TIBCO WebFOCUS®

Business Intelligence Portal

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Contents

Introducing TIBCO WebFOCUS® and Business Intelligence Portals

This topic introduces WebFOCUS® and the Business Intelligence (BI) Portal.

In this chapter:

❏ Introducing TIBCO WebFOCUS and Business Intelligence Portals

❏ Signing in to TIBCO WebFOCUS

❏ Legacy Home Page

❏ Publishing Content

Introducing TIBCO WebFOCUS and Business Intelligence Portals

WebFOCUS is a comprehensive BI platform, helping organizations deliver information and analytics to the widest range of users. It delivers many rich new capabilities and integrates the four critical elements for smarter decision-making: business intelligence, performance management, advanced analytics, and data integrity.

The WebFOCUS Business Intelligence (BI) Portal is an analytical content management and deployment system that provides a flexible environment for users to access BI content, including visualizations, reports, charts, maps, and interactive InfoApps. There are two types of portals that you can create in WebFOCUS, basic and collaborative. The basic portal is a true self-service environment. It offers a full suite of web development tools, similar to those used to create popular consumer applications. It combines the best of web development with powerful user customization capabilities, delivering a rich, interactive BI experience to any user, anywhere. You can create or access an existing basic portal from the Portals node on the Legacy Home Page in the Resources tree.

The collaborative portal has the same capabilities as the basic portal, plus it includes several collaborative features that allow rearranging, reusing, and sharing content and pages between users more easily. Additionally, developers and users of the collaborative portal can view, post, edit, and manage comments. Comments are available on several content levels, including pages and panels. There are also several usability enhancements that the collaborative portal offers, such as pre-configured responsive page templates, Page Designer, as well as aliasing and embedding capabilities. Collaborative portals are created within domains in the WebFOCUS repository. You can create these from Legacy Home Page and the WebFOCUS Home Page. The collaborative portal feature includes the Retail Samples domain, which you can use to test various procedures before implementing them with your real-life content.

The ability to create basic and collaborative portals is controlled in the WebFOCUS Administration Console. By default, both basic and collaborative portals are enabled, and can coexist in the same environment, adding a new level of flexibility to the content management. Whichever portal type you select, you can adapt it to your needs. Both portals use the same familiar ribbon interface found in WebFOCUS InfoAssist and building a basic or collaborative portal is just a matter of a few clicks and drag-and-drop actions.

The following image shows an example of a basic portal.
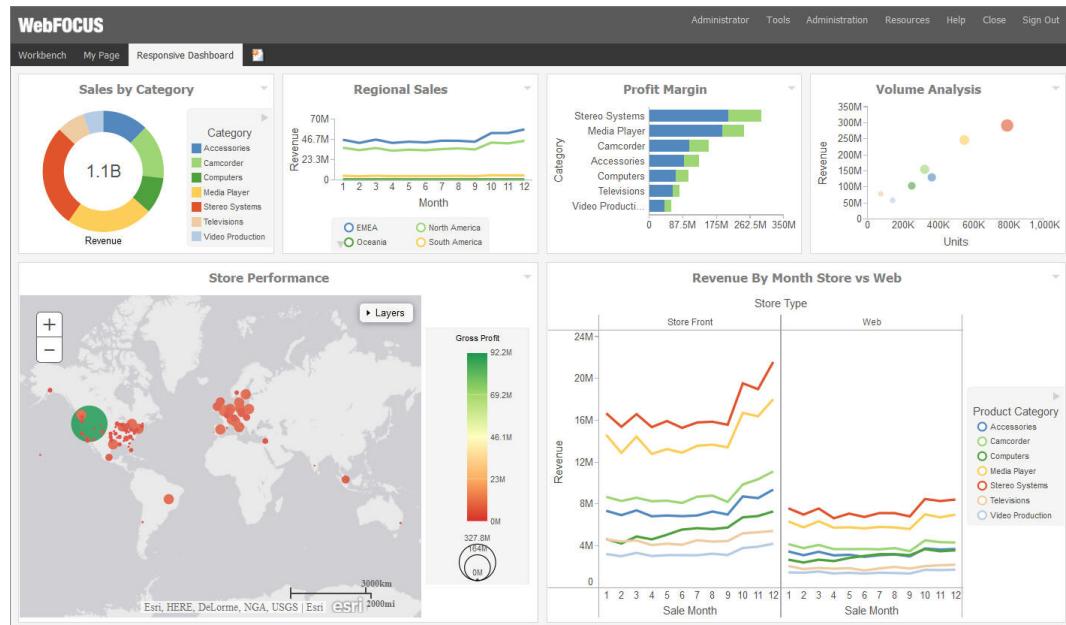
Signing in to TIBCO WebFOCUS

You can launch WebFOCUS from any web browser, using the address created during the installation. The sign-in page and default home page may be different depending on the configuration requirements of your organization.

To learn more about the installation process, see the *TIBCO WebFOCUS® Installation and Configuration* manual.

Procedure: **How to Launch WebFOCUS**

1. In your browser, go to the following page:

   `http://hostname:port/ibi_apps`

where:

hostname:port

Are the host name and HTTP port of the web server or application server.

The default WebFOCUS Sign In page opens, as shown in the following image.
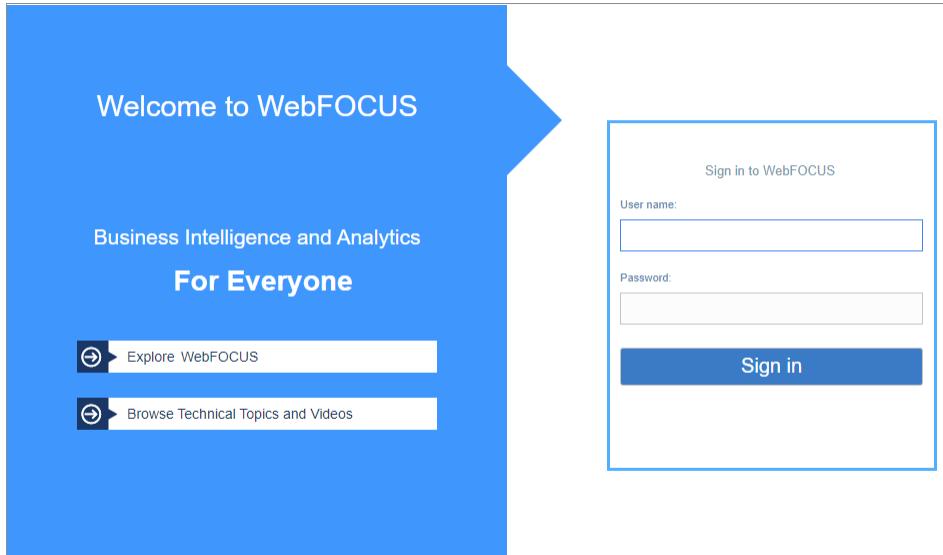
2. Type your user name and password. For example, if you are an administrator, you can type admin/admin.

3. Click *Sign In*.

The home page loads and shows all the content that you are authorized to see.

Note: You can also reconfigure WebFOCUS to run the Legacy Home Page or a custom welcome page after sign-in. This behavior is configured by setting the *Redirect /ibi_apps to* setting on the BI Portal page, in the Administration Console.

Legacy Home Page

The home page, shown in the following image, is the first page that you see when you sign in to WebFOCUS, if you have the Legacy Home Page enabled, by default.

The Legacy Home page has two sections that you can interact with:

❏ Menu Bar

❏ Resources Tree

The content in both the Menu Bar and the Resources tree varies, depending on whether or not you are signed in and the user type.

Menu Bar

The Menu Bar is located in the upper-right section of the screen, inside the Top Banner. The following image shows the Menu Bar that appears when you are signed in to WebFOCUS, as an administrator.

The Menu Bar allows you to perform a variety of activities, depending on your user type.

When You Are Signed Out

❏ Enable accessibility. (Turn on a screen reader. This is available only in Internet Explorer®.)

❏ Get help.

❏ Sign in.

When You Are Signed In (You can access additional options, as well as all the options that you see when signed out.)

❏ Administrator:

   ❏ Change your password (click on your name).

❏ Administration:

   ❏ Access the Security Center, where you define users and groups and grant access permissions.

   ❏ Access the Administration Console, where you configure, administer, and monitor the components of the WebFOCUS application.

   ❏ Access the Magnify Console, where you specify settings, configure security, and perform maintenance and diagnostic tasks for Magnify.

   ❏ View and administer the private resources for groups and users.

   ❏ Switch between Normal mode (seeing your own content) and Manager mode (managing other user content).

❏ Tools:

   ❏ View the status of deferred reports, and manage them.

   ❏ Stop your outstanding interactive requests that are running.

   ❏ Access the ReportCaster Explorer, where you view ReportCaster content within columns that provide detailed information specific to the displayed ReportCaster item (Schedules, Distribution Lists, Library Access Lists, Library Reports, Watch List Reports).

   ❏ Access the ReportCaster Status, where you view the status of your scheduled jobs and log reports. Authorized users can also view the status of the ReportCaster Distribution Server and perform configuration and administration tasks.

❏ Access the Magnify Search Page.

❏ Access the online Help.

❏ Sign out.

Resources Tree

The Resources tree, located on the left side of the page, contains your WebFOCUS Resources, such as workspaces and Portals. The following image shows the Resources tree that appears when you are accessing the Legacy Home Page.
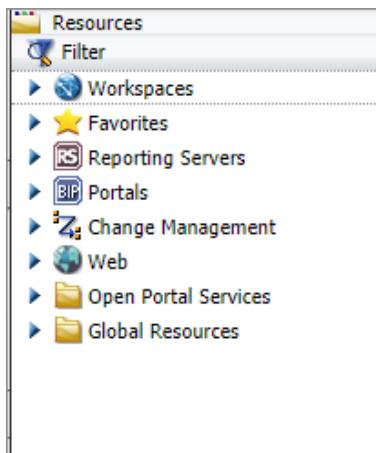
The resources differ for every user. For example, the public user sees only public content.

You may want to create reports using WebFOCUS InfoAssist, or run existing reports before building or accessing a portal.

In addition to a simple Filter dialog box, the Resources tree contains the following nodes:

❏ **Workspaces.** Lists the workspaces folders that you have created on the portal. Yellow folders are published folders. Gray folders are unpublished.

❏ **Favorites.** Lists the items that you have designated as Favorites. To designate an item as a Favorite, right-click the item, and on the shortcut menu that opens, select *Add to Favorites.*

❏ **Reporting Servers.** Lists the servers that you can access.

❏ **Portals.** Lists all the portals that you have created. Portals with a blue icon are published. Portals with a gray icon are unpublished.

❏ **Change Management.** Lists the Import and Export facilities.

  ❏ **Import.** Enables an administrator to move a change package into an acceptance test.

  ❏ **Export.** Enables a developer to move changes made to application files to the user acceptance test environment.

❏ **Web.** Lists your application folders.

Global Resources Folder

Administrators have access to a Global Resources folder on the Workspaces level in the Resources tree. The Global Resources folder contains files that are used to style and format your content in WebFOCUS Designer and Portal Page Designer. The Global Resources folder is shown in the following image.
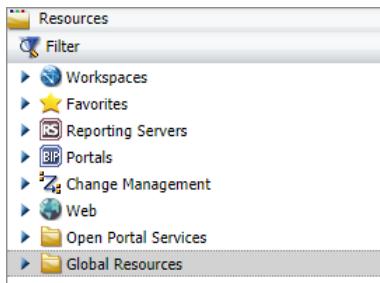
Global Resources Subfolders

The Global Resources folder contains three main subfolders: Page Templates, Page Templates (Legacy), and Themes. These main subfolders as shown in the following image.

Each main subfolder contains two additional subfolders: Standard and Custom. These subfolders are shown in the following image.
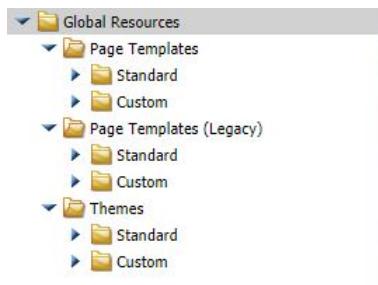
Right-Click Options

