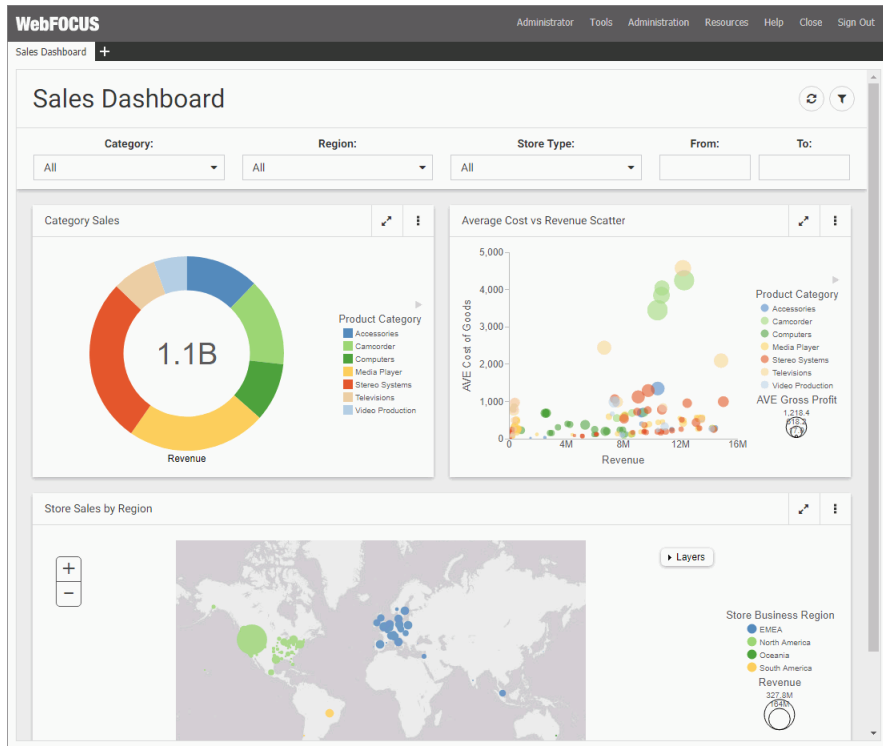
Here you can interact with the content, change filter values, minimize or expand items, collapse or expand the filter panel, collapse or expand sections, refresh your content, and open this page in a new browser window or tab.

3. Close the page by clicking the close button in the upper-right corner.

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

1. Create a new WebFOCUS Designer page, and save it in a directory of your choice.
2. On the Home Page, on the actions bar, click *Collaborative Portal*  .  
The New Portal dialog box opens.
3. Populate the Title field and click *Create*.  
The Portal Designer opens in the new window or tab, depending on your browser settings.
4. Keep the 1 Column page template selected. Optionally, populate the Title field, and click *Create*.
5. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.
6. Drag your new WebFOCUS Designer page to the canvas, in the same way you would drag any other content item.
7. In the Properties panel, set Height to *Auto*.
8. In the Properties panel, in the Title tab, select the *Hide Title Bar* check box.
9. Save your changes and close the Portal Designer.
10. On the Home Page, right-click the new portal and then click *Run*.

The portal runs in the new window or tab, and displays your new Designer page, as shown in the following image.



**Procedure: How to View a Designer Page in the Mobile Viewer**

1. Create a new WebFOCUS Designer page, and save it in a directory of your choice.
2. In a desktop browser or on a mobile device, type the following address:

[http://server:port/ibi\\_apps/mv/Path\\_to\\_Designated\\_Page](http://server:port/ibi_apps/mv/Path_to_Designated_Page)

where:

*server*

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

*port*

Is the port number on which the server is listening.

*Path\_to\_Designated\_Page*

Is the path to the folder containing the content that you want to view in the Mobile Viewer.

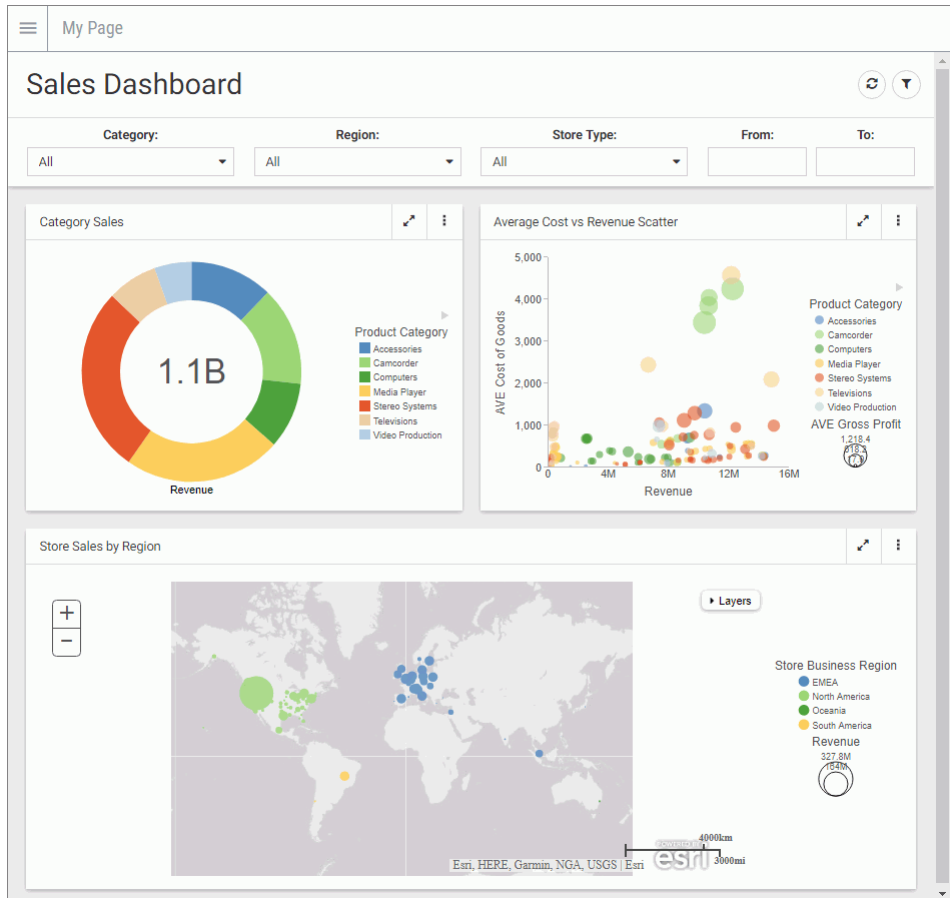
**Note:** If the content resides in a My Content folder, then the path should include a domain name and a username preceded by the tilde character, as follows:

[http://server:port/ibi\\_apps/mv/Domain\\_Name/~username](http://server:port/ibi_apps/mv/Domain_Name/~username)

The Mobile Viewer page opens.

