Information Builders

WebFOCUS

WebFOCUS Business User Edition Release Guide

Release 8.2 Version 02

December 19, 2017

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Chapter 1

WebFOCUS Business User Edition New Features

WebFOCUS Business User Edition (BUE) is intended for business users and analysts that want to generate and share reports, charts, documents, and visualizations. It is also intended for those who want to conduct data discovery to explore trends, patterns, and opportunities. It is a WebFOCUS business intelligence (BI) and analytics platform that enables reporting and analytic capabilities, which can be delivered to users inside and outside of your organization.

WebFOCUS Business User Edition is a self-service analytics solution for groups of business users and analysts. It is not only a web-based environment, but also a multi-user, server-based product designed with a user interface that is oriented toward non-technical users.

This topic describes the new features for WebFOCUS BUE Release 8.2 Version 02.

In this chapter:

WebFOCUS BUE 8.2.02 Key Features Summary

Use the table below for descriptions of the key features for WebFOCUS BUE Release 8.2 Version 02.

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Web Development

In Release 8.2 Version 02, you can use the new interactive Home page features, and WebFOCUS Designer for all your web development needs.

Creating Responsive Pages Using the WebFOCUS Designer

WebFOCUS Designer is a web-based development tool that you can use to create interactive, responsive pages and meaningful InfoApps, using content that you or other members of your organization create. This content (reports, charts, documents, and more) can be added to a page using drag-and-drop actions. Using the interactive grid canvas, you can resize and rearrange resources with ease. The enhanced filtering functionality enables you to drill down into your data further.

Working With the Home Page

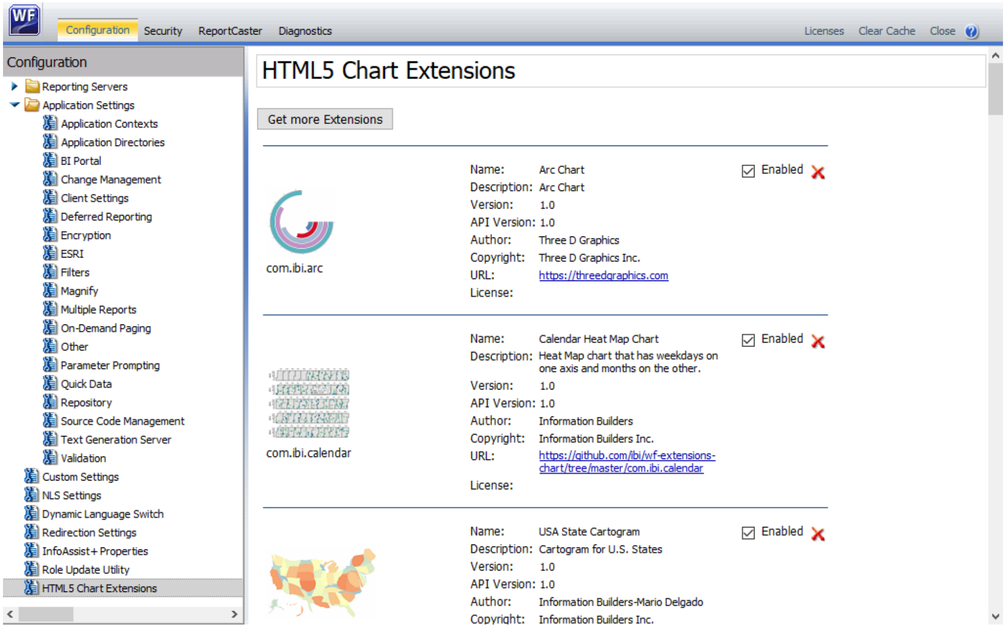
The new interactive Home page provides visual access to the tools, functions, properties, and features that WebFOCUS BUE offers. This modern, mobile-friendly design utilizes an innovative user interface and intuitive layout, so that you can quickly view, sort, and edit your resources on any device. Every detail of the new Home page has been created to provide maximum functionality with minimal distractions. It features one-touch content creation, a simplified Resources tree, search and filtering capabilities, alternating view of resources, and many other elements that enhance your WebFOCUS BUE experience.

Visualization and Analytics

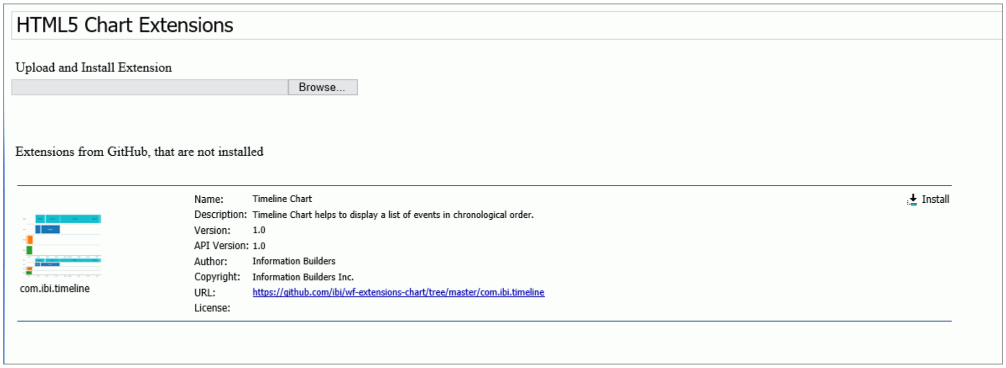
WebFOCUS BUE allows all users to easily conduct data preparation, visually analyze complex data sets, and quickly generate compelling data visualizations, dashboards, and reports that can be shared with other users.

Downloading Chart Plugins From the HTML5 Chart Extensions Page

The HTML5 Chart Extensions page contains all HTLM5 chart extensions currently available for use in your local installation of WebFOCUS BUE, as shown in the following image.



Features on this page enable administrators to make chart extensions available to InfoAssist+ developers for use in their chart customization and development, to remove them from InfoAssist+, and to uninstall them from WebFOCUS BUE when no longer needed. The *Get more extensions* link connects to the Upload and Install Extensions page where Administrators can install locally-created HTML5 chart extensions or to upload publically available and supported chart extensions from the Information Builders Github web site that are not currently installed, as shown in the following image.



These two pages free administrators from the tasks of manually searching through the IBI Github webpage and downloading the zip file of the correct version of the chart extension plug-in they want to use, or manually transferring locally-developed files from their source location to the *drive*:\ibi\WebFOCUS_BUE82\WebFOCUS\config\web_resource\extensions\ directory, editing the html5chart_extensions.json configuration file to include the new chart extension, and then running the *Clear Cache* command from the Administration Console to complete the activation of the chart extension.