The Global Resources folder provides the right-click option Refresh, as shown in the following image.
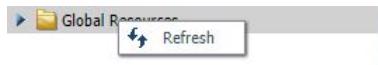
All Global Resources main subfolders provide the following shortcut menu options: Refresh, Search, Security, and Properties. These menu options are shown in the following image.
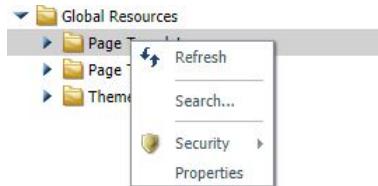
All Global Resources Standard subfolders provide the following shortcut menu options: Refresh, Security, and Properties. These menu options are shown in the following image.
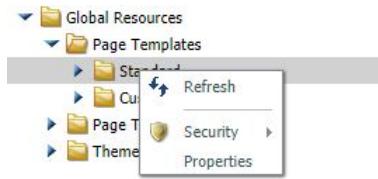
All Global Resources Custom subfolders provide the following shortcut menu options: New, Paste, Refresh, Security, and Properties. These menu options are shown in the following image.
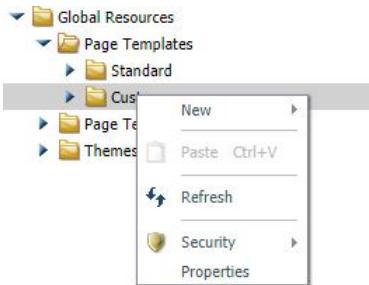
The Page Templates Custom Subfolder provides the following New shortcut menu options: Page, Folder. These menu options are shown in the following image.
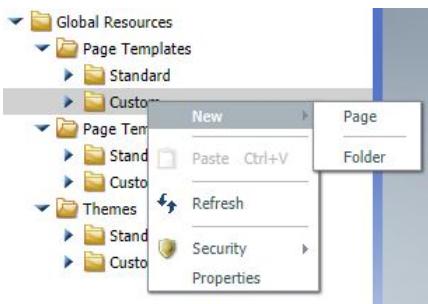
The Page Templates (Legacy) Custom Subfolder provides the following New shortcut menu options: Portal Page, Folder. These menu options are shown in the following image.
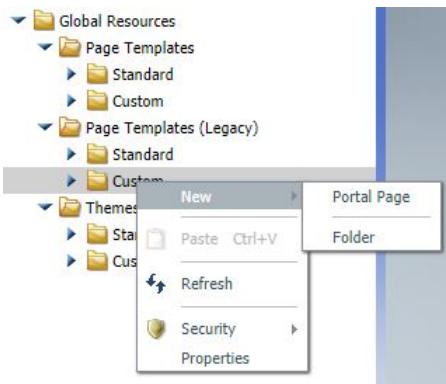
The Themes Custom Subfolder provides the following New shortcut menu options: Text Editor, Folder. These menu options are shown in the following image.
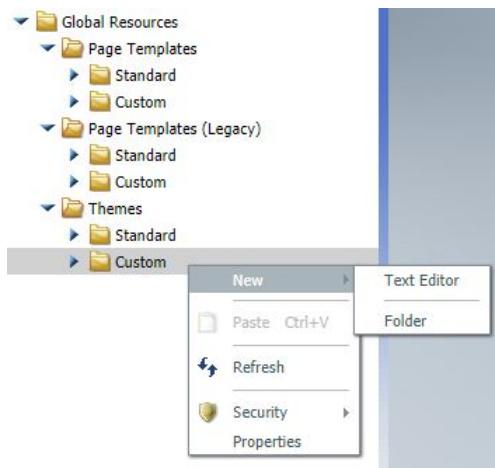
From the shortcut menu, select *Security* to display Security options: Rules, Rules on this resource, Effective policy. Security options are shown in the following image.
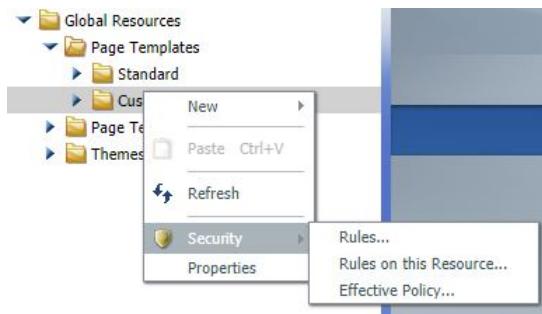
Node Shortcut Menu Options

Each node in the Resources tree has a shortcut menu. The options are:

❑ **View.** This option is only available for the Workspaces node. The options are:

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

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

   ❑ **Repository View.** The default view.

   ❑ **Full View.** Lists the servers as folders. Open a folder to list the databases contained on the server.

❏ **New.** The options are:

   ❏ **Enterprise Workspace.** Opens a New Enterprise Workspace dialog box, where you can create an enterprise workspace and optionally add a portal or reporting server application.

   ❏ **Tenant Workspace.** Opens a New Tenant Workspace dialog box, where you can create a tenant workspace and optionally add a portal or reporting server application.

   ❏ **Folder.** Creates a new folder.

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

❏ **Paste.** Pastes the item under the applicable node. This option is only available for the Domains node.

❏ **Search.** Opens the Search dialog box, where you can define a search query. This option is only available for the Domains node.

❏ **Security.** The options are:

   ❏ **Rules.** Opens the Security Rules dialog box, where you set up simple and advanced security rules for groups and users.

   ❏ **Rules on this Resource.** Opens the Rules on this Resource dialog box, where you can view and run reports on the security rules defined for the repository.

   ❏ **Effective Policy.** Opens the Effective Policy dialog box, where you can view the effective policy by privilege and user.

❏ **ReportCaster Explorer.** Accesses the ReportCaster Explorer, where you view ReportCaster content. This option is only available for the Domains node.

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

❏ **New Portal.** Creates a new portal. This option is only available for the Portal node.

For more information on shortcut menus for folders and items in the tree, see *Types of Content in the Resources Tree*

Publishing Content

When you create a new item or folder, it is private. Only you can see it, run it, edit it, and so on. A private item is illustrated with a gray icon.

When you are ready to allow others to access an item that you created, you can publish it. This turns on any rules set on the item itself, or those that may be inherited from a higher level. The icon of the item appears in full color to indicate that the item is published.

In WebFOCUS, administrators and developers have the ability to publish items for other users. Once an item is published, it becomes visible to all users.

Procedure: **How to Publish an Item**

1. Sign in as an administrator or developer.

2. On the Legacy Home Page, in the Resources tree, right-click an item, and then click *Publish*.

   The item is now visible to all users.

   Note: When you publish a folder, all items inside this folder, including other folders, are published automatically.

Procedure: **How to Unpublish an Item**

1. Sign in as an administrator or developer.

2. On the Legacy Home Page, in the Resources tree, right-click an item, and then click *Unpublish*.

   The item is now private and only visible to you.

   Note: When you unpublish a folder, all items inside this folder, including other folders, are unpublished automatically.

Chapter 2

Workspace Content in the Resources Tree

The Workspaces node is the highest level of folder organization in the Resources tree. All of the workspaces that a user is authorized to access are displayed in the tree by default. Workspaces contain all of the components that you can create with WebFOCUS. This topic describes the contents of the Workspaces node, types of content in the tree, and their properties that are available when you access WebFOCUS from the Legacy Home Page.

In this chapter:

❏ Selecting a Workspace

❏ Types of Content in the Resources Tree

❏ Filtering Content in the Resources Tree

❏ Searching Workspace Content in the Resources Tree

❏ Creating Shortcuts

❏ Creating URLs

❏ Creating Blogs

❏ Using Favorites

❏ Sharing Content in TIBCO WebFOCUS

❏ Using the Mobile Viewer to Access Content

Selecting a Workspace

A list of the workspace folders, populated from the TIBCO WebFOCUS Repository, appear in a tree structure. When the contents of a tree change, such as when you create and save a new report or a report is published, the tree is automatically refreshed. You can also use the Refresh option from the shortcut menu to update the tree contents.

Types of Content in the Resources Tree

A workspace can contain a wide range of items, including report procedures (FEX), Reporting Objects (special type of report procedure), Alert procedures, documents, and Internet hyperlinks. It can also include ReportCaster items if you are licensed for ReportCaster. For more information, see the *TIBCO WebFOCUS® ReportCaster Guide*.

These items are located in folders. Both the items and the containing folder may be private, published, or shared. If you have migrated from an earlier release of WebFOCUS, you will have the Standards Reports, Reporting Objects, and Other Files folders. If you were permitted to create your own reports, you will have the My Content folder, which was the My Reports folder in prior releases. My Content may contain the Custom Reports, Shared Reports, and folders for each My Report report you created.

❏ **Published content** is considered authoritative and has usually undergone quality assurance and testing before being published for the user community. User access to published content is controlled by rules.

❏ **Private content** can be in the following forms:

 ❏ **My Content.** The reports, output, and schedules created by a user. This content remains private to a user unless the user chooses to share it with others or unless an administrative user has the ability to manage private content for that user. To share a resource, right-click the item and then click *Share*.

 Note: Shared resources appear in a Shared Content folder and are marked with share icons for users with which you shared the resources.

 ❏ **Other private content.** Private content, which is intended to be accessed by a particular group of developers or which is being prepared for publication. The owners of private resources are permitted a standard set of capabilities for their content. The owner may be either a user or a group, and private content may be shared with other users or groups if the owner has been granted the ability to share that content. The ability to create new private resources inside a published folder is a controlled permission.

❏ **Reporting Objects** are report templates that contain the data source fields that users can select in the InfoAssist reporting tool to build a report or chart. Reporting Objects are typically designed by a developer, administrator, or any user that has privileges to create Reporting Objects. Using InfoAssist, you can select fields for the report or chart, manipulate and style the data, and save the procedure, which can be saved as private content in the My Content folder or a folder in which you can save reports. For more information on the Reporting Objects tool, see *Content reference to: Reporting Objects*.

When you create a folder, it is private content. Private content appears as a gray folder in the tree. If you share a folder, the folder includes a link icon and is available either to all users, specific groups, or users permitted to access the folder location. If you publish the folder, it appears as a manila-colored folder in the tree and is available to all users.

Identifying Content in the Resources Tree

The icons located next to each item in the Resources tree represent the item type. In the following table, the first column lists the icons, and the second column describes what they represent.

Icon	Identifies
	Folder. Allows users to organize their private or published application content.
	Shared folder. Contains private content a user has given access to all users permitted to access the folder or is shared with specific groups of users.
	My Content folder. Provides the user with a location to create private reports, output, and schedules. This is created when the parent folder has the Auto create My Reports folder property selected and the user is permitted to create private content in a My Content folder. The private content within this folder cannot be published.
	Report procedure. Contains the core language commands to tell the TIBCO WebFOCUS® Reporting Server how to create the report.
	Shared reports procedure. Contains report procedures to which the user has given access to all users or a specific group of users who are authorized to access the folder the shared report is located in.
	Visualization. A graphical representation of your data, comprised of one or more visuals. Visuals can be charts, maps, or grids.
	Reporting Object. A report procedure (FEX) that is a tailored view of a set of data that groups or individual users use to create personal reports quickly and in compliance with the reporting rules and guidelines of your company.

Icon	Identifies
	Chart procedure. Contains the core language commands to tell the WebFOCUS® Reporting Server how to create a chart.
	Document. Customized document created in InfoAssist.
	Collaborative portal. An analytical content management and deployment system that provides a flexible environment for users to access BI content, including visualizations, reports, charts, maps, and interactive InfoApps.
	Page. An item that is used to organize a wide array of dynamic content. A page can be created as part of a portal, in which case it resides in the Resources folder of that portal by default, but can be moved to another workspace or folder. A page can also be created as a stand-alone item. Pages can only be viewed inside a portal.
	Schedule. Specifies when to run a report procedure, how to distribute the report (Email, FTP, Managed Reporting, Report Library, Printer), and the destination to which the report will be distributed. This is available when licensed for ReportCaster.
	Alert procedure. A report procedure that evaluates whether a defined condition is true or a file exists to determine whether to run (trigger) the specified or referenced report request. ReportCaster can be used to schedule and distribute an Alert report and specify how the Alert test should be evaluated after it has been triggered.
	Distribution List. Used with a ReportCaster schedule (Email, FTP, or Printer) to specify the email addresses, directory locations, or printers to distribute.
	Library Access List. Used with a ReportCaster Library schedule to specify the groups and users that the private Library report will be shared with.

Icon	Identifies
	Library Report. Library reports can contain links to web resources (live links) and to other reports (drill-downs). The Report Library provides secure access to library content and it allows the user to save multiple versions of the same report output, set an expiration date, and keep a specified number of versions. The Report Library is only available to ReportCaster users who have been granted library privileges.
	Watch List Report. A report of particular interest that the user subscribes to in the Report Library. Each time a new version of the report is distributed, the user receives an email notification.
	Stylesheet file. Specifies how to apply WebFOCUS styling to a report or chart created by the WebFOCUS Reporting Server.
	Cascading Style Sheet (CSS) file.
	Microsoft® Office Excel Worksheet.
	Adobe® Acrobat PDF file.
	GIF image file.
	HTML file.
	JPG image file.
	PNG image file.
	SVG image file.
	Webpage or a URL to run a report.
	Blog. An interactive item that operates as commonly seen blogs on the internet and allows users to post and view comments.

The following topics describe the shortcut menu options for each type of item.

Options for Folders and Items

When you right-click an item in the Resources tree on the Legacy Home Page, the options displayed in the shortcut menu are determined by the selected item type and the tools and features you are permitted to access. For more information, see the *TIBCO WebFOCUS*® *Security and Administration* technical content.

For details about using the Schedule option to schedule reports, see the *TIBCO WebFOCUS*® *ReportCaster Guide*.

Reference: ## Options for Folders

The following options are available when you right-click a folder:

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

Enables you to create a visualization in InfoAssist.

Page

Enables you to create a stand-alone page using the WebFOCUS Designer.

Sample Content

Opens the Open dialog box, where you can select a Master File for generating sample content.

Shortcut

Enables you to create a shortcut to a repository resource or a Master File.

Alert

Enables you to create an Alert in Alert Assist.

Reporting Object

Enables you to create a Reporting Object in the Reporting Object tool.

Text Editor

Enables you to create a procedure with the Text Editor.

URL

Enables you to create a link to a URL with the Create URL dialog box.

Collaborative Portal

Enables you to create a collaborative portal, an analytical content management and deployment system.

Portal Page

Enables you to create a portal page, which is a feature that is used to organize a wide array of dynamic content. Portal pages can only be viewed inside a portal.

Schedule

Enables you to create a schedule with the Advanced Scheduling tool.

Distribution List

Enables you to create a Distribution List with the Distribution List tool.

Library Access List

Enables you to create a Library Access List with the Library Access List tool.

Folder

Creates a new folder.

Note: On the WebFOCUS Home Page, the New Folder dialog box shows Title and Name fields. On the Legacy Home Page, the New Folder dialog box shows Title and Summary fields.

Blog

Enables you to create a blog, where users post and view comments.

Duplicate

Makes a copy of the item with an underscore and number appended to the title, for example, duplicating Sales_Report creates Sales_Report_1 in the same location. The number is incremented each time a duplicate is created.