3. Open the *Content* menu in the upper-left corner, and click the name of your Designer page.

The Designer Page opens in the Mobile Viewer, as shown in the following image.



**Procedure: How to Run a Designer Page From a URL**

1. Create a new WebFOCUS Designer page and save it in a directory of your choice.
2. On the Home Page, right-click your new Designer page and then click *Properties*.  
The Properties panel open.
3. On the General tab, in the Path property, copy the portion of the path that appears after the word *Repository*.
4. In a new browser window or tab, type the following path:

```
http://server:port/ibi_apps/run/ibfs/WFC/Repository/  
Path_to_Designated_Page
```

where:

*server*

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

*port*

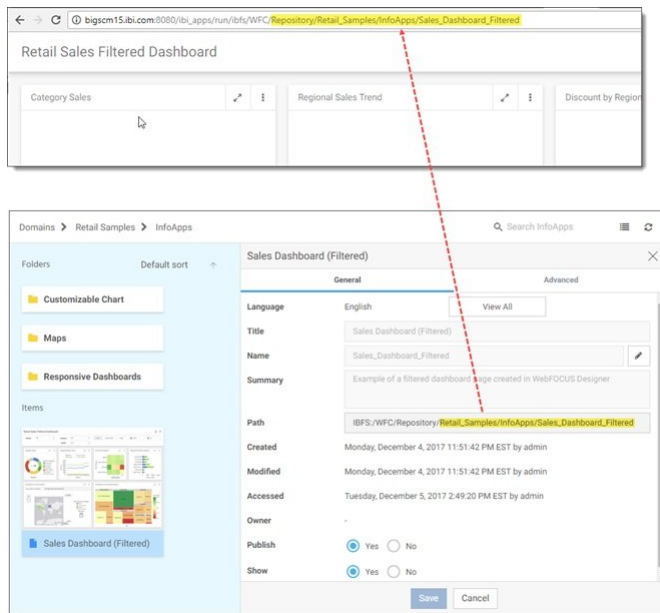
Is the port number on which the server is listening.

*Path\_to\_Designated\_Page*

Is the portion of the path that you copied from the Path property.

5. Press *Enter*.

The page runs from the URL that you created, as shown in the following image.

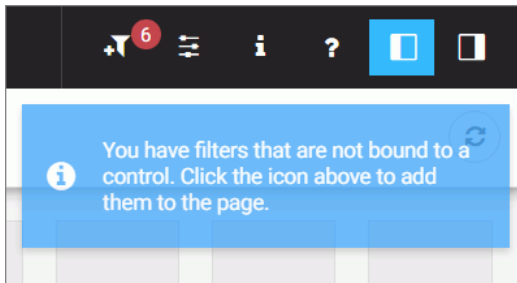




# Chapter 3

## Working With Filters in WebFOCUS Designer

Creating a page filter in WebFOCUS Designer is a quick and intuitive process. Whenever you add parameterized content item to the canvas, such as a report with parameters or chart with parameters, Designer recognizes the parameters and creates filters for them automatically. The tool then notifies you of any available filters with a notification, and a badge count is overlaid on the Quick Filter button, as shown in the following image.



After you add filters to a page, you can edit filter parameters, customize your filter grid, and change the types of your filter controls.

### In this chapter:

- [Adding Filters to a Page](#)
- [Configuring Filter Control and Filter Grid Properties](#)
- [Using Filters in WebFOCUS Designer](#)

### Adding Filters to a Page

There are three ways to add filters to a page in WebFOCUS Designer:

- Automatically, by clicking the *Quick Filter* button.
- Manually, by creating an empty filter bar or filter modal window and populating it with select filters.
- Manually, inside a Grid container.

**Procedure: How to Automatically Add Filters to a Page Using the Quick Filter Button**

1. In the Resource selector, drag a parameterized item of your choice from the Resources tree to the canvas.

The Quick Filter button appears on the toolbar with the badge icon showing the number of unbound filters.

2. Optionally, add more content.

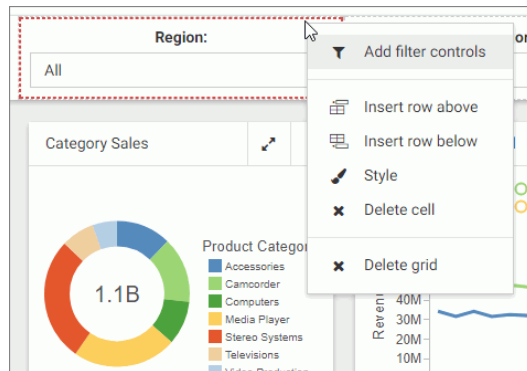
**Note:** The quickest way to create parameterized content featuring the same set of parameters is to start by creating a Reporting Object with desired parameters, and then using the Reporting Object to create content. To do so, right-click your Reporting Object, point to *New*, and then click *Chart* or *Report*.

3. Click the *Quick Filter* button.

The filter bar with all available filters appears above your content.

4. Optionally, customize your filter bar as described below.

- Right-click a cell to access shortcut menu options, as shown in the following image.



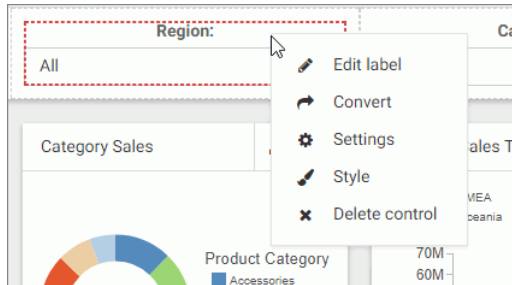
The available options are:

- Add filter controls.** Opens the Add Filter Controls dialog box, where you can choose from the list of available controls and add them to the filter grid.

**Note:** If all available filters display on the page, the Add Filter Controls setting is inactive.

- Insert row above.** Inserts an empty row above the current row in the filter grid.
- Insert row below.** Inserts an empty row below the current row in the filter grid.
- Style.** Opens the Properties panel, where you can customize the grid style and cell alignment.

- Delete cell.** Deletes the current cell.
- Delete grid.** Deletes the entire filter bar.
- Right-click a control to access shortcut menu options, as shown in the following image.



The available options are:

- Edit label.** Makes the label of the control an editable text.
 

**Note:** Another way to edit a control label is to double-click the field, type the new text, and press Enter.
- Convert.** Opens the Convert Control To dialog box, where you can choose between various control types.
- Settings.** Opens the Properties panel, where you can customize label position, label alignment, and control object width.
- Style.** Opens the Properties panel, where you can customize cell styling options.
- Delete control.** Deletes the current control.
- Drag any filter cell to a new location in the grid.
- Multi-select two controls, right-click one of them, and then click *Combine* to combine the two controls into one. An example of two combined controls is shown in the following image.



