



Module 1: Introduction → Lesson 2: Goals of the Self-Service Learning Modules

Welcome to *Module 1, Lesson 2*. This lesson summarizes the goals and objectives of the WebFOCUS Business User Edition self-service learning project.

The project is comprised of four modules, which include a combination of lessons and tutorials, entitled Try It!, to enable you to put the fundamental concepts of WebFOCUS Business User Edition into practice immediately.

Module 1: Introduction, provides you with a first look at WebFOCUS Business User Edition where key features are introduced. In addition, you will learn to navigate the WebFOCUS Business User Edition Portal.

The main objectives for Module 1 are to:

- Understand the central use case that is used as a framework for the WebFOCUS Business User Edition self-service learning project.
- Understand the structure and goal of each WebFOCUS Business User Edition self-service learning module.
- Independently navigate the entire WebFOCUS Business User Edition Portal environment.
- Learn about the key features of the WebFOCUS Business User Edition.

Module 2: Managing Your Resources, teaches you all of the key aspects of domain and user management in WebFOCUS Business User Edition. These are the options that enable you to organize content, manage users and groups, and configure system properties that are used by WebFOCUS Business User Edition.

The main objectives for Module 2 are to:

- Create domains for users and manage their contents.
- Learn how to create users with different roles and assign them into corresponding groups.
- Access and navigate the Resources tree to explore and validate menus and options.
- Understand the basics of Change Management.
- Use the WebFOCUS Administration Console to access and manage system settings.

Module 3: Uploading and Connecting to Data, demonstrates the features and capabilities of the Upload Data and Connect to Data Wizards. Now that you have mastered all of your resources, and can navigate the WebFOCUS Business User Edition Portal, it's time to start working with real data. The lessons in this module will enable you to quickly upload an Excel spreadsheet into WebFOCUS Business User Edition or connect to an existing data source, for example, Microsoft SQL Server, to connect to your data.

The main objectives for Module 3 are to:

- Learn how to upload a Microsoft Excel spreadsheet using the Upload Wizard.
- Learn how to connect to an external data source to access your data using the Connect to Data Wizard.

Module 4: Creating Content, introduces you to the fundamentals of InfoAssist+ to create reports, individual charts, multi-page documents, or to analyze data and patterns in visualizations. Now that you have uploaded or connected your data to WebFOCUS Business User Edition, you can begin developing content for use within your organization to gain insight into your data or make better, informed decisions.

For example, you may want to create a Choropleth map to spot recent sales trends in your data for the Northeast region of the United States, and then add this map to a personal page for your next presentation to stakeholders. If you want to get started even faster, you can use the Content Generator to automatically create sample content based on your uploaded data.

The main objectives for Module 4 are to:

- Understand how to access InfoAssist+ and familiarize yourself with the user interface.
- Understand how to quickly generate and use sample content based on your uploaded data.
- Learn how to create, edit, and save new reports using InfoAssist+.
- Learn how to create, edit, and save new charts using InfoAssist+.
- Learn how to create, edit, and save new visualizations using InfoAssist+.
- Learn how to create, edit, and save new documents using InfoAssist+.

Module 5: Using Your Content, teaches you how to quickly create distribution lists and manage schedules in the WebFOCUS Business User Edition. This allows you to automatically send reports to key members in your department and organization.

The main objectives for Module 5 are to:

- Learn how to create distribution lists to deliver your content to a wider audience.
- Learn how to schedule the distribution of your content based on a defined timeframe.

You are now ready to move on the Module 1, Lesson 3, which provides an overview and first look at the WebFOCUS Business User Edition environment.