Cut, Copy, and Paste

Cuts, copies, or pastes the folder and its contents, or individual folder items. When you cut or copy and then paste an item within a folder, the new item displays with an underscore and incremental number. For example, if you copy Report1, then paste it within the same folder, the new report is titled Report1_1. You can also cut or copy and paste a folder item into a different folder.

Delete

Deletes the folder and its contents.

Change Title

Enables you to change the folder title. The Title is the value that displays in the tree.

Note: Changing the folder *Title* value does not change the folder *Name* value.

Refresh

Refreshes the content of the folder.

Upload

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

Metadata

Enables you to create or edit a synonym using the Reporting Server browser interface.

Search

Launches the Search tool.

Publish/Unpublish

Allows or suppresses public access to the content.

Show/Hide

Shows or hides the item.

Share/Unshare

Enables you to share or unshare the folder with all users that are permitted to access the folder where the item is located.

Security

Provides access to the following options:

Rules

Provides access to the security rules defined on the folder.

Rules on this Resource

Shows the security rules for the folder.

Effective Policy

Shows the defined rules that specify the permitted functionality on the folder.

Owner

Allows you to set the resource owner, either Published (no specific owner), or a specific group or user.

Properties

Shows the properties of the folder.

ReportCaster Explorer

Launches the ReportCaster Explorer, passing the selected folder location for which the ReportCaster Explorer will obtain and display information.

Note: The options available for a folder are also available for many other types of items.

Reference: **Options for Reports, Charts, and Visualizations**

Like folders, report and chart procedure options include the Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Share/Unshare, Share with, Security, and Properties options, as described in *Options for Folders* on page 26.

Report and graph procedures also include the following shortcut menu options:

Run

Runs the report procedure or schedule.

Run Deferred

Submits a report procedure or a schedule for deferred execution.

Run With SQL Trace

Runs a report and includes an SQL trace of the report results.

Note: The Run with SQL Trace option is not available for visualizations.

Schedule

Schedules a report procedure. Scheduling options include Email, FTP, Printer, Report Library, and Repository.

Edit

Edits an item with the tool that was used to create it.

Edit With

Provides the options of editing an item in InfoAssist or in the Text Editor.

Create Shortcut

Creates a shortcut to this item.

Add to Favorites

Adds the item to the Favorites folder.

Note: The options available for report and graph procedures are also available for many other item types.

Reference: Options for Reporting Objects

Like folders, Reporting Object options include the Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Security, and Properties options, as described in *Options for Folders* on page 26.

Like report procedures, Reporting Object options include the Run, Run Deferred, Edit, and Add to Favorites options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Reporting Objects also include the following shortcut menu option:

New

Enables you to create a new report, chart, or document using InfoAssist.

Reference: Options for a Save Parameter Report Procedure (FEX)

There are two types of Save Parameter reports. One can be a procedure (FEX) created from the Autoprompt page, described here. The second type, a Save Parameter report created from an HTML page created using the TIBCO WebFOCUS® App Studio HTML canvas, is described in the following reference.

Like report procedures, Save Parameter report procedure (FEX) options include the Run, Run Deferred, Run With SQL Trace, Schedule, Edit, and Add to Favorites options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Like folders, Save Parameter report options include the Duplicate, Cut, Copy, Delete, Change Title, and Properties options, as described in *Options for Folders* on page 26.

Save Parameter reports also include the following shortcut menu option:

Edit Parameters

Enables you to edit report parameters previously saved from the Autoprompt page before running the request.

Reference: **Options for a Save Parameter Report From an HTML Page**

From an HTML page created using the WebFOCUS® App Studio HTML canvas, an HTML Save Parameter report is created and has shortcut menu options consistent with the HTML file type, as described in *Options for Excel Workbooks, PDF, HTML, and Image Files* on page 33.

The Edit option will display the HTML page with the report parameter values previously saved from the HTML page.

Reference: **Options for Collaborative Portals**

Like procedures, these options include the Run, Edit, Delete, Change Title, Add to Favorites, Publish/Unpublish, Show/Hide and Security options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Collaborative portals also include the following shortcut menu options:

Run in New Window

Runs the portal in a new browser window.

Note: If the browser is configured to run links in a new tab, the portal runs in a new tab.

Customizations

Provides access to the following options:

❏ **Remove My Customizations.** Removes your own customizations from a portal and its pages.

❏ **Remove Customizations for All Users.** Removes all user customizations and custom pages created at run time.

Manage Alias

Opens the Manage Alias dialog box, where you can create an alias for the selected collaborative portal. This feature is only available to Administrators.

Reference: **Options for Portal Pages**

Like procedures, these options include the Edit, Delete, Change Title, Publish/Unpublish, Show/Hide and Security options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Like folders, these options include the Duplicate, Cut, Copy, and Properties options, as described in *Options for Folders* on page 26.

Portal pages also include the following shortcut menu option:

Unlink

Removes the portal page from all portals.

Reference: **Options for Schedules**

Like folders, Schedule options include the Duplicate, Cut, Copy, Delete, Change Title, Share/ Unshare, Share with, and Properties options, as described in *Options for Folders* on page 26.

Like report procedures, Schedule options include the Edit, Create Shortcut, and Run options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Schedules also include the following shortcut menu option:

View Log

Launches the Schedule Log Options dialog box, where 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.

Reference: **Options for Distribution Lists and Library Access Lists**

Like folders, Distribution List and Library Access List options include the Duplicate, Cut, Copy, Delete, Change Title, Share/Unshare, Share with, and Properties options, as described in *Options for Folders* on page 26.

Like report procedures, Distribution List and Library Access List options include the Edit option, as described in *Options for Reports, Charts, and Visualizations* on page 29. The Edit option invokes the Distribution List and Access List tools.

Reference: **Options for StyleSheets**

Like folders, StyleSheet options include the Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Share with, Security, and Properties options, as described in *Options for Folders* on page 26.

Like report procedures, StyleSheet options include the Edit and Add to Favorites options, as described in *Options for Reports, Charts, and Visualizations* on page 29. The Edit option invokes the Text Editor.

Reference: **Options for URLs**

Like folders, URL options include the Duplicate, Cut, Copy, Delete, Change Title, Share/ Unshare, Share with, and Properties options, as described in *Options for Folders* on page 26.

Like report procedures, URL options include the Edit, and Add to Favorites options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

URLs also include the following shortcut menu option:

View

Enables you to launch the URL link.

Reference: **Options for Excel Workbooks, PDF, HTML, and Image Files**

Like folders, these options include the Duplicate, Cut, Copy, Delete, Change Title, Publish/Unpublish, Show/Hide, Security, and Properties options, as described in *Options for Folders* on page 26.

These files also include the following shortcut menu option:

View

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

Note: Edit, which is available for HTML files, launches the Text Editor.

Reference: **Options for Blogs**

Like procedures, these options include the Edit, Delete, Change Title, Share, Share with, and Properties options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Like folders, these options include the Duplicate, Cut, Copy, and Properties options, as described in *Options for Folders* on page 26.

Blogs also include the following shortcut menu option:

Comments

Provides access to the following options:

❏ **View Comments.** Opens the blog item and expands all comments.

❏ **Remove All Comments.** Clears all comments from the blog.

Reference: **Options for Favorites**

These files include the following shortcut menu option:

Remove Favorite

Removes the Favorite from the list.

Reference: **Options for WebFOCUS Reporting Servers**

Like folders, these options include New, Refresh, and Security, as described in *Folder and Item Properties* on page 34.

These files also include the following shortcut menu option:

Reporting Server Console

Enables you to sign in to the WebFOCUS Reporting Server.

Reference: **Options for Portals**

Like procedures, these options include the Run, Edit, Delete, Change Title, Publish/Unpublish, and Security options, as described in *Options for Reports, Charts, and Visualizations* on page 29.

Like folders, these options include the Refresh option, as described in *Folder and Item Properties* on page 34

Like collaborative portals, these options include the Run in New Window and Customizations options, as described in *Options for Collaborative Portals* on page 31.

Portals also include the following shortcut menu option:

Translations

Displays the language selected for the portal.

Folder and Item Properties

Authorized users can select the Properties option to review information about a folder or item, including when it was created, last modified, title, name, and settings that control the WebFOCUS Reporting Server and applications it will access. There are also settings that control the functionality available to users when accessing the folder or running or scheduling an item.

The following image displays the Properties dialog box for an item that opens when you view the properties of an item from the Legacy Home Page.
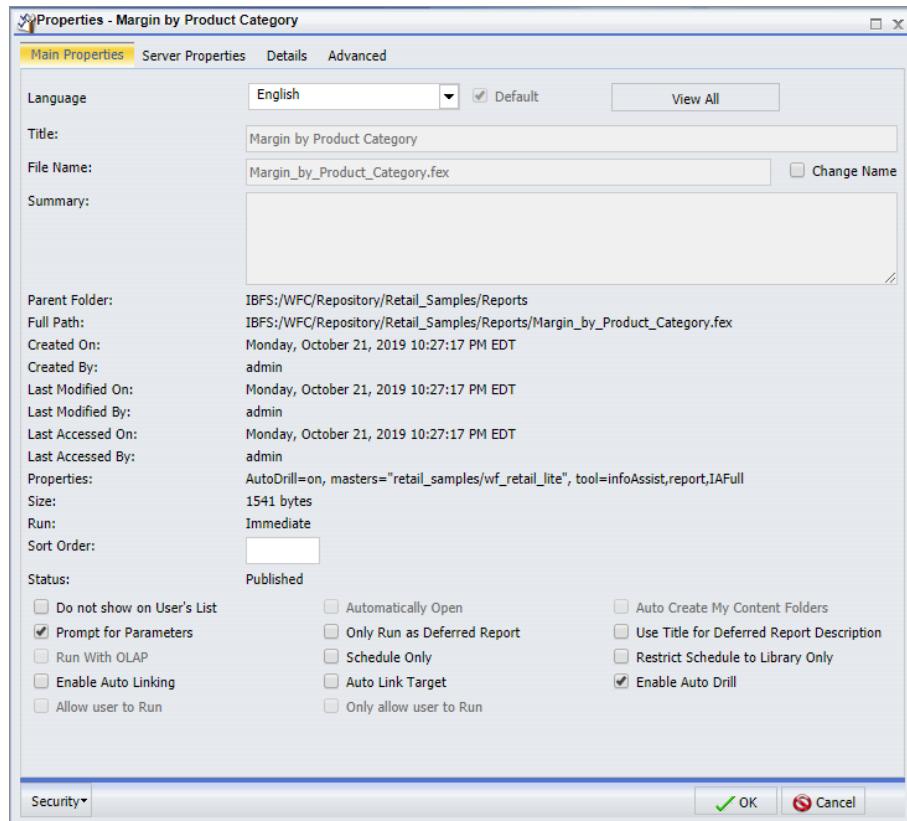
The Main Properties tab includes:

❏ **Language.** Provides a list of languages that you can select.

❏ **View All.** Opens the Language Properties dialog box, where you can select a language.

❏ **Title.** Value displayed in the tree that users use to identify the content within the folder content.

❏ **Folder/File Name.** Unique reference to the item within the folder. Select the *Change Name* check box to change the name of the folder.

❏ **Summary.** Detailed explanation that provides additional information about the item.

❏ **Parent Folder.** Previous folder in the folder path of the WebFOCUS repository.

❏ **Full Path.** Full path of the folder in the WebFOCUS repository.

❏ **Created On.** Date the folder was created.

❏ **Created By.** User who created the folder.

❏ **Last Modified On.** Date the folder properties were last modified.

❏ **Last Modified By.** User who last modified the folder properties.

❏ **Last Accessed On.** Date the folder was last opened.

❏ **Last Accessed By.** User who last opened the folder.

❏ **Properties.** Properties of the folder.

❏ **Size.** Displays N/A bytes for folders. For items, displays the size in bytes.

❏ **Run.** Displays N/A, as this property is not applicable to folders. For items, displays Immediate.

❏ **Sort Order.** Specifies the order to list the folder in the tree.

❏ **Status.** Indicates whether the folder is Published or Private. Private will also display the folder owner information.

In addition, the following options are available to control the usage of content:

❏ **Do not show on User's List.** Specifies whether to display the folders to users not permitted to create content in the folder. This option is primarily used when the folder needs to be made temporarily unavailable to end users permitted to access the content in the folder.

❏ **Automatically Open.** Automatically expands a folder in the Resources tree.

❏ **Auto Create My Content Folders.** Creates My Content folders for users with My Content Folder privileges so the user has a place to save their private content, such as procedures they may create using InfoAssist or report output they save from the Deferred Status interface.

❏ **Prompt for Parameters.** Indicates whether to display the Autoprompt HTML page to allow the user to view and select parameter values. When unchecked, users will still be prompted if there are any parameters that do not have a value supplied.

❏ **Only Run as Deferred Report.** Runs the report in deferred mode.

❏ **Use Title for Deferred Report Description.** Indicates whether or not to prompt for a custom deferred report description. If selected, this option gives you an alternative to being prompted for a custom deferred report description. If you want to disable prompting for custom deferred report descriptions for all reports, see the Custom Deferred Report Description setting content in the *TIBCO WebFOCUS® Security and Administration* manual.

❏ **Run With OLAP.** OLAP-enables the report.

❏ **Schedule Only.** Indicates that the report can only be scheduled using ReportCaster when the user does not have write access. This option is not available for use with Reporting Objects.

❏ **Restrict Schedule to Library Only.** Prevents emails distribution for security sensitive scheduled reports, and restricts them to the library distribution only.

❏ **Enable Auto Linking.** Automatically establishes drill-down links from column data to the target reports that you link together.

❏ **Auto Link Target.** Identifies a report as the target report that is run when the drill-down link is triggered.