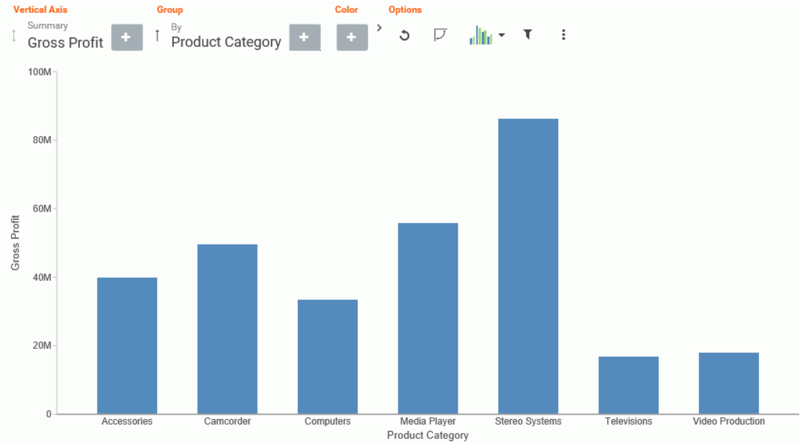
Using Insight to Analyze Dynamic Charts

Insight is a powerful visualization tool that allows for the interactive selection of measures and dimensions, enabling you to create dynamic charts in real time. This feature is available in Chart mode only.

Insight allows you to dynamically select fields, which makes it an ideal tool for comparing data values and reviewing scenarios. Depending on the data source, each group of measures and dimensions is presented in a list from which you can make a selection. Also, depending on your chart type, different buckets display, making it easy to quickly build your chart.

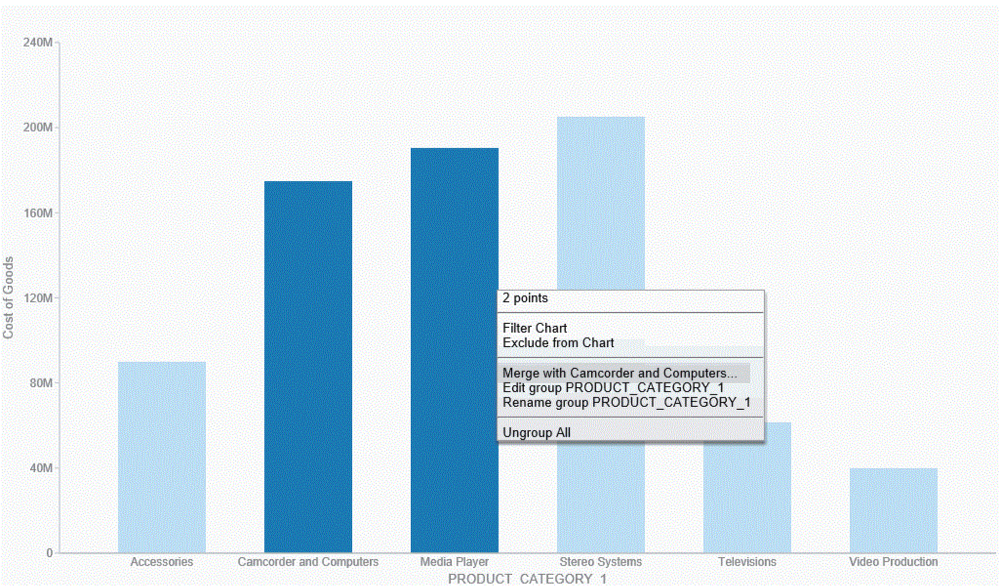
Insight gives you the tools you need to build dynamic charts that help you compare, contrast, and review scenarios to meet your needs. With intuitive options to make any necessary adjustments, you can quickly and easily develop effective charts that illustrate your data.

The layout of a simple Insight bar chart is shown in the following image.



Using Paper-Clipping to Group Dimension Values

Paper-clipping gives you the advantage of lassoing values in a visualization to create logical groups within your selected dimension. Paper-clipping uses the core functionality of dynamic grouping, giving you access to grouping capabilities that meet your business needs. You can also add additional groupings or fields to an existing group by merging the fields together, as shown in the following image.

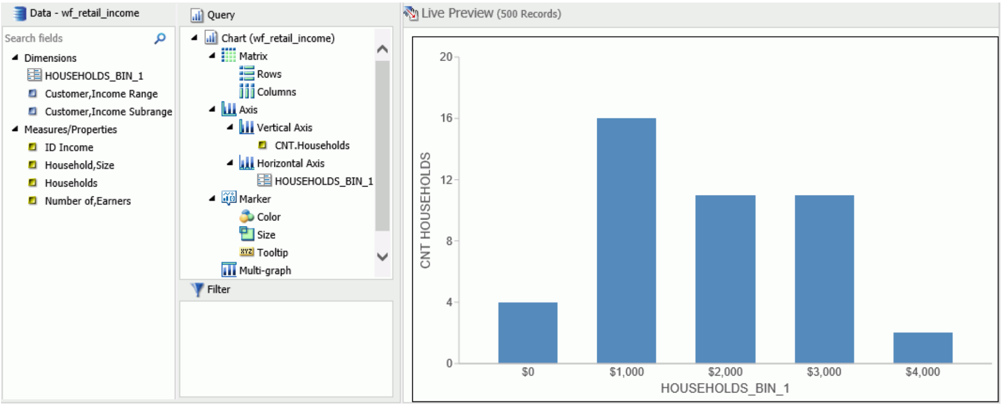


You can also rename the groups and values, giving you control over how the information displays.

Binning

Binning enables you to determine the frequency of values across a bin or grouping, as defined by a subset of values. With binning, you can create discrete buckets of continuous data that control how groups of your data display. In addition, binning gives you the ability to review trends and spot outliers.

For example, you can review the range of expenses incurred by households. In the following example, these ranges are represented by bins that are grouped by $1000. In this case, you can see that the largest number of households had the smallest expense (16) while the trend declines as the bin size gets larger. With binning, you can see the frequency of values across the different groupings, as shown in the following image.

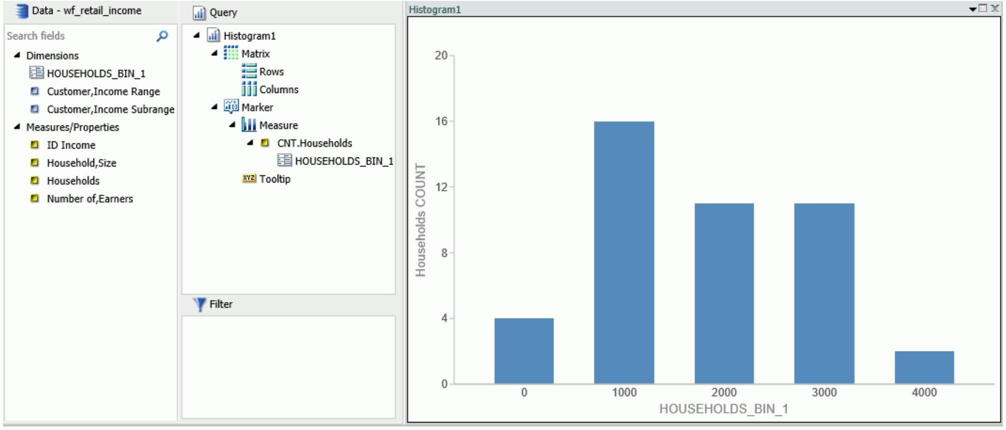


Binning Values in a Histogram

You can now create Histograms in Visualization mode. Histograms graphically represent the distribution of numeric data. They facilitate the identification and discovery of the underlying frequency distribution within a set of continuous data. You can use histograms to identify trends and illustrate categorizations, or groupings, also known as bins.

