



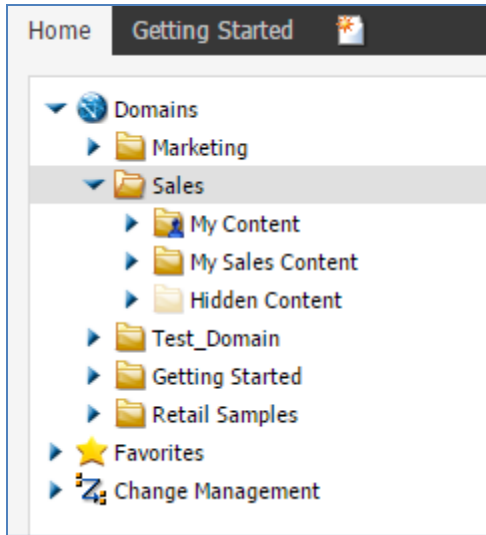
Module 2: Managing Your Resources → Lesson 3: Navigating the Resources Tree → Learn

Welcome to *Module 2, Lesson 3*. In this lesson, we will review all of the essential navigation aspects that you should be familiar with in the Resources tree of the WebFOCUS Business User Edition portal.

After you sign in, the main components of the portal include the *Getting Started* page, the *Home* page, which provides access to the *Resources* tree, and the *Quick Links* tab, and the *Menu* bar.

A screenshot of the WebFOCUS Business User Edition portal home page. The page has a dark header with the 'WebFOCUS' logo on the left and navigation links for 'Manager', 'Tools', 'Administration', 'Resources', 'Help', and 'Sign Out' on the right. Below the header is a navigation bar with 'Home' and 'Getting Started' tabs. The main content area is divided into a left sidebar and a main panel. The sidebar, titled 'Domains', contains a tree view with folders for 'Marketing', 'Sales', 'Test_Domain', 'Getting Started', 'Retail Samples', 'Favorites', and 'Change Management'. The main panel, titled 'Quick Links', shows three primary sections: 'Manage' (with sub-links for 'New Domain', 'Manage Users', 'Configure System', and 'VideoAssist'), 'Connect' (with sub-links for 'Connect to Data' and 'Upload Data', and 'VideoAssist'), and 'Create' (with sub-links for 'Report', 'Chart', 'Document', 'Visualization', and 'VideoAssist'). A footer note mentions the 'Information Center' for technical content.

The *Resources tree*, located on the left side of the Home page, is a repository that contains all of your available resources, such as domains, folders, and content (for example, reports and charts).

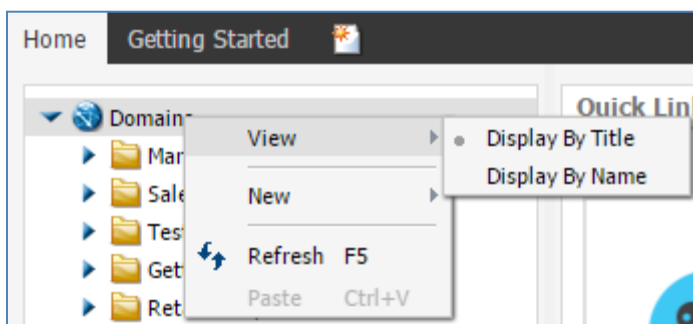


All of these resources are secured and access is determined by the group to which you are assigned. For example, a Basic User can view only public content in the Resources tree.

The Resources tree contains the following nodes:

- **Domains.** Lists the available domains and folders that you have created within the domains to organize your content. By default the Domains node contains two sample domains, the Getting Started domain and the Retail Samples domain.
- **Favorites.** Lists any content that you have designated as a Favorite.
- **Change Management.** Lists the Import and Export facilities and Change Management packages.

Right-clicking items in the Resources tree open context menus with the available options that are specific to the item that you choose.



The available options include:

View. This option is only available for the Domains node, and includes:

- **Display By Title.** Displays folders by title. The default display.

- **Display By Name.** Displays folders by name.