   Note: The Auto Linking between reports will only work if it the target report contains a parameterized field that corresponds to one of the fields in the primary Auto Link report. For more information on Auto Linking, see the *TIBCO WebFOCUS® InfoAssist User's Manual.*

❏ **Enable Auto Drill.** Creates drill-down links in reports and charts that contain hierarchical data.

❏ **Allow user to Run.** Allows a user not permitted to access the Reporting Object tool to run the Reporting Object interactively, using the Run or Run Deferred options.

❏ **Only allow user to Run.** Specifies to not allow users to use InfoAssist with a Reporting Object. Depending on the effective policy, users can only use the Run or Run Deferred options.

Authorized users can view or edit the access rules, effective policy, or sharing permissions by clicking *Security.*

The Server Properties tab, shown in the following image, allows you to manage the server and application path settings.
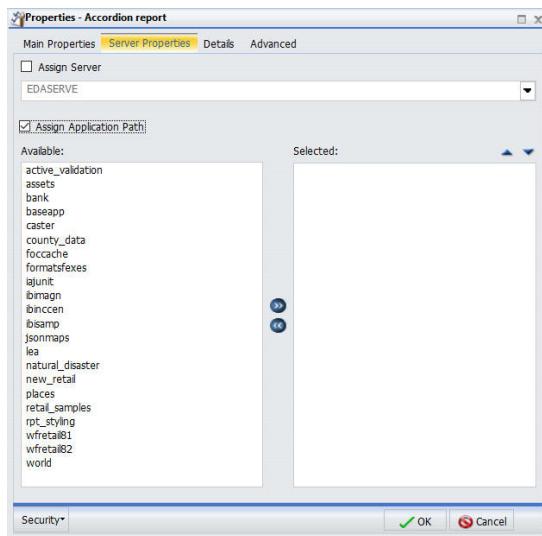
To change the server, check *Assign Server* and select one of the available servers. Move application paths from the Available box to the Selected box by double-clicking them or by selecting them and using the double arrow buttons. Use the up and down arrows to change the preferred order of the application paths.

The Details tab, shown in the following image, displays the components of the item in a tree structure to allow a user to review the request information prior to running or opening the item in a tool. The tree structure displays the components of a request, such as Master Files, data elements, sorts, conditions, expressions, output formats, and joins. These components can be opened to show the fields referenced. The displayed component folders are specific to each request.
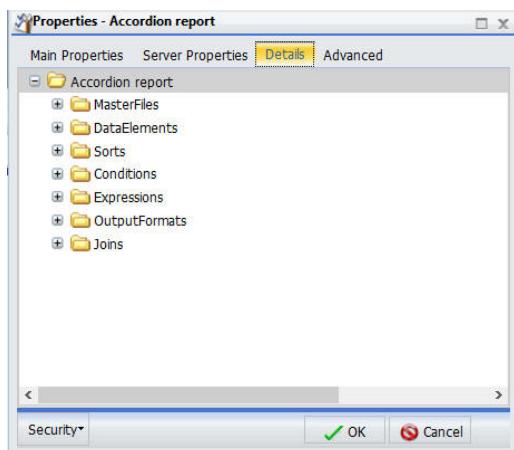
The Advanced tab, which is shown in the following image, allows you to set default height and width values for the item, when it is displayed inside a portal at run time. You can also select an HTML iframe or HTML div load method for InfoAssist charts that have the new attribute syntax applied.
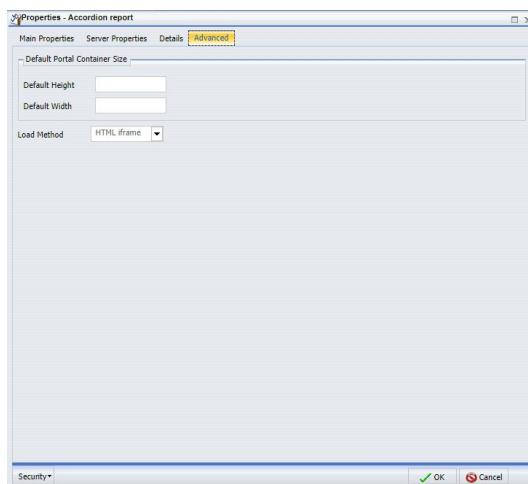
Loading InfoAssist Charts

You can select the container load method for InfoAssist charts by using the Advanced tab of the Properties Dialog box. The two load methods are:

❏ **HTML iframe.** Isolates chart libraries from a page container. This method is the default setting.

❏ **HTML div.** Shares chart libraries across page containers. This method may result in better load performance.

The option to select a load method is available for InfoAssist charts that run in basic or collaborative portal pages, and have the new attribute syntax applied. The new attribute syntax adds additional relevant field containers for these chart types. Chart attribute syntax differs, depending on the chart type.

You can use field containers to specify fields in a specific area of the chart, based on the function that you want performed. Horizontal Axis, Color, and Tooltip are examples of field containers that are part of the new chart attribute syntax.

Procedure: **How to Select a Load Method**

1. On the Legacy Home Page, in the Resources tree, open a domain or folder, right-click an item, and then click *Properties*.

   The Properties Dialog box opens.

2. Click the *Advanced* tab.

3. Select a Load Method, as shown in the following image.

4. Click *OK*.

2. Workspace Content in the Resources Tree
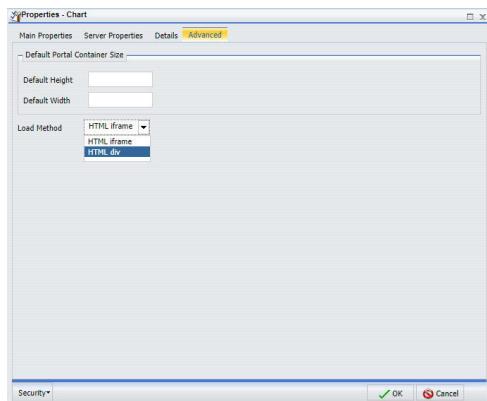
Changing the load method affects the container type that is created when content is added to a portal page canvas. It does not affect previously created containers. If you change a load method from HTML iframe to HTML div, previously created iframe containers will not become div containers. For more information on InfoAssist charts, see the *TIBCO WebFOCUS® InfoAssist User's Manual.*

Filtering Content in the Resources Tree

If your view has the Resources tree filter enabled, you are able to filter the items that appear. Filtering is available from the top of the tree.

Procedure: How to Filter the Resources Tree

1. From the top of the Resources tree, click *Filter*.

   The Filter dialog box opens.

2. Enter your filtering criteria in the *Value* field.

3. Optionally, select on option from the *Type* drop-down menu. You can filter reports, links, Master Files, and a range of documents, as well as Schedules, Distribution Lists, and Access Lists.

4. Click the *Apply Filtering* icon.

   Only items that match the criteria are displayed in the tree.

Note: You can remove the filtering by clicking the *Clear Filtering* (X) icon at the right of the *Value* field. Filtering is also removed when you log off.

Searching Workspace Content in the Resources Tree

The Content Search allows you to perform specific searches of the workspaces available to you.

You can add items from a Content Search to your favorites list directly from the search results window. You can also use Content Search when creating content blocks to quickly find items.

Access the Search dialog box by right-clicking your content and then selecting *Search* from the shortcut menu.

Reference: Search Dialog Box

The Search dialog box has the following options:

Saved Searches

    Search Name

        Select a search that was previously saved.

Business Intelligence Portal

Search Query

Starting Folder

Select the folder you want to search. To search across all available folders, select *All Folders*.

Title Search

Enter a text string for which you want to search. The search looks for matching values within the title of folders and items within the domain folder path. If you leave this value blank, all available items from the selected domain are returned to the output panel on the right side of the window.

Select from the following:

❏ **Any Match.** Searches for the text string anywhere within the titles.

❏ **Starts With.** Searches for a title that starts with the search string.

❏ **Ends With.** Searches for a title that ends with the search string.

❏ **Exact Match.** Searches for a title that exactly matches the string entered.

Column Display

You can include the following in the results:

❏ Folder

❏ Path

❏ Last Modification Date

❏ Reporting Server

❏ Application Path

Resource Types

You can limit the search to the following:

❏ Report

❏ Portal

❏ Page

❏ URL

❏ Reporting Object

❏ Folder

❏ Schedule

❏ Library Access List

❏ Distribution List

❏ Library Report

❏ All

Reporting Server

Reporting Server

Specifies the WebFOCUS Reporting Server to use for the search.

Application Path

Specifies the Application Path to use for the search.

Creating Shortcuts

Authorized users can create shortcuts to repository resources and Master Files. Once a shortcut to a Master File is created, you can use it to build visualizations and reports. Once a shortcut to a repository resource is created, you can copy, delete, edit, and run this item. You can also publish and share your shortcuts to make them available to other users and groups.

Procedure: **How to Create a Shortcut to a Repository Resource**

1. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, point to *Shortcut*, and then click *To Repository Resource*.

   The Create Shortcut dialog box opens.

2. Click *Browse*.

   The Shortcut Target dialog box opens.

3. Navigate to the resource of your choice, such as folder, report, chart, or visualization, and then click *OK*.

   The Title field is automatically populated with the name of the original item and the word *Shortcut*.

4. Optionally, edit the Title and populate the Summary field.

5. Click *OK*.

   A confirmation message indicates that your shortcut is created successfully.

6. Proceed in one of two ways:

❏ Click *Browse* again to create another shortcut.

❏ Click *Cancel* to close the Create Shortcut dialog box and begin using your new shortcut.

Procedure: **How to Create a Shortcut To a Master File**

1. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, point to *Shortcut*, and then click *To Master File*.

   The Open dialog box opens.

2. Navigate to a Master File, previously generated through the Upload wizard or Metadata wizard, and then click *Open*.

   The shortcut to the Master File appears in your selected directory in the Resources tree. You can use this shortcut to create reports and visualizations. You can also publish or share the shortcut to make it available to other users.

Creating URLs

Authorized users can create URLs to webpages and store them within the repository. These URLs can further enhance analytics, providing an additional interactive context to your data. You can run a URL in a new tab, use it in a dashboard, and add it to a personal page. If your URL is optimized for use in an iFrame, you can embed it within a container on a page. You can also publish and share a URL to make it available to other users and groups.

Procedure: **How to Create a URL**

1. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, and then click *URL*.

   The Create URL dialog box opens.

2. Populate the Title field, type the URL to your selected webpage in the URL field, and then click *OK*.

   The URL appears in your selected location in the Resources tree.

Procedure: **How to Embed an iFrame-Optimized URL in a Portal**

1. Copy an iFrame-optimized URL from the web, as shown in the following image.
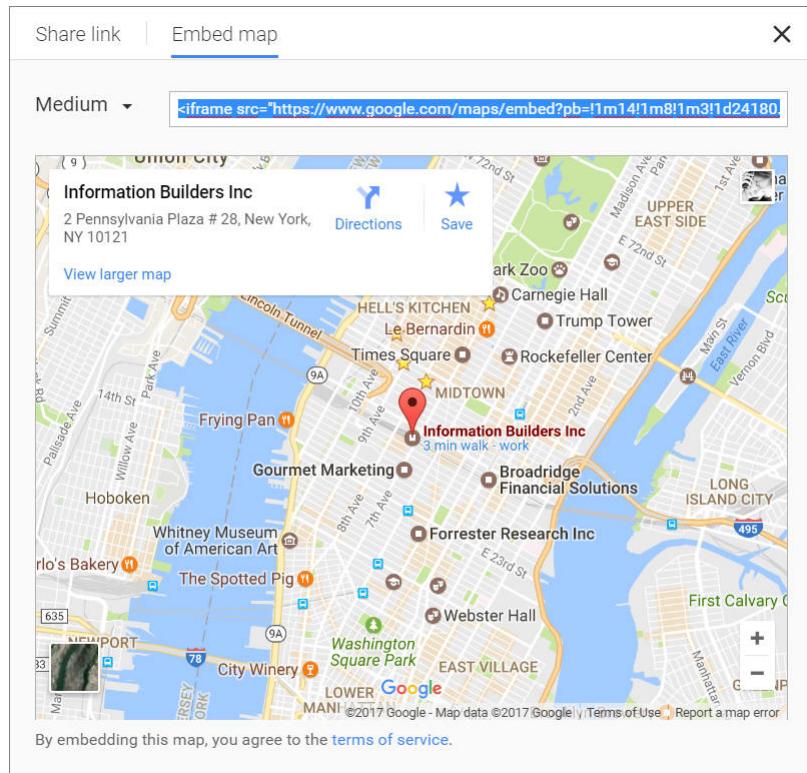
2. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, and then click *URL*.

    The Create URL dialog box opens.

3. Populate the Title field, and paste the copied URL in the URL field.

4. Remove any iFrame related syntax that surrounds your URL, as shown in the following images.

5. Click *OK* to close the Create URL dialog box.

    Your URL item is complete and ready to be displayed in a portal.