The Combine option only applies to dates and sliders.


- ❑ Drag a control into a cell with other controls. This action puts two separate controls into one cell. The drag marker is shown allowing you to position one controls in front or behind another control. You can separate the controls again by dragging one control out of the cell.
5. Save your changes.

### **Procedure:** How to Add Filters to a Page Manually

1. In the Resource selector, drag a parameterized item of your choice from the Resources tree to the canvas.

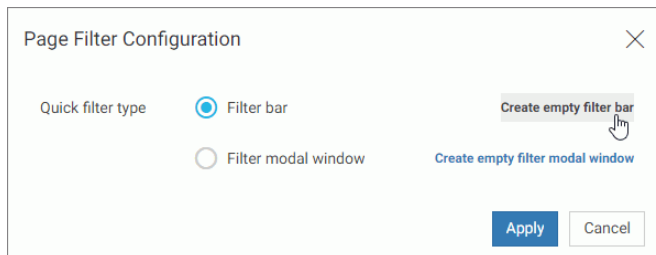
The Filter button appears on the toolbar, with the badge icon showing the number of available filters.

2. Optionally, add more content with the same set of parameters.

3. Click the *Page filter configuration* button .

The Page Filter Configuration dialog box opens.

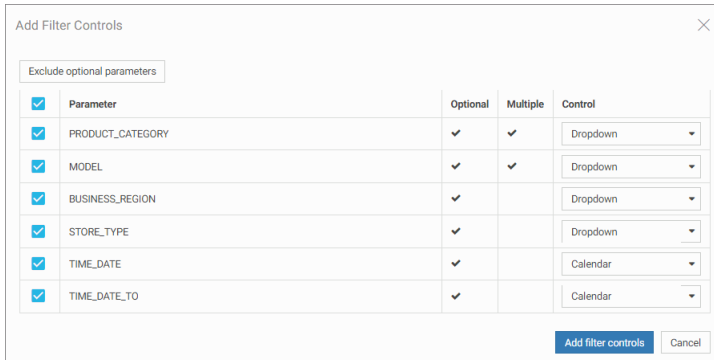
4. Click *Create empty filter bar*, as shown in the following image.



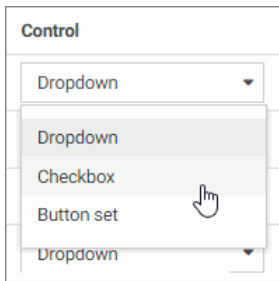
**Note:** If you prefer a floating modal window instead of a filter bar, click *Create empty filter modal window*.

5. Right-click inside any filter cell, and then click *Add filter controls*.

The Add Filter Controls dialog box opens, and lists all available controls selected by default, as shown in the following image.



6. Clear the controls that you want to exclude.
7. Optionally, change types of your controls where applicable by selecting a desired option in the Control column, as shown in the following image.



**Note:** When working with button sets, keep in mind that they look best when positioned in a single line.

8. Click *Add filter controls*.  
The controls are added to the filter bar.
9. Save your changes.

### **Procedure:** How to Add Filters to Page Using a Grid Container

1. In the Resource selector, drag a parameterized item of your choice from the Resources tree to the canvas.

The Filter button appears on the toolbar, with the badge icon showing the number of available filters.

2. Optionally, add more content with the same set of parameters.
3. In the Resource selector, click the *Containers* button.
4. Drag the Grid container onto the canvas.
5. Right-click inside the grid container, and then click *Add filter controls*.

The Add Filter Controls dialog box opens, and lists all available controls selected by default.

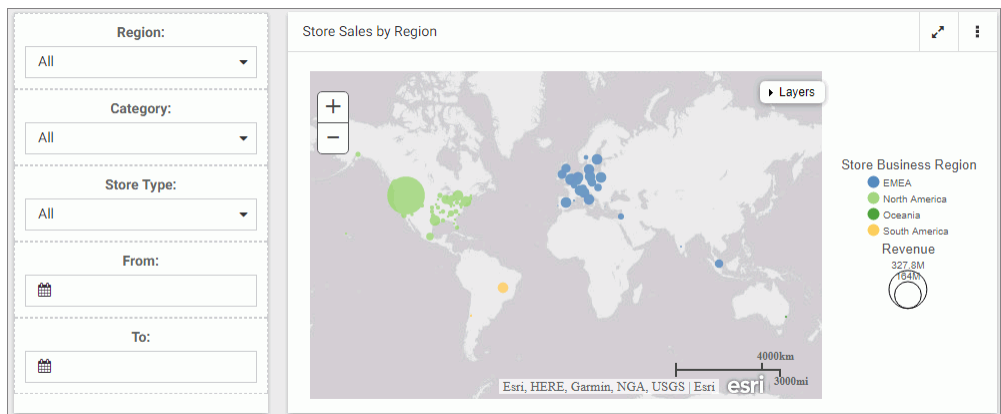
6. Clear the controls that you want to exclude.
7. Click *Add filter controls*.

The controls are added to the grid container.

**Note:** You can also drag a control from the filter bar to a grid container directly, if the filter bar is open and populated with controls.

8. Optionally, move and resize your grid container and content to achieve the desired alignment.

An example of a simple layout featuring a grid container with filter controls is shown in the following image.

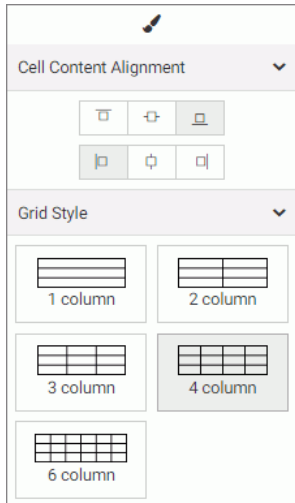


9. Save your changes.

## Configuring Filter Control and Filter Grid Properties

You can configure the properties of the filter grid using the Properties panel, which is context-sensitive. For example, when you click a filter cell, the cell style properties open in the Properties panel. When you click a filter control, the general and style properties for this control open in the Properties panel.

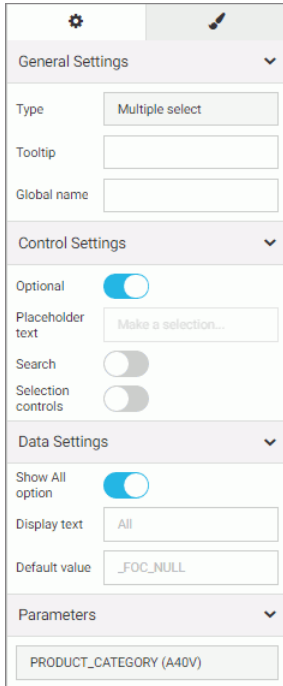
The Properties panel for a cell is shown in the following image. When you configure these properties, you modify the alignment of content within a cell or change the style layout of the filter grid.



