

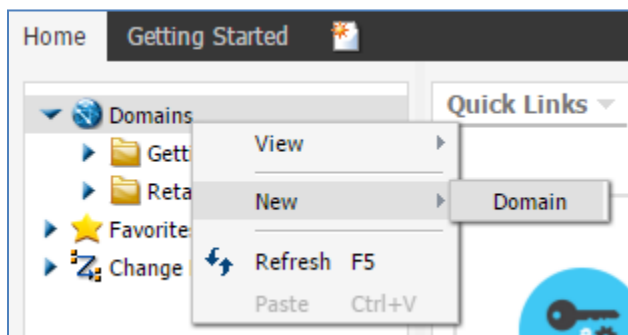


## Module 2: Managing Your Resources → Lesson 1: Creating Domains → *Try Now!*

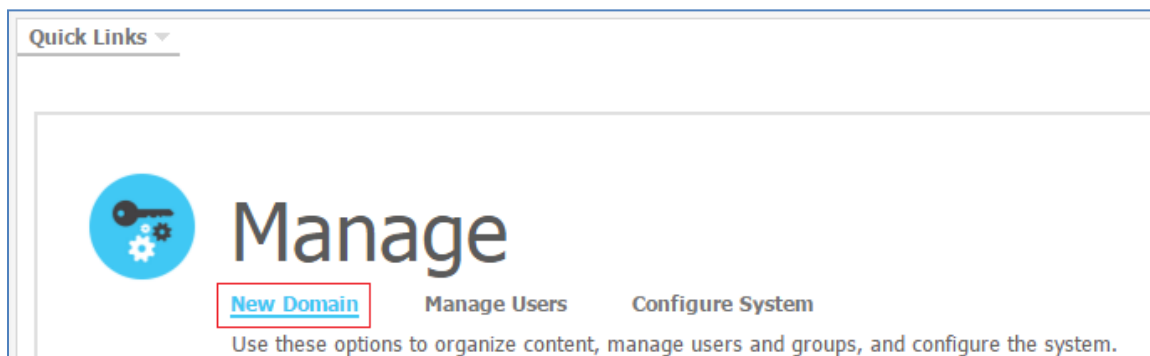
In this *Try Now!* exercise, you will be creating and exploring a new domain called **Sales** in the WebFOCUS Business User Edition Portal, from which you will store and manage your Sales content, such as reports, charts, visualizations, documents, and dashboards.

For this exercise, suppose that you also recently received a request from your director to create a new domain called **Marketing**, so that you can share related content with your organization's Marketing department.

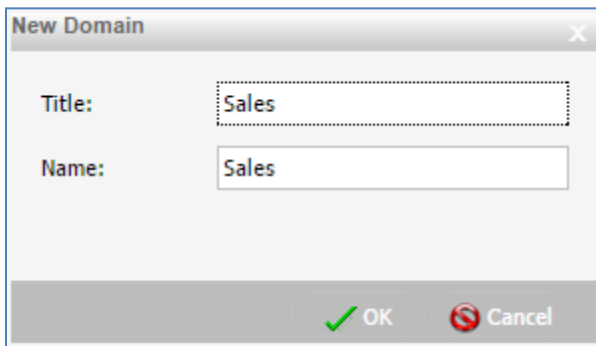
1. In the Resources tree on the Home page, right-click *Domains*, select *New* from the context menu, and then click *Domain*.



You can also click *New Domain* in the Quick Links tab, as shown in the following image.

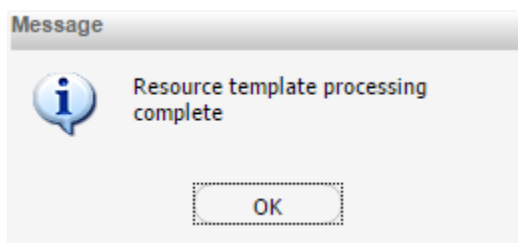
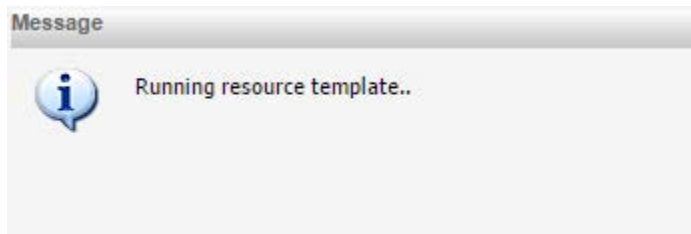


The New Domain dialog box opens, as shown in the following image.



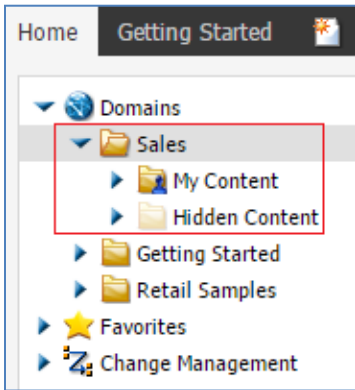
2. Type *Sales* in the Title field and then click *OK*.