Binning is available in Chart and Visualization mode. Adding a measure to a histogram automatically creates bins with a default width of 10. This bin value is designated as a dimension field, since it is a limited field with a discrete set of possible values that was created from a field with an unlimited, continuous range of values. The measure displays as a count (.CNT) field and the related bin is created in the Query pane. You can right-click this bin field and click *Edit Bins* to change the value that dictates the width or format of the contents of the bin.

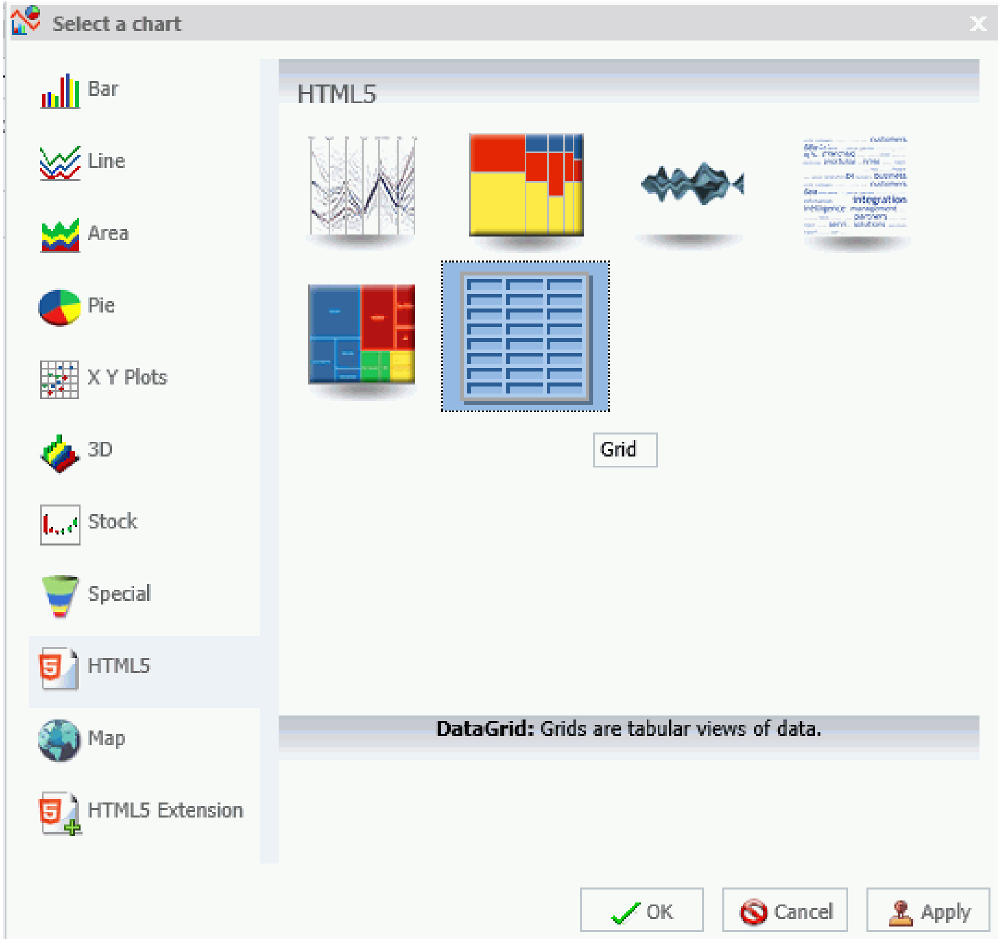
The bin automatically displays in the Query pane, as well as the under the Dimension group in the Data pane, as shown in the following image.



Grid Added as a New Chart Type

The ability to create a Grid chart type has been added. Accessible from the Other button on the Format tab in Chart mode, the Grid feature is part of the HTML5 group of charts.

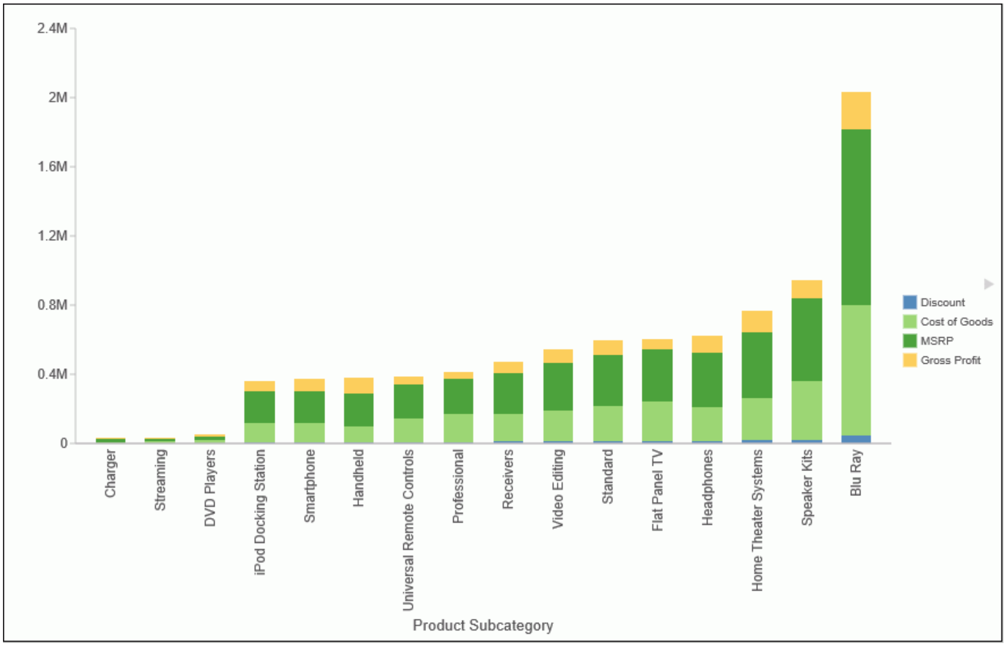
Grids allow you to display data in tabular format. As a new chart type, you can now display your data in a format that is similar to that of a typical report, as shown in the following image.