The properties for a grid cell are:

- Cell Content Alignment.** Controls the alignment of the label and control inside the cell. The options include top, middle, bottom, left, center, and right.
- Grid Style.** Controls the grid layout of the filter bar. The options include 1-Column, 2-Column, 3-Column, 4-Column, and 6-Column.

The Properties panel for a filter control is comprised of two tabs: general and style properties. The settings tab is displayed in the following image. Using these properties, you can view the type of filter control that shows on the page, add a tooltip or placeholder text, and set the default value.



The screenshot shows a settings panel with the following sections and values:

- General Settings**
  - Type: Multiple select
  - Tooltip: (empty text box)
  - Global name: (empty text box)
- Control Settings**
  - Optional:
  - Placeholder text: Make a selection...
  - Search:
  - Selection controls:
- Data Settings**
  - Show All option:
  - Display text: All
  - Default value: \_FOC\_NULL
- Parameters**
  - PRODUCT\_CATEGORY (A40V)

The settings tab contains the following properties:

- General Settings.** This section includes the following options:
  - Type.** Displays the type of the control.
  - Tooltip.** Displays a tooltip when you hover over the filter control.
  - Global name.** Designates a global name to the control.
- Control Settings.** This section includes the following options:
  - Optional.** Toggles between optional and required control.
  - Placeholder text.** Enables a configurable placeholder text that you can show users inside a required control when it has no value. The default text is *Make a selection*.
  - Search.** Adds a search field to the filter drop-down menu.



**Note:** If the select list contains 50 or more values the Search option is enabled automatically.

- Selection controls.** Adds *Select all* and *Clear* buttons to the filter drop-down menu. This property is only available for multiple select lists.

**Note:** The Selection controls and Show All options cannot be selected at the same time.

- Data Settings.** This section includes the following options:

- Show All option.** Adds an All option to the control that the user can select.

**Note:** Choosing this option results in the parameter receiving a `_FOC_NULL` value. If this parameter is used in a WHERE condition, it results in the WHERE condition being removed from the request and all data values for this field displaying the page.

- Display text.** Allows you to specify a custom value for the Show All option in the control. The default text is *All*.

- Default value.** Displays the default value of the control. For optional parameters you can edit this field and override the control value.

- Parameters.** Shows the name of the parameters that are associated with this control.

The style tab is displayed in the following image. Similar to the properties of a cell, you can modify the positions of labels in a control, define the alignment, and set the object width.

The image shows a configuration panel for a filter control. It is organized into several sections, each with a title and a dropdown arrow:

- Label Position:** Contains four icons representing different label positions: above, right, left, and no label.
- Label Alignment:** Contains three icons representing different alignments: left, center, and right.
- Direction:** Contains two buttons: "Horizontal" and "Vertical".
- Label/Control Split:** Contains a double-headed arrow icon, an "Auto" button, and a grid of eight buttons with numerical values: 25/75, 33/67, 40/60, 50/50, 60/40, 67/33, and 75/25.
- Control Object Width:** Contains a double-headed arrow icon, an "Auto" button, a double-headed arrow icon, a "Max" button, and a grid of seven buttons with percentage values: 20%, 25%, 33.33%, 40%, 50%, 60%, 66.66%, 75%, and 80%.
- Control Object Height:** Contains a "Max height" label and a text input field with the value "150px".

The style properties are:

- Label Position.** Controls the position of the filter label in the relation to the control. The options are above, right, left, and no label.
- Label Alignment.** Controls the alignment of the filter label. The options are left, right, and center.

- Direction.** Controls the alignment of the elements inside the control. This property is available for radio button, check box and button set controls. The options are horizontal and vertical. The vertical option is enabled, by default, when the control has five or more values.
- Label/Control Split.** Controls the space ratio between the label and control inside the cell. This option is only available when the label position is set to right or left.
- Control Object Width.** Sets the width of the control in relation to the filter cell. The options are:
  - Auto.** Adjusts the width of the control automatically to accommodate the name of each value.
  - Max.** Fills the entire filter cell. This is the default value.
  - Percentages.** Set the control width to various percentages, as they relate to the filter cell.
- Control Object Height.** Sets the maximum height of the control. If the list of elements exceeds the maximum height of the control, a scrollbar is added to this control. This property is available for radio button, checkbox and button set controls when their Direction property is set to vertical. The default value is 150px. You can change this value as necessary.

## Using Filters in WebFOCUS Designer

WebFOCUS Designer filter controls are versatile and allow you to facilitate multiple filtering scenarios. Depending on the needs of your enterprise and on the specifics of the data that you are using, you can configure filter controls to fit your unique needs. Examples below show you different types of controls and how to use them.

### Choosing an Event Model for Your Page Filter

WebFOCUS Designer supports two event models for passing parameters to your page content:

- On-selection Change.** Whenever you change a value of any filter control on the page, parameterized content refreshes to reflect your selection. This model is enabled, by default.
- Submit Button.** After you make all desired changes to filter controls on the page and click the *Submit* button, parameterized content refreshes to reflect all your selections. This model can be enabled by dragging a Submit button control into the filter grid.

**Procedure: How to Use One-selection Change Filters**

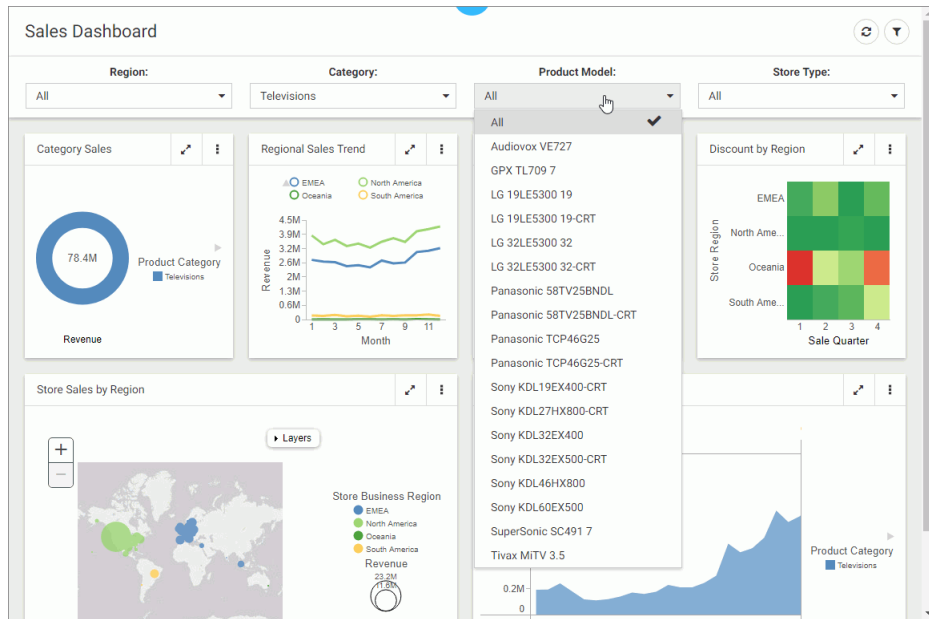
1. Add filters to a page as described in [Adding Filters to a Page](#) on page 49.
2. Click the *Preview* button.