New. This option is only available for the Domains node, and includes:

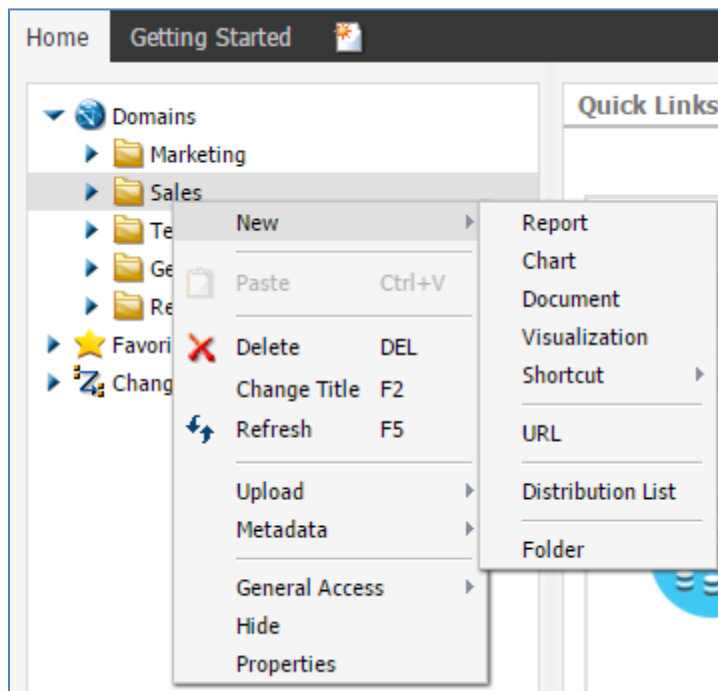
- **Domain.** Creates a new domain.

Refresh. Refreshes the Resources tree. The option is available for all nodes.

Paste. Pastes content under the applicable node.

Clear Favorites. Clears the Favorites list. This option is only available for the Favorites node.

In general, when you right-click an item in the Resources tree, the options displayed in the context menu are determined by the selected item type, and the tools and features you are permitted to access based on your assigned group.

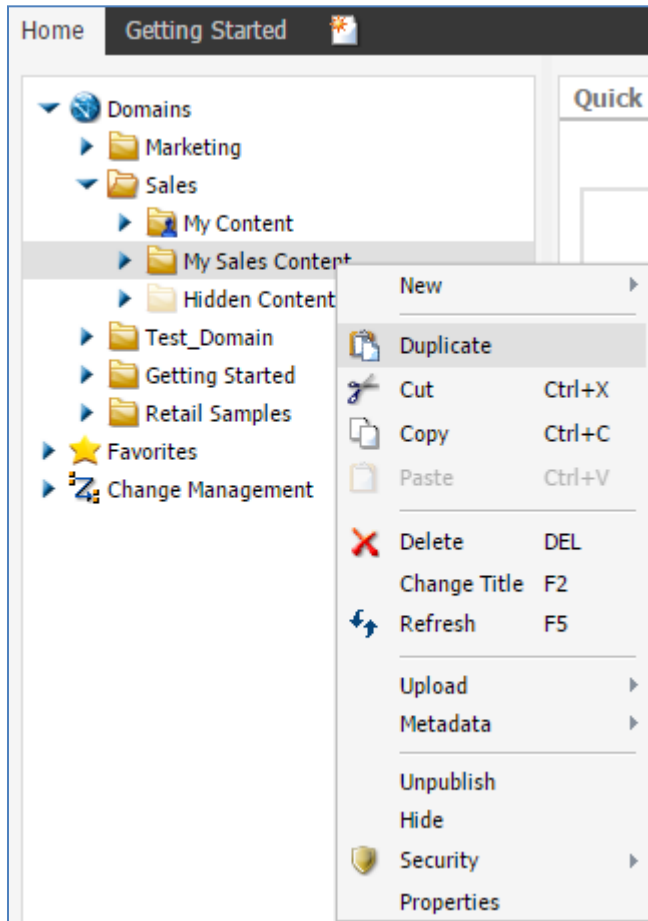


The following options are available when you right-click a folder that has been created within a domain:

New. Provides access to the following options:

- **Report.** Opens InfoAssist+, where you can create a report.
- **Chart.** Opens InfoAssist+, where you can create a chart.
- **Document.** Opens InfoAssist+, where you can create a document.
- **Visualization.** Opens InfoAssist+, where you can create a visualization.

- **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 for use with the ReportCaster distribution feature.
- **Folder.** Creates a new folder.



Duplicate. Makes a copy of the folder with an underscore and number appended to the title (for example, Sales_1).