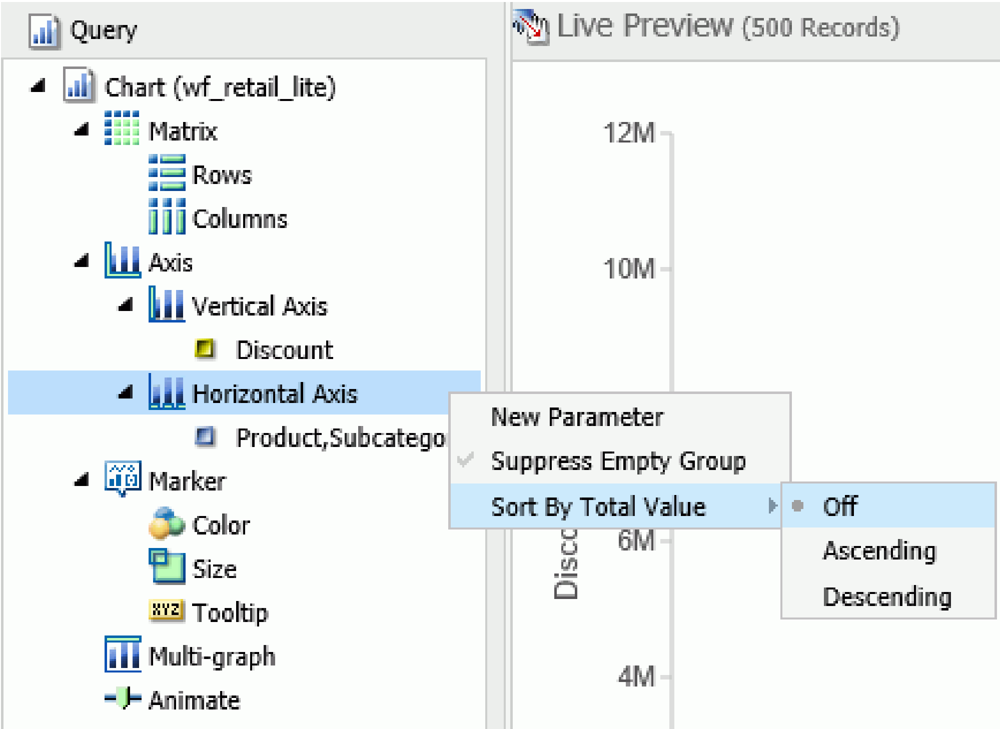
Note: Grids are also available in Visualization mode.

Sorting a Chart by Total Value

In Chart and Visualization mode, you can now sort your bar, line, and area charts by the total value. While this feature was implemented specifically for Stacked Bar charts, it also applies to other chart types. This feature enables you to view your data in numerical order, allowing you to identify trends and determine what data points are priorities. For example, the chart in the following image is set to *Ascending*, which sorts the chart from the lowest value to the highest value.



You can sort your charts in ascending or descending order using the Sort by Total Value option on the right-click menu of the Horizontal Axis, as shown in the following image.

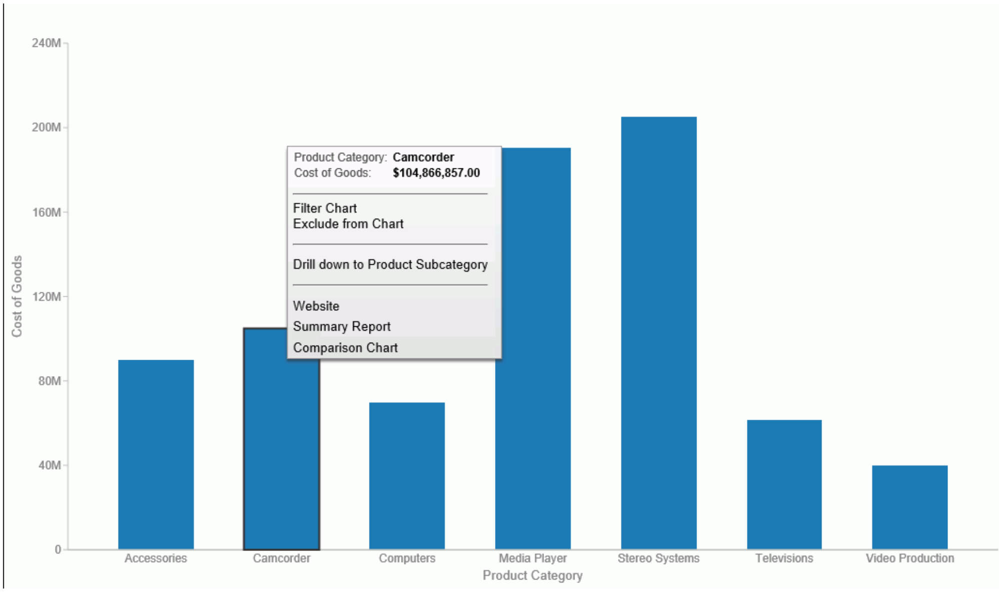


This option is turned off, by default.

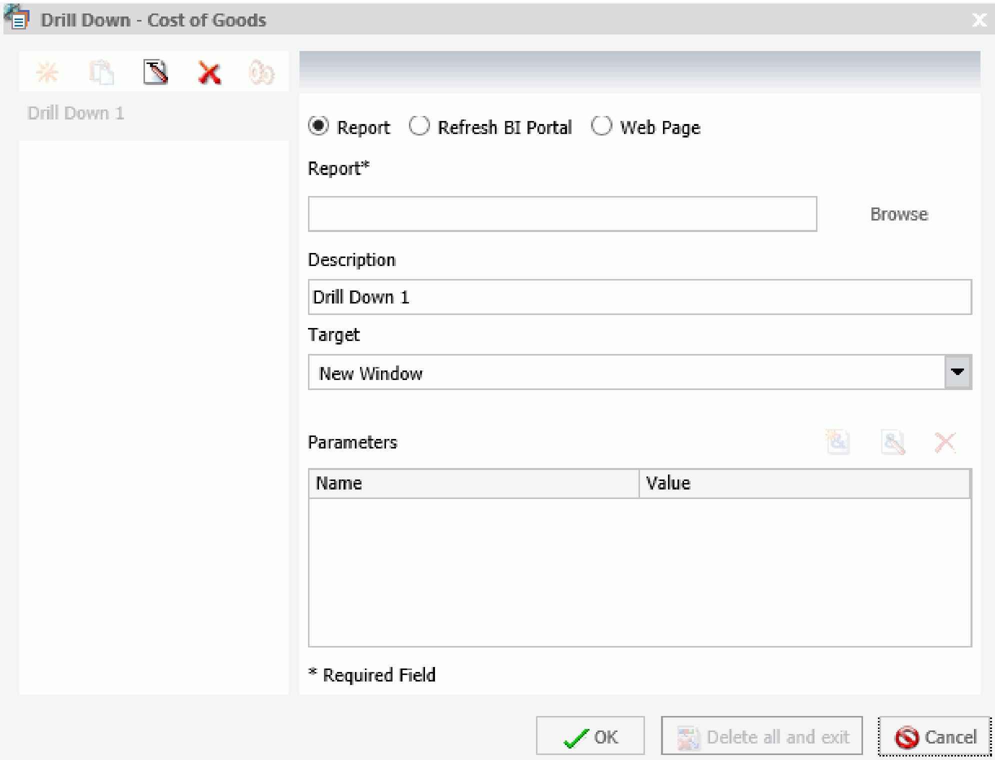
Note: If you rotate your chart horizontally, the Sort By Total Value menu option displays on the Vertical Axis.