The preview mode is activated, allowing you to interact with content and filters.

3. Make filter selections.

Each time you make a selection, the content refreshes to reflect it.

**Note:** Notice that the filter controls are chained in such a way that each selection automatically reflects the available choices in other filters. In our example, we set *Category* to *Televisions*. Now, the Product Model filter only shows models of televisions, as shown in the following image. WebFOCUS Designer chains controls automatically, if the parameters are defined in the metadata layer with the WITHIN keyword to relate them.



4. Exit the preview mode and save your changes.

**Procedure: How to Use Filters With a Submit Button**

1. Add filters to a page, as described in [#unique\\_58](#).
2. From the Resource selector, click the *Controls* tab, and then drag the *Submit* button onto the filter grid.

The Submit and Reset buttons display in the filter grid.

3. Optionally, customize the Submit and Reset buttons in any of the following ways:

- Align the Submit and Reset buttons by selecting the cell in which the buttons reside and customize the Cell Content Alignment option on the Style tab of the Properties panel. In this example, we selected *Align control bottom* and *Align control center*.
- Add a tooltip to the buttons by selecting each one and populating our the Tooltip field on the Settings tab of the Properties panel.
- Customize the width of the buttons in relation to the filter cell by selecting one of the options under the Control Object Width property. In this example we selected 50%.

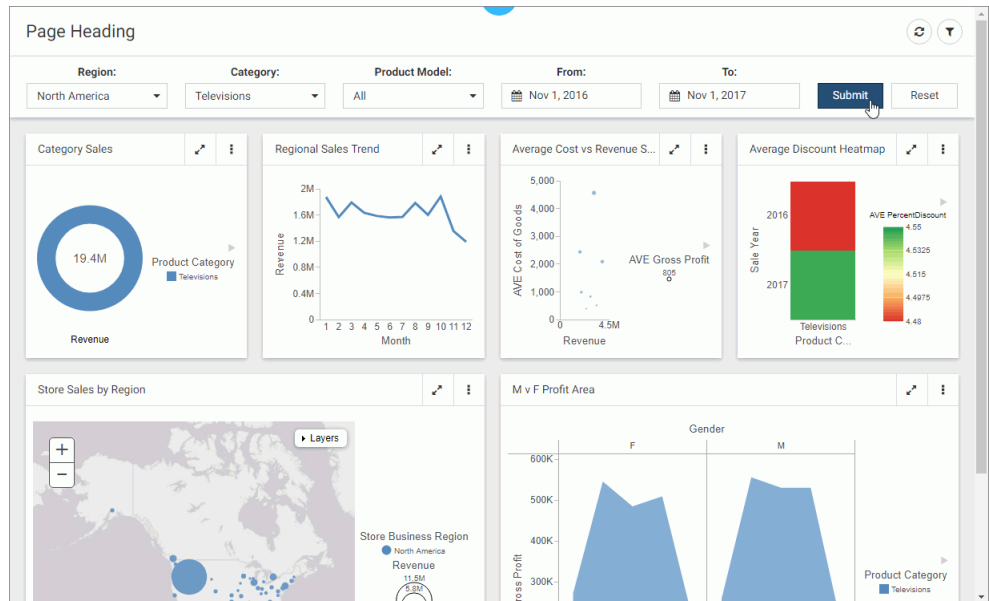
**Note:** You can delete one or both buttons by right-clicking them and clicking *Delete*.

4. Click the *Preview* button.

The preview mode is activated, allowing you to interact with content and filters.

5. Make filter selections and click *Submit*.

The content refreshes to reflect all your selections upon clicking the Submit button, as shown in the following image.



6. Click *Reset*.

The filters return to their default values.

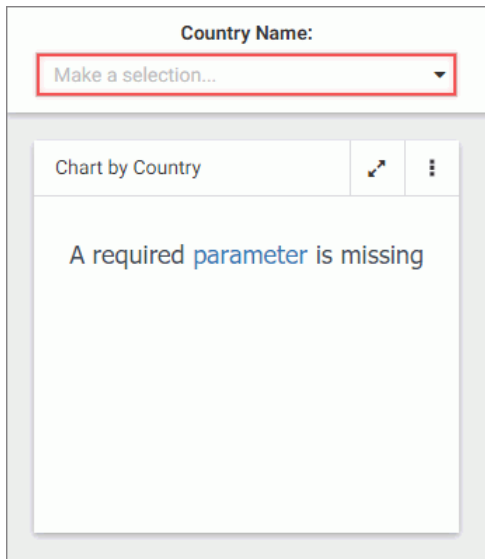
7. Optionally, click *Submit* again to refresh the content with the default values.

**Note:** If you deleted the Reset button in the previous step, you must select default values manually, and then click *Submit* to return to the default state.

8. Exit the preview mode and save your changes.

## Working With Required Parameters

When you have required parameters in your content, WebFOCUS Designer interprets them as required filter controls. Required controls are marked in red, prompting you to make a selection for the request to be processed. The image below shows an example of a required filters control.



With a required parameter in place, your content does not refresh until you select filter values.

There are two ways to create a required filter control:

- By adding a required parameter to a chart or report in InfoAssist.
- By converting an optional control to a required one in WebFOCUS Designer.

### **Procedure:** How to Add a Parameter to a Content Item

1. On the WebFOCUS Home Page, on the actions bar, click *Report* or *Chart*.  
The Open dialog box opens.
2. Select a data source in the Open dialog box and click *Open*.  
InfoAssist opens.

3. Create a report or chart.

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

4. On the *Data* tab, click *Filter*.

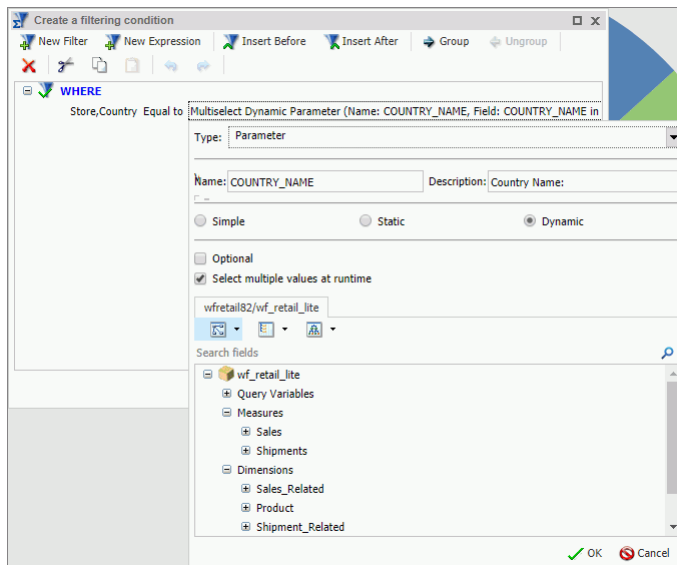
The Create a filleting condition dialog box opens.