Two brief messages are displayed, as shown in the following images.



3. Click *OK*.

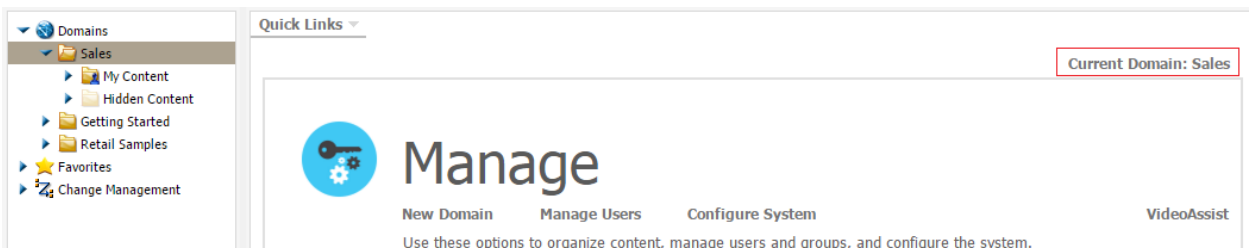
Your new domain called Sales is added as a folder under the Domains node, as shown in the following image.



Within the new Sales domain, a My Content folder is created by default, which contains all of the content that you create in the WebFOCUS Business User Edition Portal. The Sales domain and its content will remain private unless you provide authorization to share it with other users, or a user with the ability to manage private content for another user publishes it. An inaccessible Hidden Content folder is also created by default.

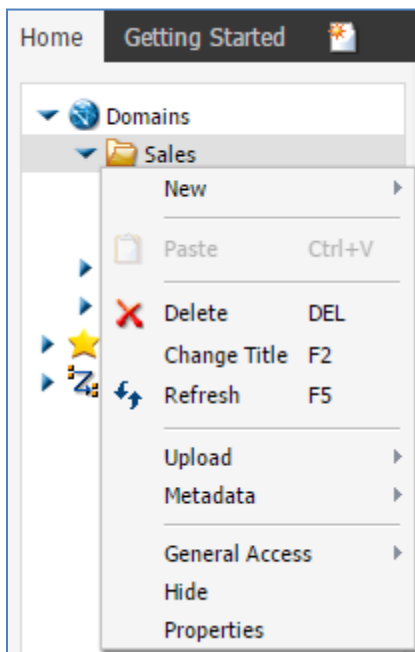
When you create a new domain, the WebFOCUS Business User Edition automatically creates a new group for the domain itself, and creates subgroups for each of the four user types within it. (*Manager users, Developers, Advanced users, and Basic users*). In addition, a corresponding application folder is created on the WebFOCUS Reporting Server. This application folder is where metadata for the domain will be stored.

Notice that when the *Sales* domain is selected in the Resources tree, the Current Domain indicator in the Quick Links tab also displays *Sales*. This is a useful reminder to let you know that any new content that is created will be associated with the domain that is currently selected, which in this case is *Sales*.



4. Right-click the *Sales* domain folder in the Resources tree.

You are provided with a set of context menu options, as shown in the following image.



Using these context menu options, you can quickly create new content for your Sales domain (for example, a new chart) or even additional folders to help you organize your Sales domain even further.

The following context menu options are available when you right-click any domain in the Resources tree:

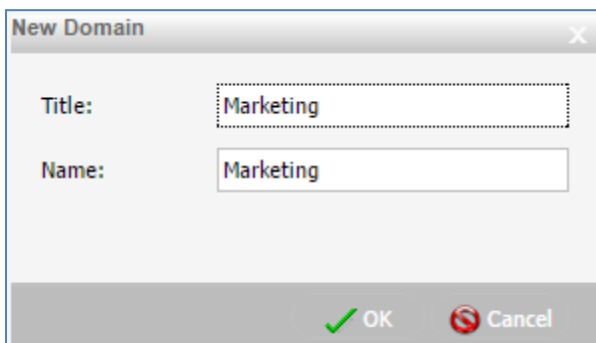
- **New.** Provides access to the following options:
  - **Report.** Opens InfoAssist+, where you can create a report.
  - **Chart.** Enables you to create a chart in InfoAssist+.
  - **Document.** Enables you to create a document in InfoAssist+.
  - **Visualization.** Opens InfoAssist+, where you can create visualizations.
  - **Shortcut.** Creates a shortcut to a Repository Resource or a Master File.
  - **URL.** Launches the Create URL dialog box, where you can create a link to a webpage.