Using Multi Drill in Visualization Mode

You can now create multiple drill down links on a measure field in a visualization. This enables you to define custom links to other reports or websites, making it easy to link content from internal and external sources. Once defined, these links display on the shortcut menu that displays when you hover over a riser, as shown in the following image.



You create multiple drill downs using the Drill Down dialog box, which you can access from the Links group on the Field tab. In the Query pane, click a measure to enable the Field tab. In the Links group, click *Drill Down*. The Drill Down dialog box displays, as shown in the following image.



Note: When creating a drill down in Visualization mode, the Auto Link Target option is not available.

Updates to Various Chart Types

The new chart attribute syntax has been applied to the following chart types: Dual Bar and Line, Tag Cloud, Streamgraph, Mekko, Funnel, and Pyramid. This process adds additional relevant field containers for these chart types, which can be used to specify fields in a specific area of the chart. For example, Horizontal Axis, Color, and Tooltip are field containers that are part of the new chart attribute syntax.

In InfoAssist+, specific field containers display for each chart type.

Percent Count Added as an Aggregation Option for Dimension (Non-Numeric) Fields

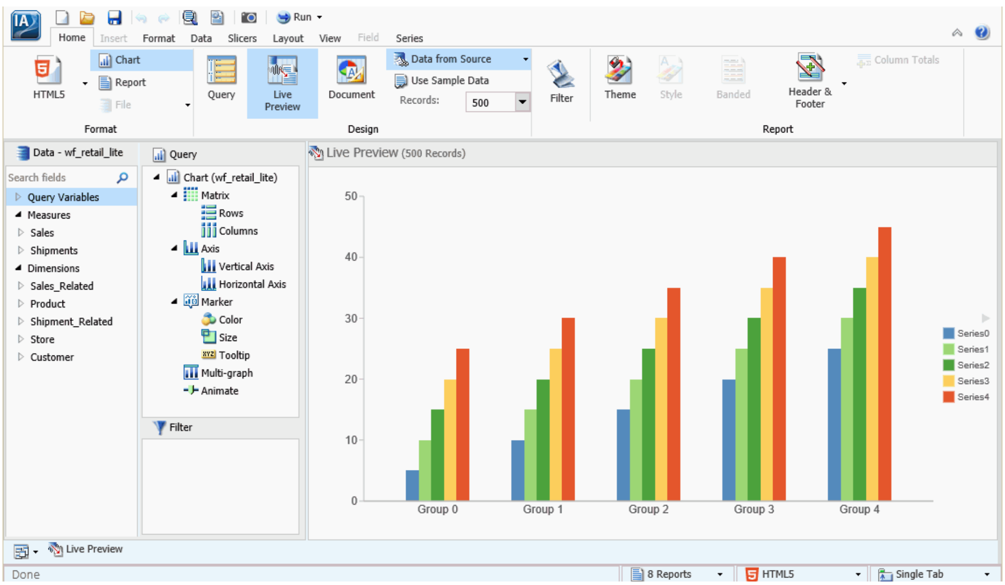
You can now use the Percent of Count aggregation on dimension (non-numeric) fields in a chart. This aggregation computes a field percentage, based on the number of instances found. In addition, you can use the Count or Count Distinct aggregation when working with dimension (non-numeric) fields. The Count aggregation counts the number of occurrences of a field. Count Distinct counts the number of distinct values within a field. When a dimension (non-numeric) field is placed in the Vertical Axis field container, it is converted to a Count field. You can subsequently change the aggregation to Count Distinct or Percent of Count.

You create multiple drill downs using the Drill Down dialog box, which you can access from the Links group on the Field tab. In the Query pane, click a measure to enable the Field tab. In the Links group, click *Drill Down*. The Drill Down dialog box displays.

Note: When creating a drill down in Visualization mode, the Auto Link Target option is not available.

New Default Theme (BIPNeutral) for InfoAssist+ and the Home Page

A new, modern theme that colors the interface has been introduced. Using light blue to show the default values, the theme uses different shades of this color, as shown in the following image.



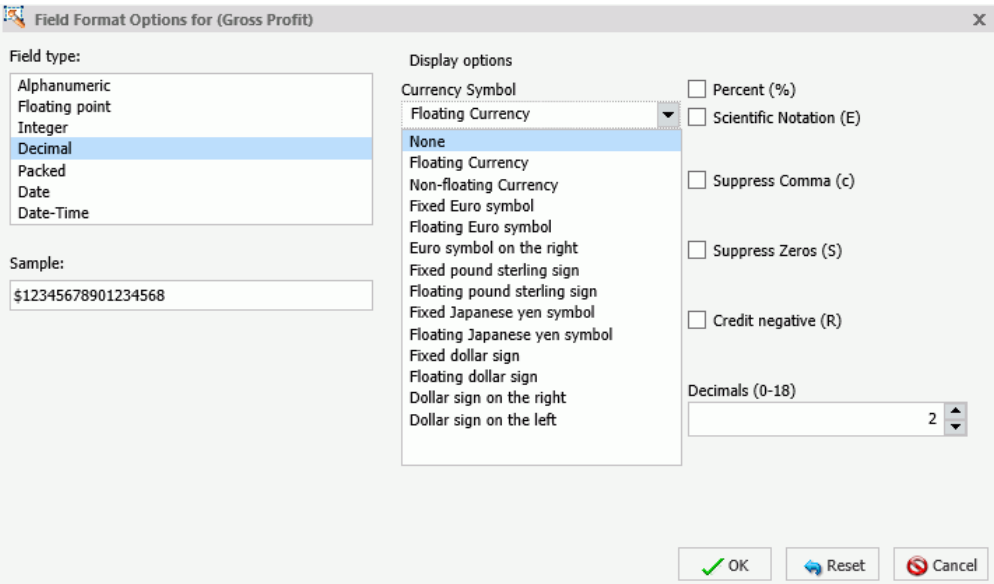
This theme is a contrast, based on previous gray-centric themes.