5. Double-click the *Double-click or press F2 to edit* text, select a field, leave the condition at *Equal to*, and then click *Value*.

The drop-down dialog box opens.

6. Set the *Type* field to *Parameter* and select the *Dynamic* radio button.
7. Optionally, select the *Select multiple values at runtime* check box to create a multiple select filter control and *Optional* check box to create an optional filter control.

In our example, we are creating a multiple select required control. An example of a complete configuration is shown in the following image.



8. Save your changes and exit InfoAssist.
9. In WebFOCUS Designer, in the Resource selector, drag your new content item to the canvas.

The content item does not load. Instead, a blank container displays a message: *A required parameter is missing*. The Quick Filter button appears on the toolbar with the badge icon showing one available filter.

10. Click the *Quick Filter* button.

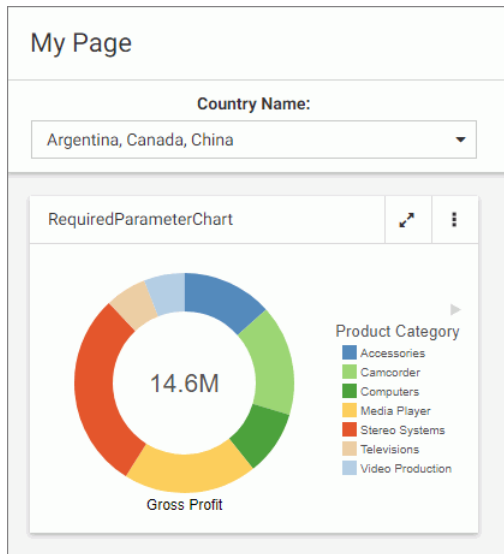
The filter bar with one filter appears above the content item. The filter control is marked in red and the *Make a selection* text displays inside the control field.

11. Click the *Preview* button.

The preview mode opens.

12. Select one or more values from the list.

The filter control is no longer red. It displays your selections. The content refreshes to reflect the filter values, as shown in the following image.



13. Exit the preview mode and save your changes.

**Procedure: How to Convert an Optional Filter Control to a Required One**

1. In WebFOCUS Designer, add filters to a page, as described in [Adding Filters to a Page](#) on page 49.

2. Click an optional filter control and then click the *Properties* button .

The Properties panel opens.

3. In the Settings tab, disable the *Optional* setting and then disable the *Show All option* setting.

The filter control is marked in red and the *Make a selection* text displays inside the control field.



4. Click the *Preview* button.  
The preview mode opens. The content does not refresh.
5. Select a value for the required filter control.  
The content refreshes to reflect your selection.
6. Exit the preview mode and save your changes.

## Working With Single and Multiple Select Lists

There are two types of list controls in WebFOCUS Designer:

- Single Select List.** Allows you to pick a single value at run time.
- Multiple Select List.** Allows you to pick multiple values at run time.

An example of a single select list control is shown in the following image.

Region:	
North America	▼
EMEA	
North America	
Oceania	
South America	

Once you have made a selection in a single select list, your content instantly refreshes to reflect that selection.

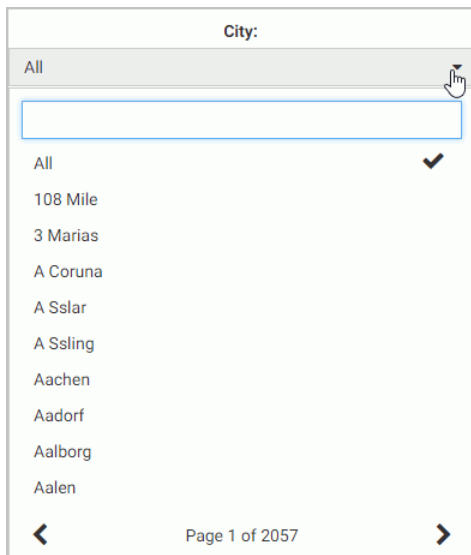
An example of a multiple select list control is shown in the following image.

Category:	
Accessories, Camcorder, Computers	▼
All	
Accessories	✓
Camcorder	✓
Computers	✓
Media Player	
Stereo Systems	
Televisions	
Video Production	

Once you have made all your selections in the multiple select list, you must click outside of the control for the content to refresh.

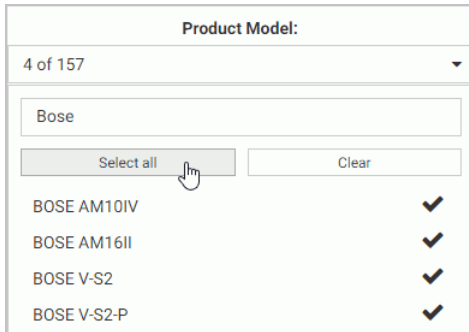
You can customize your list controls with the search feature by enabling the *Search* setting in the Properties panel. Once enabled, it adds the search field to your list and allows you to quickly navigate to a specific value. Simply start typing any word or syllable and all values that contain it will display. When a list contains 50 or more values, the search feature is enabled automatically. You can disable it at any time by disabling the *Search* setting in the Properties panel.

If a list contains 200 or more values, the paging feature is added to the bottom of the control. When paging is active, 10 values display per page. An example of a long list with the paging feature enabled is shown in the following image.



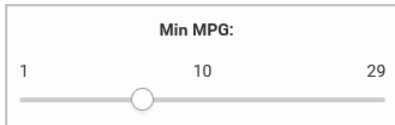
You can further enhance a multiple select list by enabling the *Selection controls* option in the Properties panel. Once enabled, it adds the *Select all* and *Clear* buttons to the list. This feature is especially useful when you need to eliminate just a few values from your results. You can click *Select All*, clear the values that you need to eliminate, and click outside of the control to refresh your content.

If the *Selection controls* and *Search* features are enabled at the same time, you can use the *Select all* button to select all search results, as shown in the following image.