6. In the Portal Designer, on the *Insert* tab, click *WebFOCUS Resources*.

7. Drag the URL from the repository onto a page.

The URL content displays perfectly within the container, as shown in the following image.
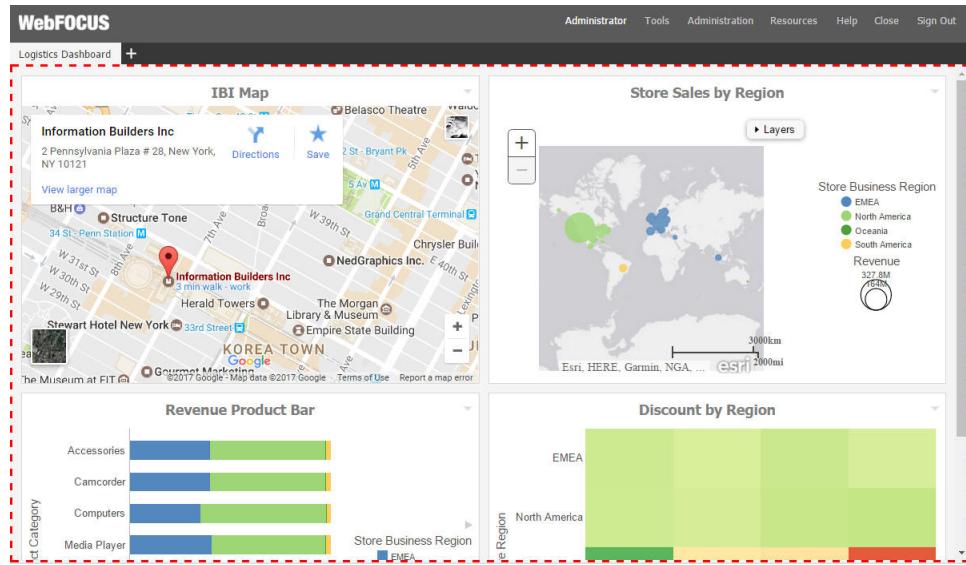
Creating Blogs

If the collaborative portal feature is enabled in your environment, you can create blogs and include them in your collaborative portals. A blog is an interactive content item that operates as commonly seen blogs on the internet and allows users to post and view comments. Blogs abide by the same security rules that apply to other items in the repository. You can publish, unpublish, hide, and move blogs between domains or folders. You can also share blogs with other users and groups.

Procedure: **How to Create a Blog**

1. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, and then click *Blog*.

   The New Blog dialog box opens.

2. Type the requested information in the dialog box, as follows.

   ❏ **Title.** Value displayed in the Resources tree that is used to identify the blog.

   ❏ **Summary.** Optional explanation of the blog. It is displayed in the ToolTip when the mouse hovers over the blog.

3. Once you have provided the appropriate information, click *OK*.

   The Comments window opens.

4. Click the *Add comment* link to add a new comment.

5. Once you are done adding and editing comments, click Post to post the comment and close the Comments window.

6. You can optionally interact with the comments by using the following commands:

   ❏ Click the *Refresh* icon in the comments menu, to refresh comments.

   ❏ Click the *Search* button in the comments menu, and type a key word or words in the search field, to search through comments. You can specify the search criteria by clicking the arrow next to the Search button and selecting search criteria, such as user name, content, or meta tags.

   ❏ Click the *Remove All* button to remove all comments from all users. The Remove All option is only available to users with the Manage Comments privilege.

   You can now publish, share, and add your blog to a page or portal.

Using Favorites

You can further customize your Home Page by using the Favorites feature. Favorites can be reports, graphs, hyperlinks, Reporting Objects, and other item types. The Favorites feature provides a convenient and fast way to find and use your favorite content, without having to search for it. You can interact with your favorite content and view its properties, and also access Favorites from a mobile device.

From the Home Page, Favorites appear in the Favorites area, as shown in the following image.
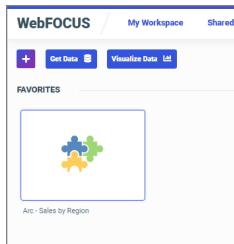
From the Legacy Home Page, Favorites appear in the Resources tree, as shown in the following image.
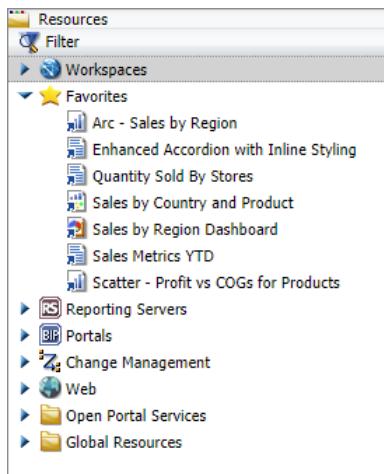
Adding Content to Favorites

You can add items to Favorites from any workspace or folder if you have permission to do so. To designate an item as a Favorite, right-click the item, and click *Add to Favorites*. To remove an item as a Favorite, right-click the item and click *Remove Favorite*.

If you right-click the item from the Home Page, you can select from the following options, depending on file type:

❑ Click *Run* or select a different way to run the item by pointing to *Run….*

❑ Point to *Schedule*, and choose a scheduling option for the item.

❑ Click *Edit* or *Edit with text editor* to edit the item in the appropriate tool or text editor.

❑ Click *Remove my customizations* to remove customized item settings.

❑ Click *Remove from Favorites* to remove the item from the Favorites view.

❑ Click *Properties* to open the Properties panel, and edit the properties of the item.

If you right-click the item from the Legacy Home Page, you can select from the following options, depending on file type:

❑ Click *Run* or select a different way to run the item by clicking *Run Deferred* or *Run With SQL Trace*.

❑ Point to *Schedule*, and choose a scheduling option for the item.

❑ Click *Edit* or *Edit With* to edit the item in the appropriate tool or text editor.

❏ Click *Remove My Customizations* to remove customized item settings.

❏ Click *Change Title* to change the item title.

❏ Click *Remove Favorite* to remove the item from the Favorites view.

❏ Click *Properties* to open the Properties panel, and edit the properties of the item.

Accessing Favorites from a URL

You are not required to save items to Favorites to view them on mobile devices. The Home Page is optimized for viewing on mobile devices. It automatically adjusts to a smaller screen or browser width. There are several interface and functionality changes that occur when you switch from the full view to the mobile view.

You can create and share a URL to your Favorites, allowing you or other users to access your Favorites directly.

In a desktop or mobile browser, type the address below.

```
http://server:port/ibi_apps/favorites
```

where

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

port
    Is the port number on which the server is listening.

Assigning Tags to Content Items

To refine a search for content within a workspace or folder in your repository, you can assign tags to content items. These tags provide additional search criteria that you can use to identify related content items quickly. Tags are turned off by default, and display as a column in the list view of the WebFOCUS Home Page.

To test the tag you assigned to the item, perform a search. The tag and item should appear in the search results. An example of a Product tag is shown in the following image.

Using the Mobile Faves App

Mobile Faves is a simple, intuitive app that empowers users of iPad and iPhone devices, or Android phones and tablets, with robust, innovative, easy-to-use reporting and analysis. The app allows users to manipulate data from a variety of sources in an almost unlimited number of ways in just a couple of taps. Users can also manage their business dashboards and content for viewing and interactive analysis, even when they are not connected to the Internet.

Items must be tagged as FAVES to be viewed in the Mobile Faves app. Migrated Mobile Favorites created prior to WebFOCUS Release 8.2 Version 04 are automatically assigned a localized Mobile Faves tag during the migration process.

Sharing Content in TIBCO WebFOCUS

Each workspace in the repository, except the Public domain, comes with the private My Content folder. Whenever you create content inside the My Content folder, this content remains private and only visible to you, unless you share it with other users and groups. You can share content in one of two ways:

❏ **Share with all users.** This method makes the content available to all users that have access to the workspace.

❏ **Share with specific users and groups.** This method allows you to choose which users and groups are able to access to your private content.

In both scenarios, you can revoke access to your content by unsharing it.

Procedure: **How to Share Content with All Users**

1. In the Resources tree, navigate to a workspace of your choice and open the *My Content* folder.

2. In the My Content folder, right-click the item that you want to share, and then click *Share*.

The Share icon now displays next the default icon, as shown in the following image.
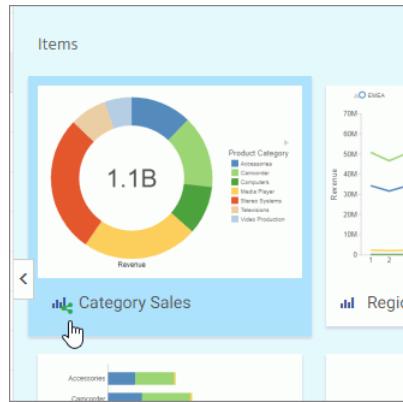
The item is now shared with all users that have access to this domain.

3. To unshare the item, right-click it, and then select *Unshare*.

Procedure: **How to Share Content with Specific Users and Groups**

1. In the Resources tree, navigate to a workspace of your choice and open the *My Content* folder.

2. In the My Content folder, right-click the item that you want to share, and then select *Share with*.

   The Share with Others dialog box opens.

   Note: If your sharing privilege does not allow you to open the Share with Others dialog box, you can share or unshare your item by clicking the *Share* option. In this case, the item is shared with every user that has access to the domain in which the item resides.

3. In the Search field, type the name of the user or group with which you want to share this item.

4. Click the correct entity from the drop-down list, as shown in the following image.
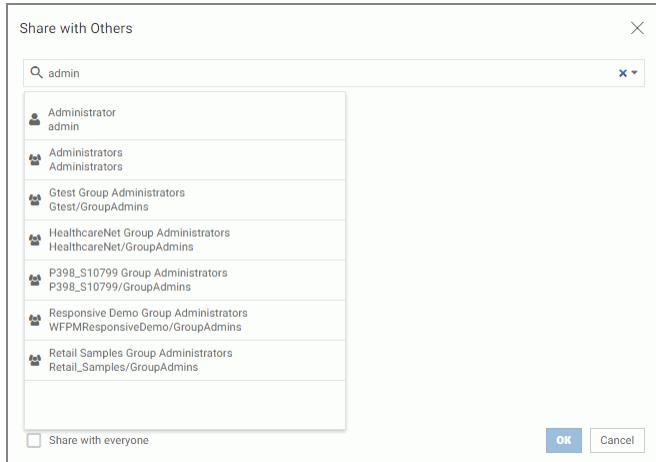
The name now displays below the Search field. The item is shared.

5. Optionally, add more users or groups.

   You can narrow your search by clicking an arrow and selecting *Users* or *Groups*, as shown in the following image.
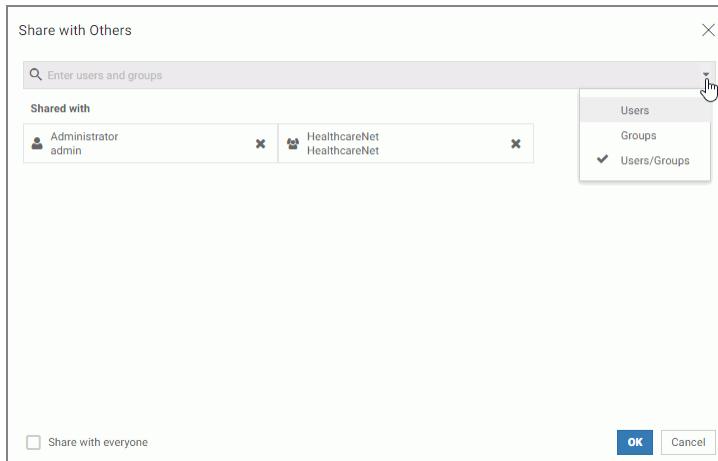
Note: You can also share the item with all users by selecting the *Share with everyone* check box.

6. Once you have selected your options, click *OK*.

The icon now indicates that the item is shared. You can unshare it at any time or go back to the Share with others dialog box and edit your choices.

Using the Mobile Viewer to Access Content

The Mobile Viewer is a web-based interface that you can use to access content and share it with other users, from a basic URL. When you use the Mobile Viewer, you do not need to save content as a Favorite or create a portal. Instead, you can organize content in a folder and distribute the URL to this folder to other users who can bookmark the URL and run that content online at any time.

One of the benefits of the Mobile Viewer is its simplicity. You can create and share your content through a URL in just three steps. Additionally, the Mobile Viewer instantly syncs with the designated repository folder. When you add, subtract, or modify content in the designated folder, these changes are instantly reflected in what you can access. Folder content also respects WebFOCUS security, so you can optionally hide some of the folder content from a group of users with a security rule.

WebFOCUS content can be viewed across different devices using Mobile Viewer. While the feature is especially helpful to users on mobile devices, it can also be used by desktop users in a Web browser. In both scenarios, it provides secure access to a specific set of content.

The Mobile Viewer supports the following content types: reports, charts, visualizations, documents, dashboards, shortcuts, and URLs. The following image shows an example of a chart displayed by the Mobile Viewer.
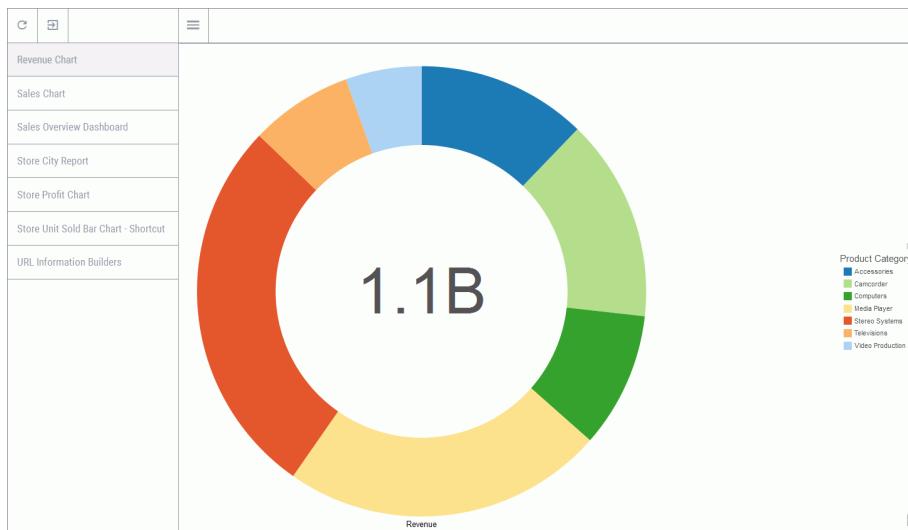
The order in which the content items are displayed in the Mobile Viewer is identical to the sorting order in the designated folder. The default order is alphabetical. You can change this order by configuring the Sort Order property for your items.