Some of the features of the theme include:

- On mouse over, the buttons in the ribbon and Quick Access Toolbar show with a light blue-gray background.
- Buttons with drop-down arrows display as blue on mouse over, but when you click a menu, the background opens with a white background, black text, and light blue hover color.
- All context menus show with white background, black text, and light blue hover color.

Extended Currency Options Added to Field Format Options Dialog Box

Additional currency options have been added to the Field Format Options dialog box. When editing the format of a field, you can select from a number of new currency symbols to enhance the format and display of your data. These new currency symbols are shown in the following image.

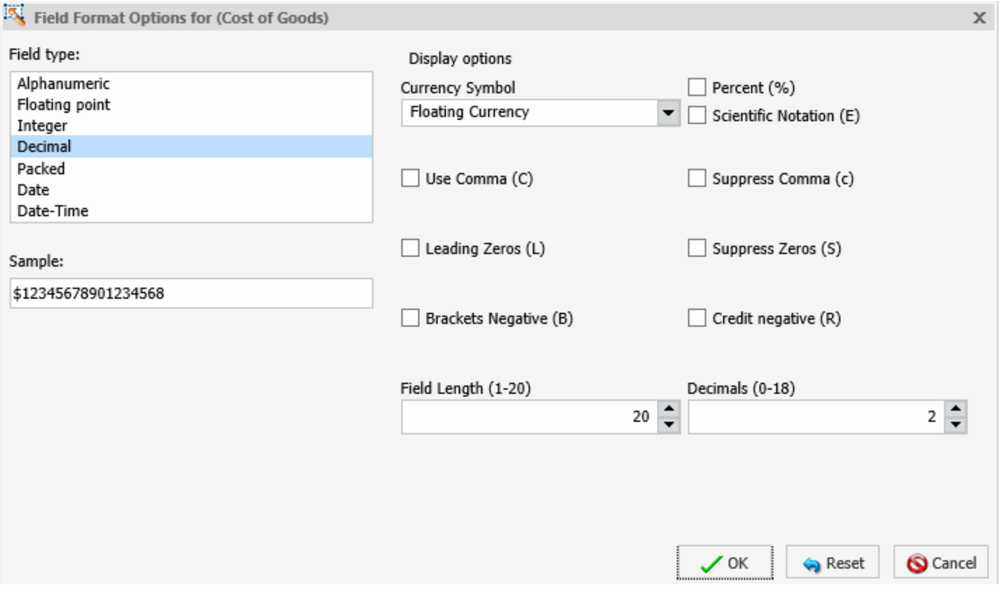


You can access the Field Format Options dialog box from the following locations:

- Define and Compute dialog boxes.
- Edit Format option when you right-click a measure in the Query pane (all modes), right-click a column in a chart, or a measure column in a report.
- Format group on the Field tab.

Editing the Format of a Field in Chart and Visualization Mode

Similar to Report mode, you can now edit the format of a measure field in Chart and Visualization mode. This feature allows you to access the Field Format Options dialog box, where you can modify the Field type (for example, Decimal or Alphanumeric) and change Display options (for example, Currency symbol or Percent). You can also set options for Field Length and specify the number of decimals to apply to the values in the selected measure, as shown in the following image.



You can access the Edit Format option from the menu that displays when you right-click a measure field in the Query pane. In addition, you can access the Field Format Options dialog box by selecting *More options...* from the Decimal drop-down menu in the Format group on the Field tab.

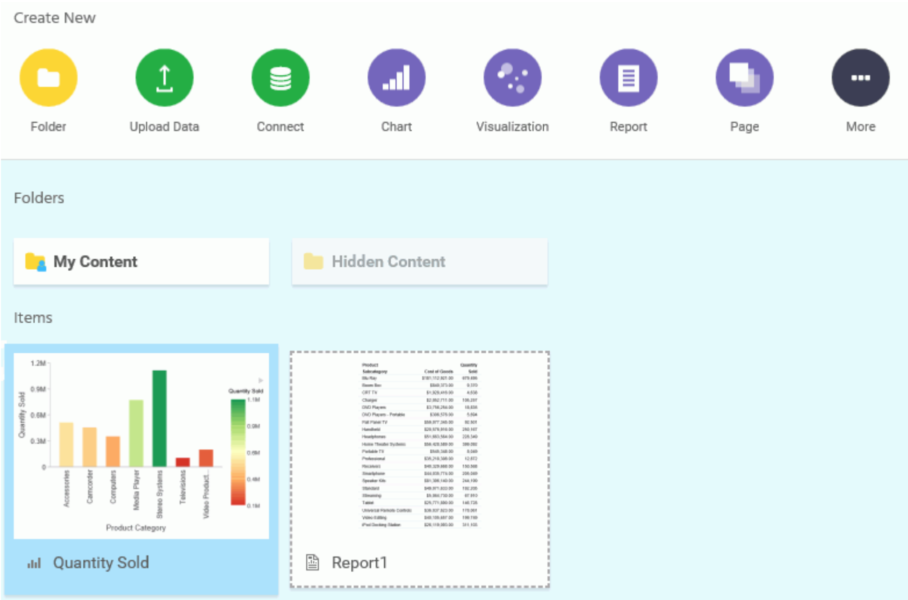
Reporting

Use the reporting capabilities found in WebFOCUS BUE to add custom functionality and output formats to reports.

Creating Thumbnails From Content

You can create and store thumbnail images for use in the Home page. Thumbnail images allow you to see a snapshot of a report or chart without opening the file. You can create a thumbnail image by clicking on the Create Thumbnail icon, which is located on the Quick Access toolbar.

You can create thumbnail images when working in Report and Chart mode. These images are smaller renditions (220x160px) of your actual report or chart as it displays in Live Preview. Once you create the thumbnail and save the report or chart, you can access the thumbnail image from the file list on the Home page, as shown in the following image.



Note: Thumbnail images are stored as part of the procedure when it is saved in the repository.