Cut, Copy, and Paste. Cuts, copies, or pastes the folder and its contents.

Delete. Deletes the folder and its contents.

Change Title. Allows you to change the title of the selected folder.

Refresh. Refreshes the contents of the selected folder.

Upload. Enables you to upload a data file, document, or image.

Metadata. Enables you to create or edit a Synonym.

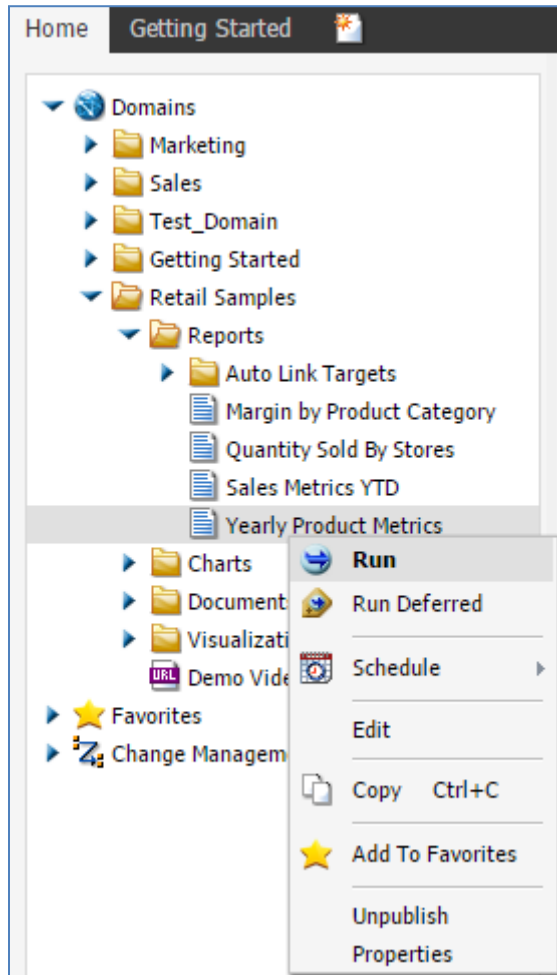
Publish/Unpublish. Allows or suppresses public access to the content.

Show/Hide. Shows or hides the item. The Hide option will hide the folder from everyone except the developer or manager.

Security. Provides access to the *Owner* option.

Properties. Shows the properties of the selected folder.

Like folders, content, such as report, chart, document, and visualization, have context menu options that include Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Security, and Properties.



Reports and charts also include the following right-click options:

- **Run.** Runs the report procedure or schedule.

- **Run Deferred.** Submits a report for deferred execution. This option is not available for visualizations.
- **Run With SQL Trace.** Runs a report and includes an SQL trace of the report results. This option is not available for visualizations.
- **Schedule.** Schedules a report procedure. Scheduling options include Email, Printer, and Repository. This option is not available for visualizations.
- **Edit.** Edits an item with the tool that was used to create it (for example, InfoAssist+).
- **Add to Favorites.** Adds the item to the Favorites folder.

Like folders, Schedules have context menu options that include Duplicate, Cut, Copy, Delete, Change Title, Security, and Properties.

Like content, Schedules have context menu options that include Edit and Run.

Schedules also include the following context menu option:

- **View Log.** Launches the Schedule Log Options dialog box from which you can select whether to view the most recent log report for the Schedule or specify a time range for which to obtain log reports.

Like folders, Distribution Lists have context menu options that include Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Security, and Properties.

Like content, Distribution Lists include the Edit context menu option, which invokes the Distribution List tools.

Like folders, URLs have context menu options that include Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Show/Hide, Share/Unshare, Share with, Security, and Properties.

Like content, URLs include the Edit, Add to Favorites, and Add to Mobile Favorites context menu options.

URLs also include the following context menu option:

- **View.** Enables you to launch the URL link.

Like folders, Excel Workbooks, PDF, and Image Files have context menu options that include Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Security, and Properties.

These files also include the following context menu option:

- **View.** Enables you to download a copy of the file to your browser, which will launch the File Download dialog box to allow you to open or save the file. If you choose open, the file will open in its corresponding application.

Favorites include the following context menu option:

- **Remove Favorite.** Removes the Favorite from the list.

You are now ready to move on to *Module 2, Lesson 4*, where you will learn how Change Management is used in WebFOCUS Business User Edition to import or export your content.