### Working With Slider Controls

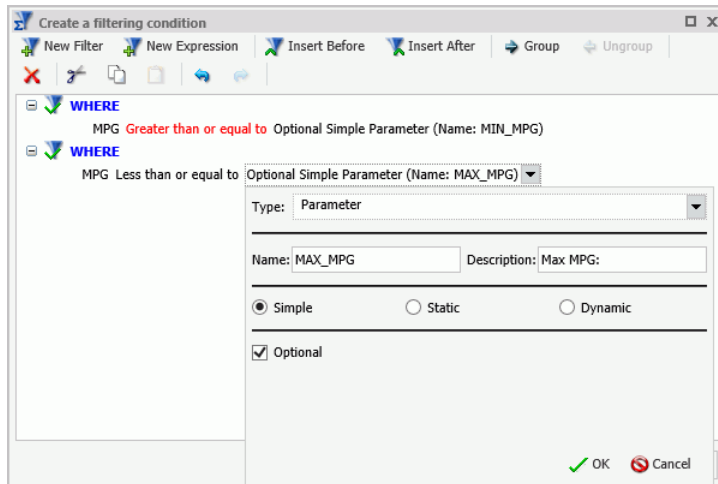
A slider control is a horizontal track with a marker that you can slide between a minimum and maximum value. This versatile control is often used to choose a value within a fixed range. An example of a slider control is shown in following image.



#### **Procedure:** How to Create a Slider Control

1. On the WebFOCUS Home Page, on the actions bar, click *Report* or *Chart*.  
The Open dialog box opens.
2. Select a data source in the Open dialog box and click *Open*.  
InfoAssist opens.
3. Create a report or chart.  
To learn more about creating content in InfoAssist, see the *WebFOCUS InfoAssist User's Manual*.
4. On the *Data* tab, click *Filter*.  
The Create a filleting condition dialog box opens.
5. Create two parameters representing minimum and maximum values and make them optional.

In this example we create the minimum and maximum parameters for the MPG field in the car report. An example of the completed filtering condition is shown in the following image.



6. Save your changes and exit InfoAssist.
7. One the Home Page, right-click your new content item, and then click *Edit with text editor*.  
The Text Editor window opens.
8. Edit the syntax by providing the data range values.

An example of the modified syntax is shown in the following image.

```

IBFS:WFC/Repository/Public/ReportSlider
File Edit Search Options Help

ENGINE INT CACHE SET ON
SET PAGE-NUM=NOLEAD
SET SQUEEZE=ON
-DEFAULTH &WF_HIMLENCODE=ON;
SET HIMLENCODE=&WF_HIMLENCODE

SET HIMLCSS=ON
-DEFAULTH &WF_EMPTYREPORT=ON;
SET EMPTYREPORT=&WF_EMPTYREPORT

-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
-DEFAULT &MIN_MPG = 10;
-DEFAULT &MAX_MPG = 20;
TABLE FILE ibisamp/car
SUM CAR.SPECS.MPG
BY CAR.COMP.CAR
BY CAR.CARREC.MODEL
WHERE CAR.SPECS.MPG GE &MIN_MPG. (FROM 1 TO 29|FORMAT=D6).Min MPG.;
WHERE CAR.SPECS.MPG LE &MAX_MPG. (FROM 2 TO 30|FORMAT=D6).Max MPG.;
ON TABLE PCHOLD 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, HFREEZE=OFF, $
ENDSTYLE
END

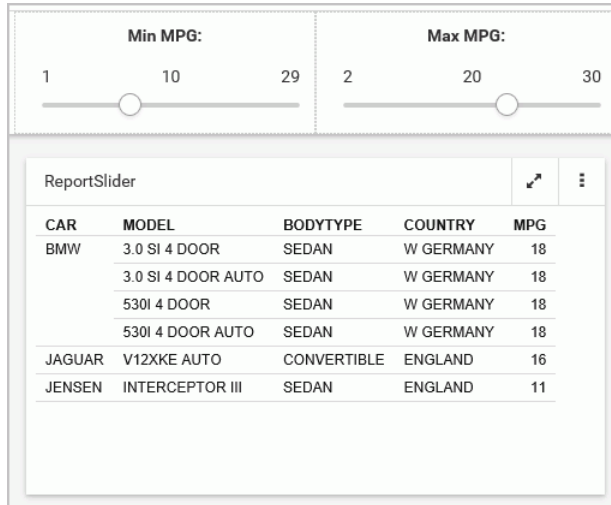
-RUN

Line: 1      Column: 1

```

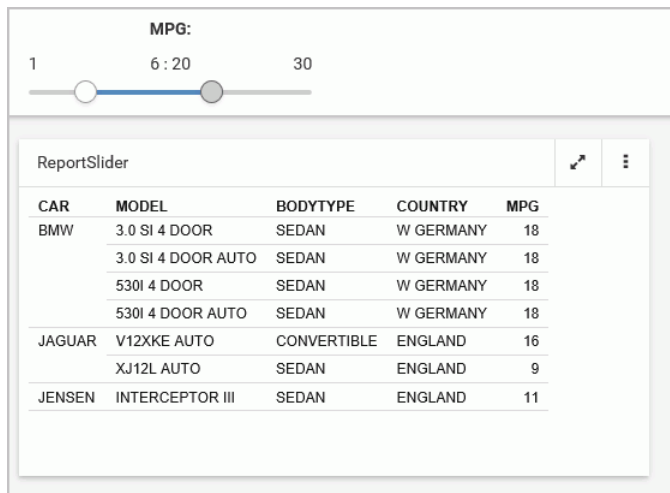
9. Save your changes and exit the Text Editor.
10. In WebFOCUS Designer, in the Resource selector, drag your new content item to the canvas.  
The Quick Filter button appears on the toolbar with the badge icon showing two available filters.
11. Click the *Quick Filter* button.

The slider controls display in the filter grid, as shown in the following image.



- Optionally, combine two controls together. Multi-select both controls, right-click one of them, and then click *Combine*.

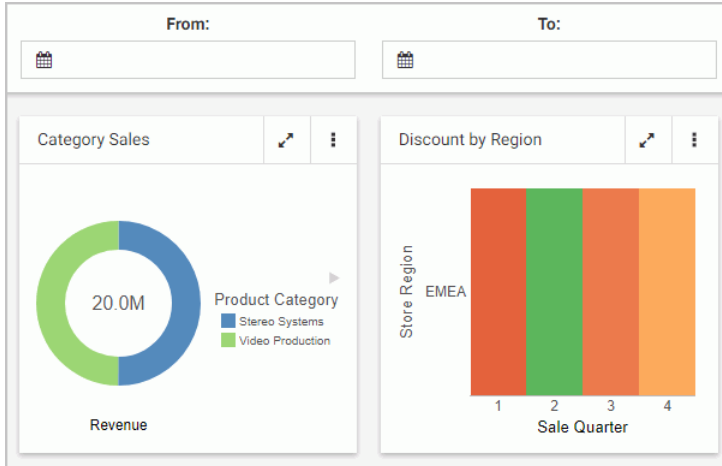
Your controls are combined. You can edit the label to reflect your new combined control. An example of the combined slider control is shown in the following image.