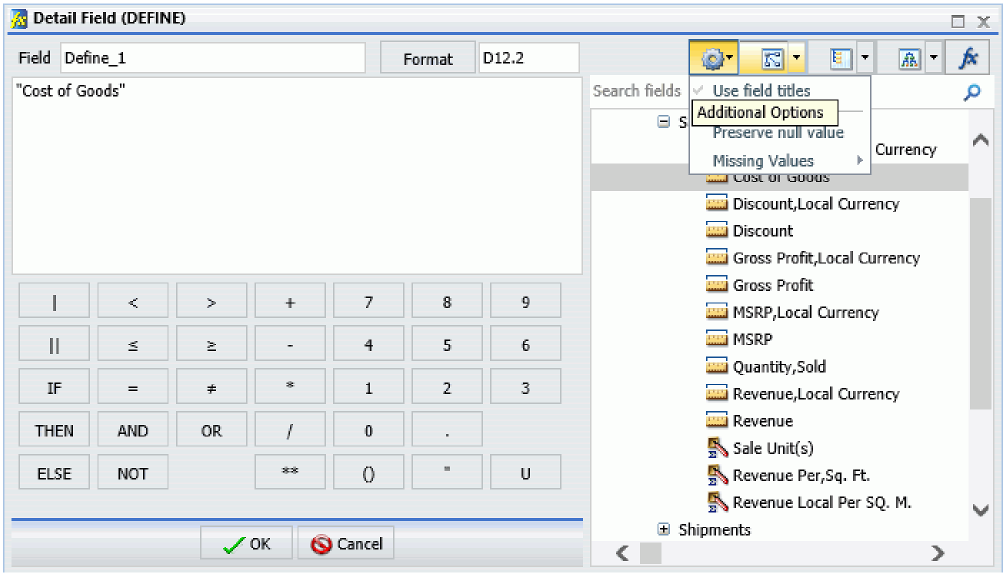
Using Field Titles in a Define or Compute

When working with Defines and Computes, field titles now automatically display as you build your criteria in the Define (or Compute) text area.

Field titles are an attribute of a field. They are defined in the metadata and display only when specified for the field that you select. If a field title has not been defined in the metadata, the title that displays will be the physical field name.

Note: If you specify a field with a duplicate field title, the fully qualified field name is used for the second (and any subsequent) instance.

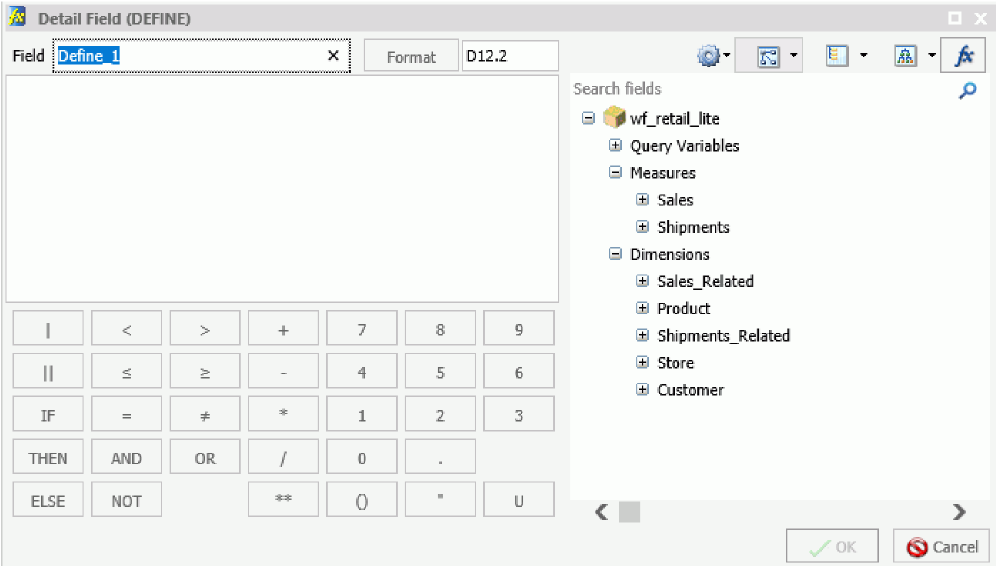
The Use field titles feature enables you to see the field title (for example, Cost of Goods) rather than the fully qualified name of the field (for example, WF_RETAIL_LITE.WF_RETAIL_SALES.COGS_US). This facilitates easy identification of field names while building your Define or Compute. You can switch between the display of field titles and fully qualified field names by unchecking the Use field titles option, which you can access by clicking *Additional Options*, as shown in the following image.



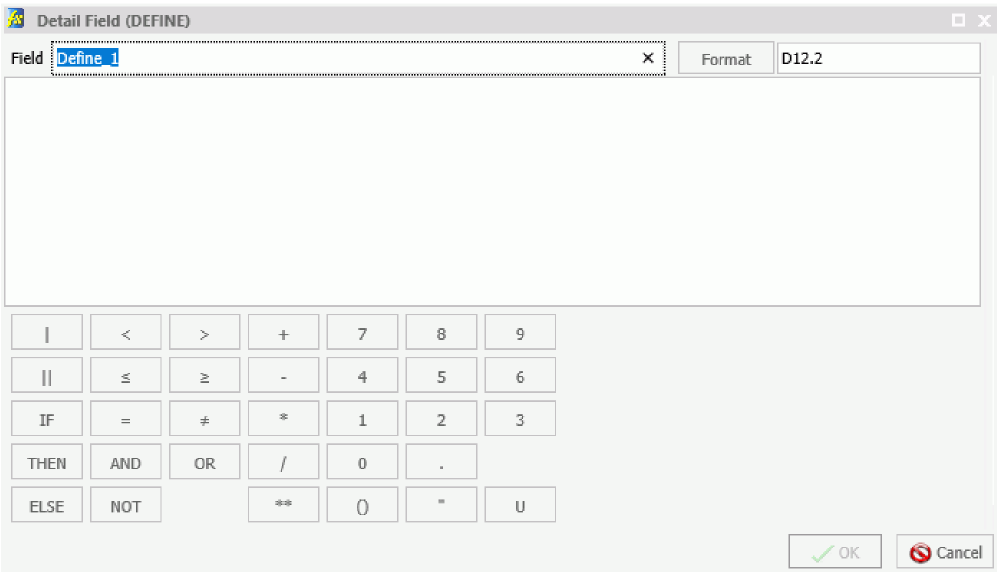
Resizing the Text Area of a Define or Compute

When working with Defines and Computes, you can now adjust the width of the text area to accommodate the size of the fields in your query. This is particularly useful when using fully qualified names or long formulas. Using your mouse, hover over the right border of the text area. When the double arrows display, click and drag the text area to the right to expand it.

In its original state, the text area is aligned with the calculator, as shown in the following image.



When fully expanded, the span of the text area replaces the entire metadata tree, as well as the toolbar icons that display, as shown in the following image.



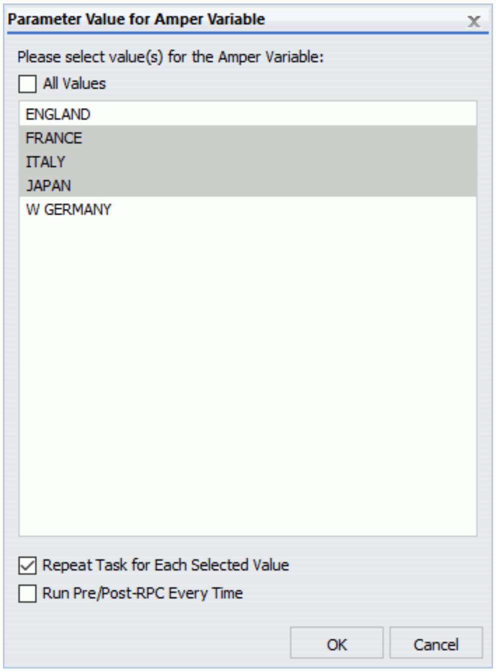
Scheduling

ReportCaster is a scheduling and distribution application that centralizes the execution and distribution of reports, the contents of URLs, and files.