You can interact with your content in the same way you would in a browser or inside a portal. You can use filters, zoom in on specific values, or use features like Auto Linking to drill-down to various data points in a report or visual. To get to the default view of the Mobile Viewer at any time, simply refresh your desktop or mobile device browser.

Note:

❏ Certain content types, such as non-responsive HTML documents or complex visualizations, might be difficult to view on mobile devices. Be sure to use content that is optimized for mobile viewing. Additionally, tooltips are not supported on mobile or other touch screen devices. You can view tooltips when using the Mobile Viewer in desktop browsers.

If the folder is empty or if the user does not have permissions to access content in this folder, a message appears, as shown in the following image.

No content was found for this folder. Either the folder does not exist, or you need to check to see if you have access to the content in this folder.

OK
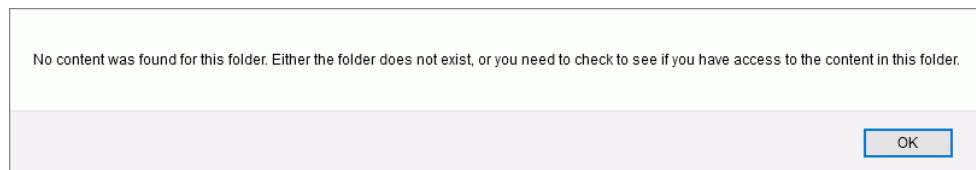
Procedure: **How to Configure Mobile Viewer Access**

1. Create a new workspace or folder, or identify an existing domain or folder to which you want to provide access.

2. Populate the folder with content that you want to view or share with other users in the Mobile Viewer.

3. In a desktop browser or on a mobile device, type the following address:

   `http://server:port/ibi_apps/mv/Path_to_Designated_Folder`

   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_Folder

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

For example:

`http://webfocus/ibi_apps/mv/Retail_Samples/Portal/Small_Widgets`

If the content resides inside a user's My Content folder, then the path should include a workspace name and this user's username preceded by the tilde character, like so:

`http://server:port/ibi_apps/mv/Workspace_Name/~username`

For example:

`http://webfocus/ibi_apps/mv/Retail_Samples/~admin`

The Mobile Viewer page opens.

Note: When using the Internet Explorer 11 browser, the server name in the URL must be fully qualified for the tooltips to display correctly.

Interacting With the Mobile Viewer Interface

When the Mobile Viewer page opens, the first report found in the designated folder runs by default. To access other content in the folder, click or tap the *Open Content Menu* icon ☰. The folder content displays on the left side of the screen. Click or tap the *Close Content Menu* icon ☰ to close the content menu. Click or tap the *Refresh* icon ⟳ to refresh the content list. Click or tap the *Log off* icon ⤇ to close and sign out of WebFOCUS.

Note: Internet access is required for the icons and content to appear correctly. Ad-blocking applications and extensions may prevent the Mobile Viewer icons from displaying correctly.

Understanding the Structure of Business Intelligence Portals

This topic gives you an overview of the structure of a BI Portal, describes their components and explains how to launch and navigate the Portal Designer.

In this chapter:

Identifying Business Intelligence Portals

You can create two types of portals in WebFOCUS: basic and collaborative. Basic portals reside under the Portals node, in the Resources tree, on the Legacy Home Page, while collaborative portals are part of the workspaces in your Repository. Collaborative portals appear under workspaces in the Legacy Home Page and the WebFOCUS Home Page. From the Legacy Home Page, you can access your collaborative portals under the workspaces node. By default, both basic and collaborative portals are available. To change these defaults, an administrator can clear the corresponding check box in the WebFOCUS Administration Console. When the collaborative portal is enabled in your environment, the shortcut menu options for domains and folders include the ability to create new portals and individual pages. You can copy, paste, and move portals and pages between workspaces and folders, creating a fluid workflow and possibilities for sharing, securing, reusing, and modifying content.

Basic portals are characterized by the following features:

❏ Portal pages are included in the portal structure and cannot be shared across portals.

❏ Since portal pages can only be created inside a portal, only Developers can create and edit both portals and portal pages.

❏ Administrators must use security rules to establish a workflow between workspace groups and portals. To simplify this process, workspace templates were created.

Collaborative portals are characterized by the following features:

❏ Portal pages and portals exist as distinct objects in the Repository.

❏ You can copy or link pages to one or more portals.

❏ You can unlink portal pages from all portals and store them as standalone content items.

❏ You can copy, paste, and move portals and portal pages between workspaces and folders.

❏ Creating portal pages and creating portals can be assigned to different user roles.

❏ Most portals do not require special security rules.

In addition to these structural differences, collaborative portals offer several usability enhancements, such as pre-configured page templates, commenting and blogs, the Page Designer, aliasing, and embedding capabilities. The following sections describe the architecture and components of a basic portal, as well as the features that are available to the users of the collaborative portal.

Portal Architecture

A portal consists of several components, as shown in the following diagram.
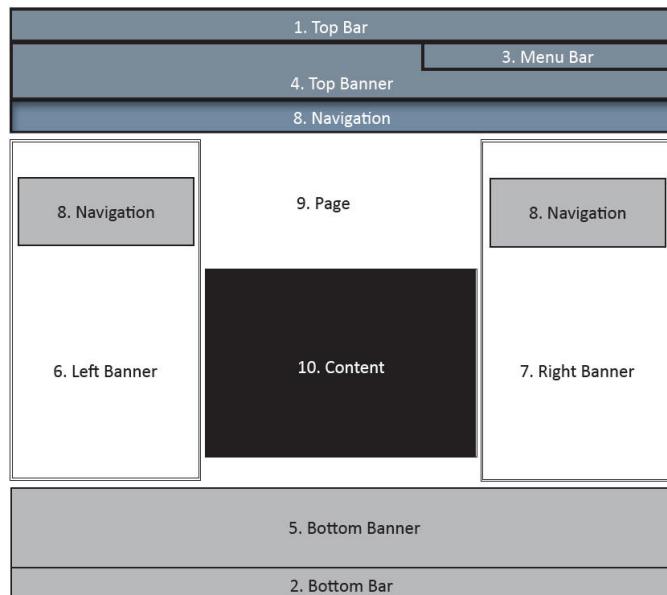
❏ **Component 1 - Top Bar.** The Top Bar is one of three components that can contain the Menu Bar. The Top Bar appears as a component on a portal only if it contains the Menu Bar. The Top Bar cannot contain any item other than the Menu Bar.

❑ **Component 2 - Bottom Bar.** The Bottom Bar is one of three components that can contain the Menu Bar. The Bottom Bar appears as a component on a portal only if it contains the Menu Bar. The Bottom Bar cannot contain any item other than the Menu Bar.

❑ **Component 3 - Menu Bar.** This is a menu of links, which can be contained in the Top Banner (as shown in the preceding diagram), or in the Top Bar or Bottom Bar. The default location for the Menu Bar is in the Top Banner, with a right alignment of the links. The Menu Bar contains items such as:

  ❑ User ID (not a link)

  ❑ Help

  ❑ Sign In or Sign Out

❑ **Components 4-7 - Banner Areas.** Banner areas are the equivalent of headings and footings in a document. They are always present in the portal no matter what page you are on. They can appear on the top, left, right, and bottom of the screen, as shown in the preceding diagram. Each banner area is optional. Banner areas can contain any type of content available in the BI Portal.

  A banner works just like a page. It has the same layout options described in *Portal Pages* on page 80.

  The Top Banner may appear as a component on a portal whether or not it contains the Menu Bar.

❑ **Component 8 - Navigation.** Relative to the page area, the navigation menu can appear on top, to the left, to the right, or not at all.

❑ **Component 9 - Page.** This is the area in which actual content is placed. Within this area, you have panels containing content.

❑ **Component 10 - Content.** This is the actual page content that exists in different containers that can hold any items, from text to reports.

Portal Pages

A portal can be made up of as many pages as you like. Each portal page can create an entry in the navigation structure. A portal page can have one of the following layouts:

❑ **Single Area.** Creates a free-flowing area, where there is no grid. This is the default.

❑ **Fluid Canvas.** Arranges content evenly, and redistributes space as more items are added.

❏ **One Column.** Stretches content to fill the entire page area.

> **Note:** This layout is always used to create a responsive portal page. For more information, see *Building a Basic Responsive Portal* on page 111.

❏ **Two Columns.** Divides the page evenly into two columns.

❏ **Three Columns.** Divides the page evenly into three columns.

❏ **Four Columns.** Divides the page evenly into four columns.

When you select any option other than Single Area, any items that you add to the page automatically snap to place in the layout.

Containers

Containers hold content on portal pages. The following are the types of containers available when you create Business Intelligence Portals:

❏ Panel

❏ Accordion

❏ Tabbed

❏ Responsive

❏ Easy Selector

You can resize containers to accommodate spacing requirements of your page. You can also minimize containers, including those that reside on a locked page. For more information on each type of container, see *Containers* on page 83.

Portal Designer Overview

This topic explains how to create a portal and launch the Portal Designer. It also describes the different components of the Portal Designer interface.

Creating a Portal

You can create a portal in one of the following ways:

❏ From the Legacy Home Page, under the Portals node, using the *New Portal* option.

❏ From the Legacy Home Page, by adding a portal to a workspace template when you create a new workspace.

❏ From the Legacy Home Page, under the Workspaces node, using the *Collaborative Portal* option, when you select a workspace folder.

❏ From the WebFOCUS Home Page, when you select a workspace or folder, and click *Portal* on the Action Bar.

Procedure: **How to Create a Basic Portal**

1. Sign in to WebFOCUS.

2. On the Legacy Home Page, in the Resources tree, right-click the *Portals* node, and then click *New Portal*.

   The New Portal dialog box opens.

3. Supply the requested information on the dialog box, as follows.

   ❏ **Title.** Value displayed in the tree that users use to identify the portal.

   ❏ **Name.** Type a descriptive name for your portal. The name will be used throughout the WebFOCUS application.

   ❏ **URL.** The URL is generated based on the portal name. Another user can enter this URL to access your portal without going to the WebFOCUS Home page.

   ❏ **Security.** Select the *Give others access* check box to bring up the security dialog box when the Portal Designer opens.

4. Once you have completed the fields, click *Create*.

   The portal generates, and is now available under the Portals node. If you did not select the *Give others access* check box, the Portal Designer opens.

   If you did select the *Give others access* check box, the Security Rules dialog box opens. Use it to set the access rules for the portal. For more information, see *Security* on page 72.

Procedure: **How to Create a Basic Portal While Creating a Workspace**

1. Sign in to WebFOCUS.

2. On the Legacy Home Page, in the Resources tree, right-click the *Workspaces* node, point to *New*, and then click *Enterprise Workspace* or *Tenant Workspace*, depending on which type of workspace you want to create.

   The New Workspace dialog box opens.

3. Type the title of the workspace in the Title field.

   The Name field is filled automatically to match the value in the Title field. You can edit it.

4. Select the *Create Portal* check box, as shown in the following image.
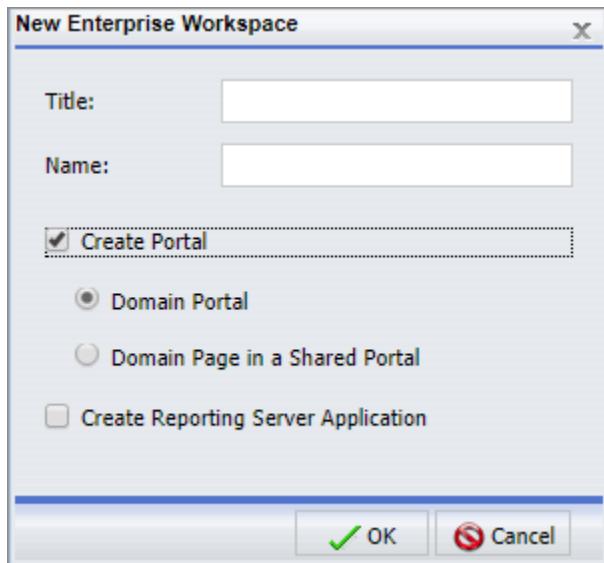
Note: If you cannot create basic portals in your environment, the Create Portal check box is cleared and disabled, by default.

5. Click *OK*.

   A message appears and confirms that the template processing is complete.

6. Click *OK*.

   A new workspace and a portal with the same name appear in the Resources tree.

7. To customize your new portal, under the Portals node, right-click the portal and click *Edit*.

   The Portal Designer opens.

   When you create a portal as part of a workspace, it comes with the following pre-configured pages:

   ❑ Workbench

   ❑ My Page

   The Workbench page can be used to work with workspace content. It displays the Resources tree and report output area. When you run a content item, it appears in the report output area. Multiple content items appear as tabs.

My Page presents you with series of empty containers that you can fill with the content of your choice. You can maximize any of these containers to get a better view of your content.

For more information about workspace templates, see the *TIBCO WebFOCUS® Security and Administration* technical content.

Procedure: **How to Create a Collaborative Portal**

1. Sign in to WebFOCUS.

2. Select the workspace or folder, where you want to create the collaborative portal.

   1. From the Legacy Home Page, point to *New*, and then click *Collaborative Portal*. The New Collaborative Portal dialog box opens.

   2. From the WebFOCUS Home Page, on the Action Bar, click *Collaborative Portal*. The New Portal dialog box opens.

3. Supply the requested information on the dialog box, as follows.

   ❏ **Title.** Value displayed in the tree that users use to identify the portal.

   ❏ **Name.** Type a descriptive name for your portal. The name will be used throughout the WebFOCUS application.

   ❏ **Path.** The path of the portal in the WebFOCUS repository.

   ❏ **URL.** The URL is generated based on the portal name. Another user can enter this URL to access your portal without going to a home page.