- Save your changes.

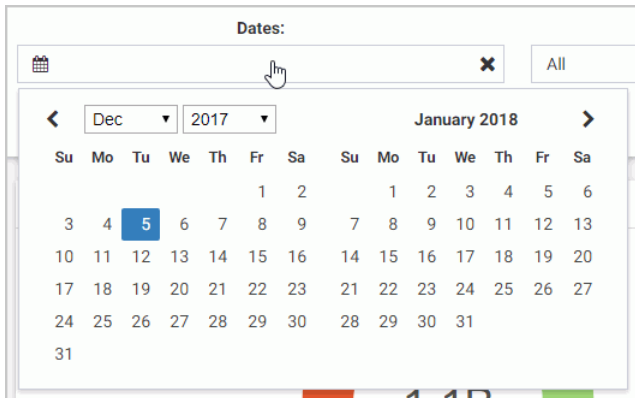
## Working With Date Controls

Parameters that contain date ranges are recognized by WebFOCUS Designer as date range controls. An example of the date range controls on the page is shown in the following image.



The calendar feature inside a date control allows you to select a specific date value. Once you pick a specific date, it is always spelled out, so that it can be supported by all internationalized applications.


Optionally, you can combine two date control into one date range control. To do so, multi-select two date controls and then click *Combine*. An example of a combined date range control is shown in the following image.

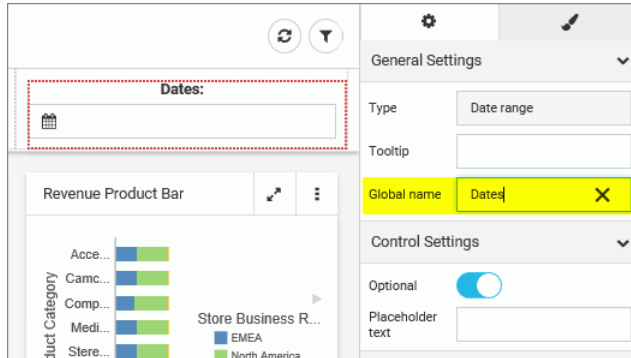


## Using Global Name to Synchronize Filter Controls

The Global Name property is a powerful tool that allows you to quickly synchronize filter control values between different pages. The Global Name property is configured on the Settings tab of the Properties panel for a filter control. Once enabled, it allows you to match your filter selections across multiple pages at run time within the same browser session.

### **Procedure:** How to Configure Global Name Filter Control Property

1. In WebFOCUS Designer, add filters to a page, as described in [Adding Filters to a Page](#) on page 49.
2. Click a filter control that you want to synchronize and then click the *Properties* button . The Properties panel opens.
3. In the Settings tab, populate the *Global Name* field, as shown in the following image.



**Note:** You can choose any text as a global name for your control. Combined controls, such as date ranges and slider controls, have a single global name property.

4. Optionally, repeat step 3 for all the filter controls that you want to synchronize.
5. Save the page.
6. Create a second page, populate it with parameterized content, and add the same set of filter controls as you did in step 1.

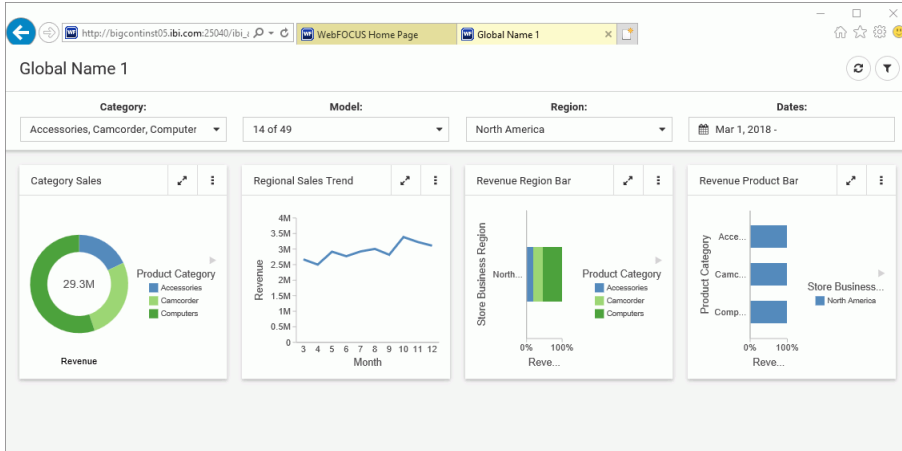
**Note:** To streamline this process, you can use the Save As option to create a new version of the existing page, leave the configured filters intact, and replace the content on the canvas. Make sure the Global Name values are identical between the filter controls on both pages.

7. Save the second page and exit WebFOCUS Designer.
8. Run one of your newly created pages.



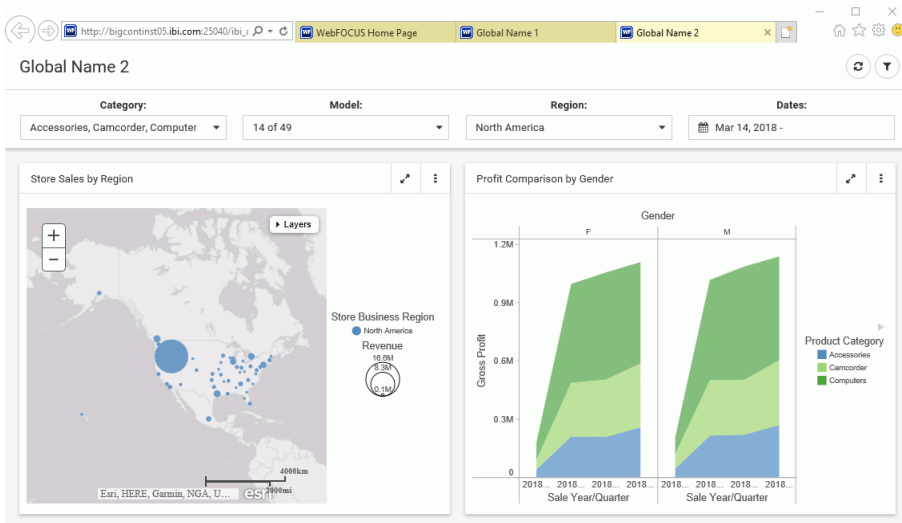
9. Select filter control values.

An example of the filter control selections is shown in the following image.



10. Run the second page.

The page runs with the same filter control values as the ones you have selected on the previous page, as shown in the following image.



11. Optionally, change the filter control values on the second page and see how they synchronize with the ones on the first page.





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# WebFOCUS

Using WebFOCUS Designer  
Release 8.2 Version 04



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