Using Parameter Values to Burst Active Dashboards and Compound Reports

In addition to the ability to distribute sections of a single report to individual users using standard bursting, you can now use a parameterized filter to distribute sections of reports. This new feature allows you to burst reports that originally could not be burst, including active dashboards and Compound Reports in Excel format.

When scheduling a report that contains a filter with a static or dynamic multiselect parameter, access the Parameter options and select values from the multiselect parameter that you want to include in the distributed report or reports, using the Parameter Value for Amper Variable dialog box. In this dialog box, the Repeat Task for Each Selected Value check box displays, as shown in the following image.



Enabling and Disabling Schedules Using the Right-Click Menu Option

You can now enable or disable schedules by right-clicking a schedule on the Home page. This method provides a faster option for changing the activation of schedules than using the Enable check box in the scheduling tool.

To use this option, right-click an enabled schedule and click *Disable*. If the schedule is already disabled, the menu option appears as *Enable*.

Tracking ReportCaster Configuration Events

You can now track when ReportCaster Configuration settings are changed. This feature enables you to keep continuous records of how and when ReportCaster Configuration settings are changed, and to comply with any regulatory auditing requirements of your organization. To access the audit log file, launch the Administration Console, click the Diagnostics tab, and then click *Log Files*.

Email Distribution Using the Cc and Bcc Email Options

You can now use the carbon copy and blind carbon copy email options for schedules that are configured to use email distribution. These options allow you to send copies of an email distribution to separate recipients, simplifying the creation of scheduled email distributions. If you use the Blind Carbon Copy field to send email distributions to individual recipients, each recipient will not see the other recipients of the email distribution.

Restricting User Input of Email Addresses and Domains

You can restrict user input of email addresses and domains to those listed in the Allowed Email Domains and Addresses dialog box. Enabling this feature allows users to easily select email addresses and domains only from a pre-approved list, removing the need to add addresses manually.

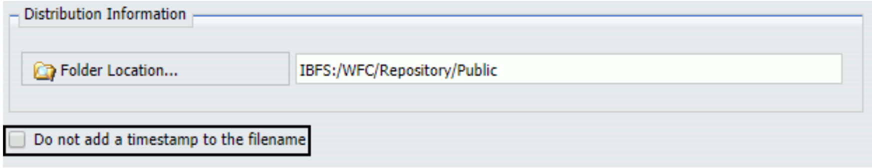
To access the Allowed Email Domains and Address dialog box, navigate to the ReportCaster Console, click the *Configuration Tab*, click the *Email Distribution* folder, and then click the *Allowed Email Domains and Addresses* folder.

To activate this feature, select the *Enabled* check box, and then select the *Restrict user input with this list* check box.

Overwriting Reports Distributed to the Repository

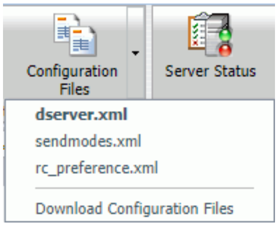
You can now overwrite a single report after each scheduled distribution. Instead of generating multiple timestamped files after each scheduled distribution, this feature provides the option to remove timestamps from the filename of reports distributed to the Repository or your file system.

To use this feature, create a schedule that uses Repository distribution. When setting distribution information in the Distribution tab, select the *Do not add a timestamp to the filename check box*, as shown in the following image.



Viewing and Downloading Configuration Files

You can now use the Configuration Files button to view and download configuration files from the ReportCaster Console. The Configuration Files button is shown in the following image.

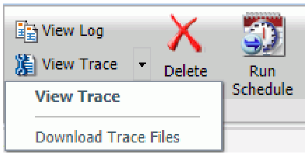


Downloading ReportCaster Job Log Trace Files

In addition to opening and viewing trace files in your browser, you can now download trace files created by ReportCaster jobs. This feature allows you to download trace files of any size, as a zip file.

To access this feature, navigate to the ReportCaster Console, and click the *Job Log* tab. Choose a folder in the left panel and click an existing job log generated from a job that has been configured to contain traces.

Navigate to the Manage Job Logs group on the ReportCaster Console ribbon and click the *View Trace* drop down . The *Download Trace Files* option appears, as shown in the following image.



Click *Download Trace Files* to download the trace files as a zip file.

Chapter 2

WebFOCUS Business User Edition Release Notes

This topic describes the Release Notes for WebFOCUS BUE Release 8.2 Version 02.

In this chapter:

InfoAssist+

The following are release notes for InfoAssist+.

- If you are adding parameters for data selection at run time, the Rename Variable option has been changed to Parameter Prompt.

- When working with charts in Insight, the label on the some of the filters has been changed from Nothing selected to All.

- When working with filtering, you can now change the scope of a parameter amper variable from local to a global scope. This makes its value available across multiple components on a page or in a document. To transform the parameter to have global scope, enter a single amper (&) symbol in the first character position of the parameter name field. Note that this symbol can only be entered in the first position of the parameter name where it defines the parameter scope. Parameter field names cannot contain a & symbol in any other character position.

- Enhancements have been made so that when changing a field format, the correct currency symbol is applied. Charts work with floating currency symbols to allow the placement of the currency symbol to work within the different elements of the chart. In a chart, any fixed currency designations will automatically be presented with a floating currency symbol. Floating and fixed currency formats are supported for Reports only.

  When working with charts, the axis label formats are defined separately from the field format. To set the format of the axis label, use the option in the *Labels* group on the *Format* tab. Click *Axes*, point to *Vertical Axis*, and click *More Vertical Axis Options*. In the Format Vertical Axis dialog box, click *Labels*, open the Format Labels drop-down menu, and select a currency format.

- When importing data for use in InfoAssist+, numeric data values can be imported into the available filter values from a flat file or a CSV as pure numbers. This import supports numbers containing leading signs (negative), numeric digits, and decimal points. Numbers containing currency symbols or commas will be imported, but as shown in the Values box in the Create a filtering condition dialog box, may not be interpreted correctly. Text or CSV files with values requiring complex formatting can be opened and saved with the appropriate formatting in Excel. This Excel file can then be imported with the formatting retained.

Report Styling

The lowercase p display option, which converts a number to a percent by multiplying it by 100 and displays the number followed by a percent symbol, is not supported for output formats XLSX and EXL2K.

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