4. Once you have completed the fields, click *Create*.

   The portal is created for you, the Resources folder for the collaborative portal is added to the repository, and the Portal Designer opens.

Reference: **Resources Folder**

When you create a collaborative portal, a Resources folder with the same name is automatically generated. The Resources folder is used to store pages for each portal under the workspace. The following image shows the Sales Dashboard Resources folder, which contains the pages for the Sales Dashboard portal, in the Resources tree of the Legacy Home Page. If you are working from the new WebFOCUS Home Page, this folder is visible when you click the workspace in the Workspaces view.
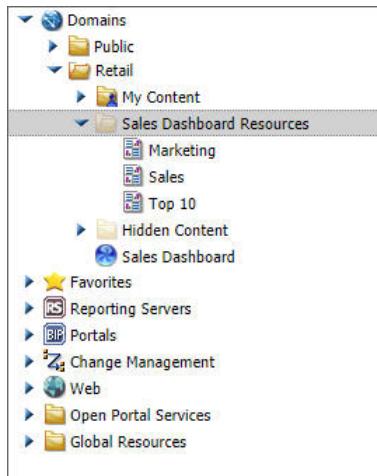
You can also reference pages in a portal from other locations.

Note: Do not delete the Resources folder for a portal that is in use. If you attempt to open a portal with a missing Resources folder, warnings will occur.

Portal Designer Interface

The following image shows the Portal Designer.
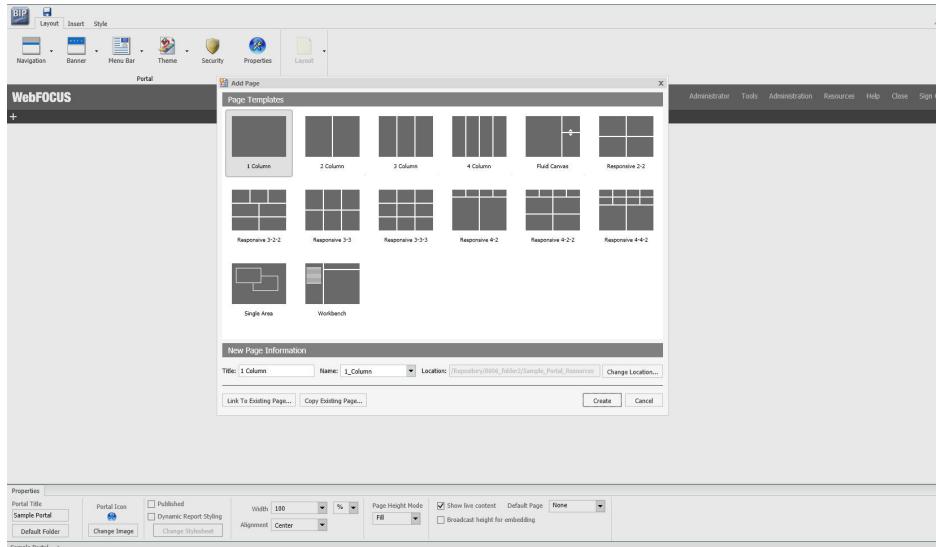
The Portal Designer has the following components:

❏ Page Templates

❏ Application menu

❏ Quick Access Toolbar

❏ Ribbon

❏ Canvas

❏ Properties panel

❏ Breadcrumb trail

These components are described in subsequent topics.

Note: The Portal Designer uses the Neutral theme, by default. You can change this to another theme of your choice from the Administration Console.

Page Templates

Page templates provide a quick way of creating page layouts. When you create a new collaborative portal or portal page, the Add Page dialog box opens and provides layout presets that you can choose from before adding any content. If you have custom templates, they are also shown in this dialog box.

Note: These page templates are only available when you create collaborative portals.

The Add Page dialog box is shown in the following image, and contains the following options:
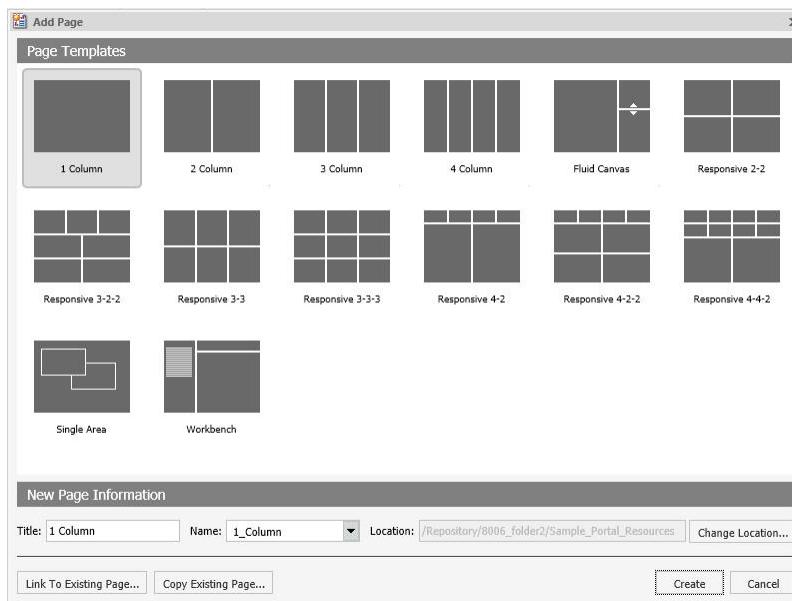
❏ **Page Templates.** Contains custom and default page templates. Each template is accompanied by a thumbnail, which allows you to preview the layout. The default templates are:

   ❏ 1 Column

   ❏ 2 Column

   ❏ 3 Column

   ❏ 4 Column

   ❏ Fluid Canvas

   ❏ Responsive 2-2

❏ Responsive 3-2-2

❏ Responsive 3-3

❏ Responsive 3-3-3

❏ Responsive 4-2

❏ Responsive 4-2-2

❏ Responsive 4-4-2

❏ Single Area

❏ Workbench

❏ **New Page Information.** Provides access to the following options:

❏ **Title.** Identifies the title of the portal page. The default title matches the name of the selected page template.

❏ **Name.** Identifies the name of the portal page. The default name matches the name of the selected page template.

❏ **Location.** The location of the page in the repository. The default location is the Resources folder of the portal. To change the location, click *Change Location* and navigate to a different workspace or folder.

❏ **Link to Existing Page.** Changes the location of the portal page in the repository. To change the location, click *Change Location* and navigate to a different workspace or folder.

❏ **Copy Existing Page.** Creates a copy of an existing portal page in the repository, and adds it to a portal.

Procedure: How to Create a Custom Portal Page Template

Note: You can only create a custom portal page template from the Legacy Home Page.

1. Sign in to WebFOCUS as a developer or administrator.

2. On the Legacy Home Page, in the Resources tree, expand the *Global Resources* folder, and then expand the *Page Templates* folder.

3. Right-click the *Custom* folder, point to *New*, and then click *Portal Page*.

   The Page Designer and Add Page opens.

4. Select a template that you want to use as a base for your custom template, update the Name field, and then click *Create*.

5. Modify your layout.

   In this example, we used the Responsive_3-3 template and added a filter panel to it, as shown in the following image.
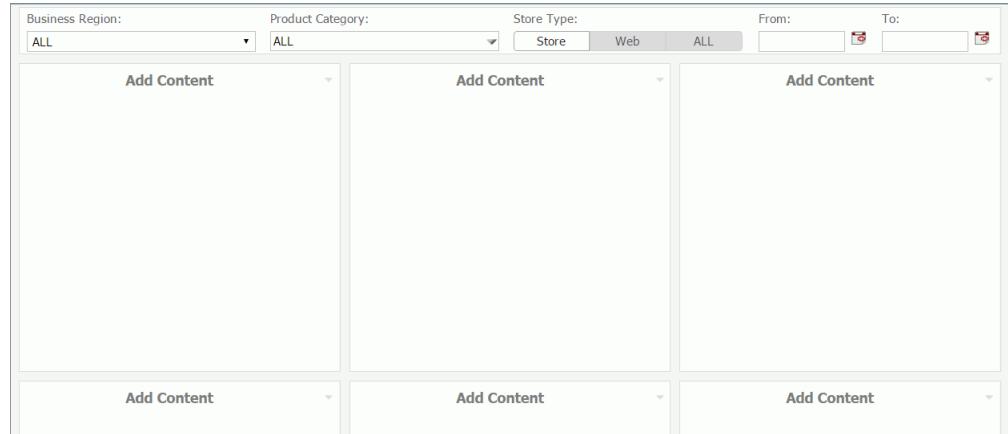
6. Click *Save*, and close the Page Designer.

7. In the Resources tree, right-click your newly created custom page template and click *Properties*.

   The Properties window opens.

8. Locate the Properties value and make a note of the thumbnail image name, as shown in the following image.
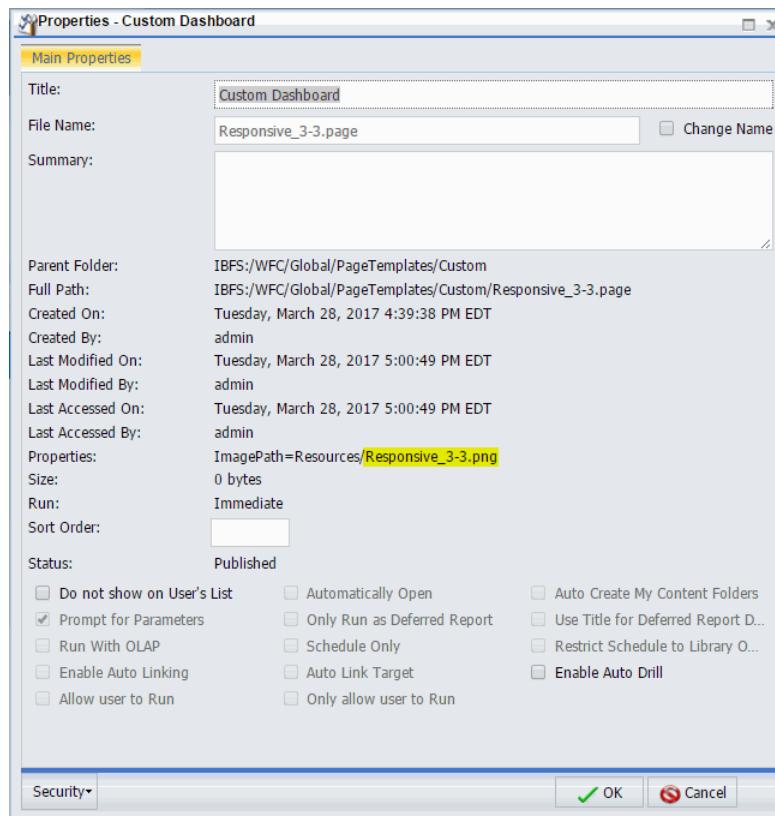
9. Create a custom thumbnail image, resize it to 96 x 72 pixels, and save it with the same name and file extension as the one in the custom template Properties value.

10. In the Resources tree, under the Page Templates folder, right-click the *Custom* folder, point to *New*, and then click *Folder*.

    The New Folder dialog box opens.

11. In the Title field, type *Resources*, and click *OK*.

12. Right-click the folder that you just created, point to *Upload*, and then click *Image*.

    The Image Upload dialog box opens.

13. Upload your custom thumbnail image and exit the Image Upload dialog box.

The correct folder structure, under Global Resources, is shown in the following image.
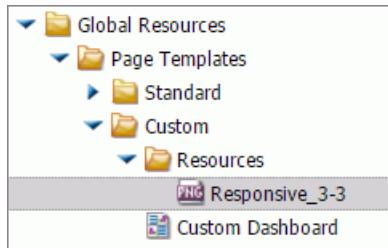
14. In the Resources tree, under the Workspaces node, right-click a workspace or folder, point to *New*, and then click *Page* or *Collaborative Portal*.

    The Designer tool opens and Add Page dialog box opens with the new custom template added to the list, as shown in the following image.
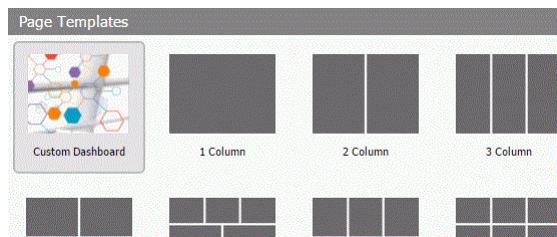
15. With the Custom Template selected, click *Create*.

    The custom template layout displays on the page.

Application Menu

You can access the Application menu through the BIP icon at the upper-left corner of the Portal Designer window.

The menu contains options to:

❏ Create a portal.

❏ Open an existing portal in the Portal Designer.

❏ Save the current portal.

❏ Save the current portal as specified. This option is only available for basic portals.

❏ Exit.

Quick Access Toolbar

The Quick Access Toolbar allows you to save your changes to the current portal.

Ribbon

In the Portal Designer, you can use the ribbon to access commands to edit your portals and add content. You can also hide the ribbon to maximize space or launch the online Help content.

The ribbon contains the following three tabs:

❏ **Layout.** Specifies the portal-level settings and the page and banner layouts.

❏ **Insert.** Inserts an item from a page to a report.

❏ **Style.** Applies styles to common properties such as, background, border, and font.

Layout Tab

The Layout tab for a collaborative portal contains two groups, Portal and Page & Banner. You can use the options in these groups to modify your portal.

Portal Group

The following topics describe the options that are available in the Portal group.

Navigation

You can expand the Choose a Navigation Layout option and choose among:

❏ **None.** Displays no navigation menu.

❏ **Top.** Positions the navigation menu beneath the banner, at the top of the window. This is the default layout.

❏ **Left.** Positions the navigation menu on the left side of the screen, in the left banner.