- **Distribution List.** Launches the Distribution List tool, where you can create distribution lists.
  - **Folder.** Creates a new folder.
- **Delete.** Deletes the selected domain and its contents.
- **Change Title.** Launches a dialog box, where you can change the title of the selected domain.
- **Refresh.** Refreshes the content of the selected domain.
- **Upload.** Enables you to upload data such as a Microsoft Excel spreadsheet (using the *Upload Data Wizard*), a document, or an image.
- **Metadata.** Enables you to connect to data that resides on another relational database (using the *Connect to Data Wizard*) or edit an existing synonym.
- **General Access.** Allows you to provide *All Users* access to this domain or only the user types in the *Domain Groups* for the selected domain.
- **Hide.** Allows you to hide the selected domain. When a domain is hidden, this context menu option changes to *Show*.
- **Properties.** Displays the properties of the selected domain.

Now let's also create a new domain for the Marketing department in your organization.

5. Right-click *Domains*, select *New* from the context menu, and then click *Domain*.

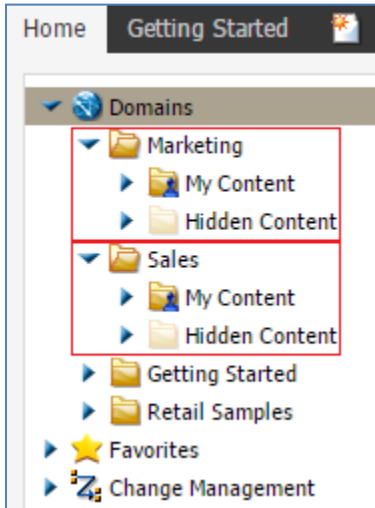
The New Domain dialog box opens, as shown in the following image.



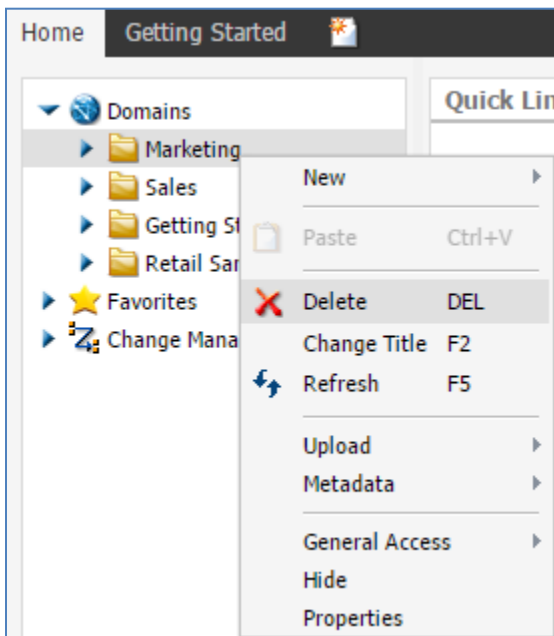
The image shows a 'New Domain' dialog box. The title bar reads 'New Domain' and includes a close button (X). The dialog contains two text input fields. The first field is labeled 'Title:' and contains the text 'Marketing'. The second field is labeled 'Name:' and also contains the text 'Marketing'. At the bottom of the dialog, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red 'X' icon.

6. Type *Marketing* in the Title field and then click *OK*.
7. After the message indicating that the resource template process has completed, click *OK*.

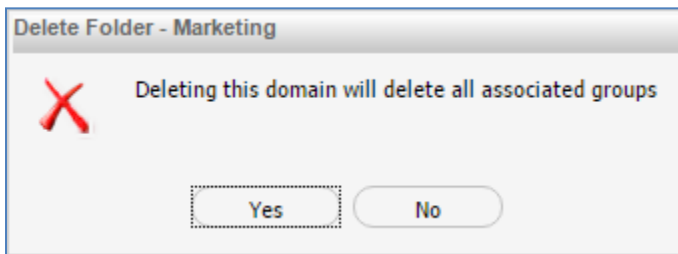
Your new domain called Marketing is also added as a folder under the Domains node. You have just successfully created two new domains in the WebFOCUS Business User Edition Portal (one for your Sales department and the other for your organization's Marketing department), as shown in the following image.



8. To delete a domain at any time, right-click a domain and select *Delete* from the context menu, as shown in the following image.



You are prompted with a message to confirm this action, as shown in the following image.



9. If you click Yes, the selected domain, all of the groups associated with the domain, and the corresponding application folder that was created on the WebFOCUS Reporting Server will be deleted.

**Note:** Even though deleting a domain automatically deletes the groups associated with it, this action does not delete the users assigned to those groups. Users from the deleted groups remain in the Users area of the Security Center, but, unless they are assigned to another group, they are limited to view only privileges. To restore privileges to these users, you must assign them to a new group.

You are now ready to move on to *Module 2, Lesson 2*, where you will learn how to create new users for the WebFOCUS Business User Edition portal and then assign these users into groups based on roles.