❏ **Right.** Positions the navigation menu on the right side of the screen, in the right banner.

Banner

A banner is an area that is visible in the portal no matter what page you view. You can choose to have no banner or any combination of top, bottom, left, and right banners.

You can expand the Choose Banner Areas option and choose among:

❏ **Top.** Positions the banner at the top of the window. This is the default area.

❏ **Bottom.** Positions the banner at the bottom of the window.

❏ **Left.** Positions the banner at the left of the window.

❏ **Right.** Positions the banner at the right of the window.

Click each menu option to turn the associated banner on or off.

Menu Bar

The Menu Bar button allows you to use a visual interface to change the location of the links. You can choose from three main locations:

❏ **Top Bar.** Displays the links above the top banner.

❏ **Top Banner.** Displays the links within the top banner. This is the default location, with a right alignment of the links.

❏ **Bottom Bar.** Displays the links below the bottom banner.

The bar options are thin strips, either at the top or bottom of the window. They are always visible, no matter how far down or up you scroll.

In each of the locations, you can choose alignment options. For example, you can align the links to the left, in the center, or to the right.

Theme

Theme launches a menu from which you can customize the theme of your portal. This includes the following:

❏ **Portal Theme Files Browser.** Configures CSS files, by applying a predefined theme. You can also create a custom theme. The default theme is Neutral.

❏ **CSS Editor.** Enables you to edit specific components of the existing CSS theme.

Security

The Security button launches the Security Rules dialog box, where you can specify an audience for the portal and add other designers.

There are four permission sets for portals:

❏ **BIPCreatePortal.** Allows you to create a portal.

❏ **BIPFullControl.** Gives you design access and personalization features on a portal.

❏ **BIPViewAndCustomize.** Provides access to run-time mode only. It saves the position of any content that you rearrange and lets you add new content to your copy of the portal.

❏ **BIPViewOnly.** Does not save anything that you do in run-time mode. One use for this operation is anonymous access.

Properties

The Properties button makes the current portal the selected object. It also sets the Properties panel at the bottom of the Portal Designer window so that it applies to the current portal.

Page & Banner Group

The Page & Banner group has a single Layout option that launches a menu from which you can customize the layout of your canvas or portal. For example, you can choose between a column-based layout or to a fluid layout. In a column-based layout, dragging a panel results in a drop indicator, showing where the panel goes. In a fluid layout, the content automatically fills the page area in equal proportions. You can manually rearrange and nest these elements on the page. The display area changes its size depending on your browser dimensions.

The Page & Banner Group includes the following options:

❏ **Single Area.** Creates a free-flowing area, where there is no grid. This is the default.

❏ **Fluid Canvas.** Arranges content evenly, and redistributes space as more items are added.

❏ **One Column.** Stretches content to fill the entire page area.

Note: This layout is always used to create a responsive portal page. For more information, see *Building a Basic Responsive Portal* on page 111.

❏ **Two Columns.** Divides the page evenly into two columns.

❏ **Three Columns.** Divides the page evenly into three columns.

❏ **Four Columns.** Divides the page evenly into four columns.

When you select any option other than Single Area, any items that you add to the page automatically snap to place in the layout.

Insert Tab

You can use the Insert tab to add containers or content to your portal.

The Insert tab the following:

❏ **Pages.** Adds a new portal page to the portal.

❏ **Containers.** Adds a panel, accordion, tabbed, responsive, or easy selector container.

❏ **Content.** Inserts content, for example, reports, charts, visualizations, documents, and URLs. You can also add images, a Resources tree, a Portal List, and text.

Style Tab

You can use the Style tab to configure the styling of objects, options for the background and borders, as well as fonts and colors of the text.

The Style tab contains the following groups:

❏ State

❏ Background

❏ Border

❏ Font

State

From the State group, you select which of the available states you are styling for an object. The state options include the following:

❏ **Normal.** This is the default state of an object in which an event, such as a hover, is not occurring, or if styling for that event is not defined.

❏ **Active.** This is the state in which the object is currently in use. An example is the background color of the current page tab.

❏ **Hover.** This is the state in which the mouse cursor is resting on the object.

Background

You can use an image, a color, or a combination of options when styling the background of an object.

Image

The Image button is a split button. When you click *Image*, the Open dialog box appears, and you can select an image from your repository. When you click the menu, the Background Image Options open. Here, you can change or remove the image.

Click *Change Image* to launch the Open dialog box. From this dialog box, select an existing image in the repository to use as the background, and click *Open*.

To add a new image, use the Resources tree, and right-click the folder that you wish to place the new image in. Point to *Upload* and click *Image*.

Note: The background image is not visible when the Width option is set to *Responsive*.

Repeat

You can use the Select Background Repeat menu to choose whether or not to repeat the background. The options in this menu include the following:

❏ **None.** Displays the background image only once.

❏ **Everywhere.** Repeats the background image horizontally and vertically. This is the default value.

❏ **Horizontally.** Repeats the background image horizontally.

❏ **Vertically.** Repeats the background image vertically.

Position

You can select a background position using a visual menu if you do not choose to repeat the image on the page. For example, you can position the background image at the bottom of the window, on the right. This feature is similar to Menu Bar positioning.

The default background position is upper-left.

Background Color

The Background Color icon launches the color selection dialog box for setting a page background color. The same icon is used in the Border and Font groups to set the border and font colors, respectively.

Reset Background

The Reset Background icon in the Background group resets the background styling to the theme settings for the currently selected state. The same icon is used in the Border and Font groups to reset those groups.

Border

In addition to color and reset, the Border group has style and width controls.

Style

When you click the Style menu, the Select Border Style menu opens. From this menu, you can choose from nine border styles. This includes None, solid border, dotted border, dashed border, groove border, and more. As you hover over each option, the canvas refreshes with a preview to show the border style.

Width

You can use the Width controls to set the border thickness in pixels (px). If the style is set to none, which is the default for most objects, the Width control has no effect.

Color

The Border Color icon launches the color selection dialog box for setting the Border color.

Reset Border

The Reset Border icon in the Border group resets the border styling to the theme settings for the currently selected state.

Font

You can use the Font group to choose the Font family, modify the size of the font, and apply bold, italic, or underlined formatting.

In addition, the Font group contains:

Color

The Font Color icon launches the color selection dialog box for setting the font color.

Reset Font

The Reset Font icon in the Font group resets the font styling to the theme settings for the currently selected state.

Canvas

The following image shows the canvas of the Portal Designer.
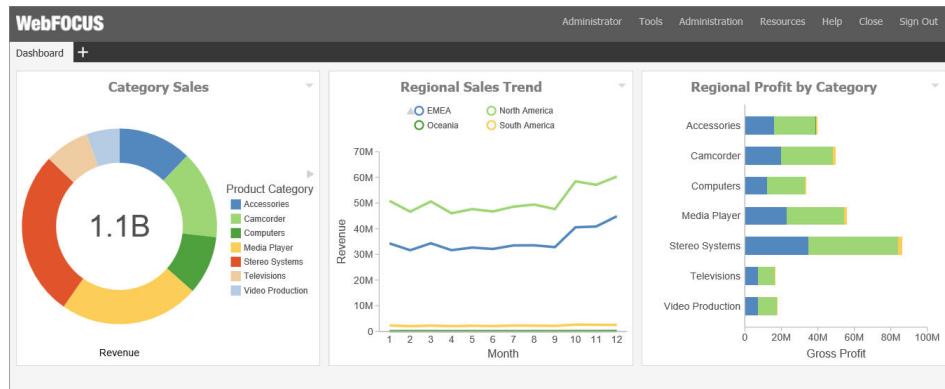
The canvas is the design area, including the banners and pages of your portal. When the portal itself is the selected object, a red outline appears around the entire canvas.

Properties Panel

The Properties panel appears near the bottom of the window, below the canvas. It contains the properties that apply specifically to the currently selected item.

Breadcrumb Trail

The breadcrumb trail appears at the bottom of the window. It serves two purposes:

❏ It indicates the currently selected item.

❏ You can use it to change the currently selected item.

Click any portion of the breadcrumb trail to change the currently selected item. This feature is another way to select an item, in addition to selecting it through the canvas. This feature is especially useful when you are working with hidden or layered content.

Portal Components

A portal is made up of different components, such as a Menu Bar, navigation area, and banner. This topic describes the different components of a portal and their properties.

Portal

The Portal, while not a component itself, does have properties that you can set.

The properties are:

❏ **Portal Title.** This is a unique name that is used to describe the portal throughout WebFOCUS.

❏ **Portal Icon**

  ❏ This is an icon displayed to the left of the portal name throughout WebFOCUS. For example, it appears in the Resources tree.

  ❏ The maximum display size of the icon is 16 x 16 pixels. Upload an image that is visible at that size.

  ❏ Change the portal icon by clicking the preview icon or the *Change Image* button.

❏ **Published.** This check box determines whether or not the portal is ready for others to use. When this box is checked, the portal is live for anyone who has been given access to it.

❏ **Dynamic Report Styling.** When this property is enabled, all reports that run within the portal inherit their styling from the portal. Each portal theme has a default WebFOCUS StyleSheet (.sty file). You can choose from any of the StyleSheets, as well as create and apply your own.

❏ **Width.** This is the width of the portal. You can set it as default, auto, responsive, or specify a percentage or number of pixels. By default, the width is set to 100%.

❏ **Alignment.** When the width is not 100%, you can choose how to align the content (left, center, or right). Center is the default alignment.

❏ **Page Height Mode.** You can choose from one of two different page height modes.

  ❏ **Fill (default).** The page takes up 100% of the viewable space in your browser. If there is more content than can fit in that space, the page area will scroll, but the top and bottom banner (if enabled) will always be visible. Use this when you want to make the complete site, including the banners, visible.

  ❏ **Auto.** The page height is set to that of the page content. In this mode, the banners scroll with the page content. Use this feature when you want pages to grow as the user adds content.

❏ **Summary.** This is an optional explanation of the portal. It is displayed in the tooltip of the portal tree when the mouse hovers over a portal.

❏ **Show live content.** This check box allows content to change in real time.

❏ **Broadcast height for embedding.** Enables a third-party web application to embed the portal content and display it correctly within a responsive layout.

❏ **Default Page.** Selects the page that the users see upon their login to the portal.

> **Note:** If set to *None*, all users, upon their first login to the portal, see the page that was viewed by the WebFOCUS Designer at the moment of saving a portal. Upon subsequent logins, users with portal customization privileges will see the last page that they viewed at run time. This behavior is especially useful when you need to show a specific page to users once, for example a disclaimer or a tutorial.

Menu Bar

The Menu Bar is the collection of links found either in the top banner, or in the top or bottom bar.

The Menu Bar has the following properties:

❏ **Location.** Works just like the Menu Bar button on the ribbon.

❏ **Margins.** Used to fine-tune the Menu Bar position. You can adjust the Menu Bar horizontally (left or right) or vertically (top or bottom). The labels and choice of units (pixel or percentage) vary, based on the starting position. The vertical option is disabled when the Menu Bar is in the top or bottom bar. The vertical and horizontal options are disabled when the location is middle and center, respectively.

❏ **Separator.** Color of the vertical bar between items.

❏ **Items.** List of available and selected options.

❏ **Max Items.** Maximum number of items to show in the Menu Bar. Any additional items become the sub-items of an option labeled *More*.

❏ **Theme.** The *Theme* button and check box become active when you add *Theme* from the Available list to the Selected list, and allows you to select the themes that will be in the Menu Bar drop-down list.

❏ **Refresh content on theme change.** If enabled, refreshes all content items on the page to reflect a new theme.

Navigation

The Navigation area is located on top of pages. The properties panel for this component lets you choose if the Style tab is styling the Buttons or the Area (non-button space in the Navigation section).

Additionally, the following are the properties of the navigation area:

❏ **Hide New Page.** Removes the option to create a new page at run time, when it is selected.

❏ **Hide Link to Page.** Removes the option to add a linked page at run time, when it is selected.

Note: If the Hide New Page option is enabled and the Hide Link to Page option is disabled, the run-time New Page button opens the Open dialog box, where you can link to an existing page. If the Hide Link to Page option is enabled and the Hide New Page option is disabled, the run-time New Page button opens the Add Page dialog box. The Link to Page button is not displayed in the Add Page dialog box. If both Hide New Page and Hide Link to Page options are enabled, the New Page icon is not displayed in the navigation area at run time.

Banners

Banners are areas that are visible above the pages of the portal.

The following are the properties of a banner.

❏ **Height.** Set in pixels or as a percentage.

❏ **Lock Banner.** Turns off customization of the banner. Customization includes changing the height and visibility settings.

❏ **Collapsible.** Allows optional visibility at run time. If this check box is selected, the banner becomes collapsible, allowing you to expand the display area of the portal. To hide or reveal a banner at run time, click the collapsible banner indicator, as shown in the following image.
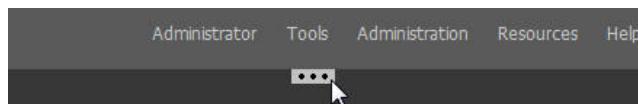
Portal Pages

Portal pages are the main content area of a portal. The default page, when a user loads the portal, is the portal page that was visible in the Portal Designer when you last saved the portal. You can rearrange portal pages using a drag-and-drop operation.

The page title has a shortcut menu that can be used to rename, rearrange, change the page layout, delete the page, add a new page, or access hidden content on the page. Right-clicking the page itself displays the Page Layout and Hidden Content option.

The following are the properties of a page.

❏ **Title.** Identifies the title or label shown in the navigation menu and any tree that lists pages in a portal.

❏ **Page Icon.** Works just like the portal icon, except that you can turn it on or off. It is disabled, by default.

Note: You can upload a custom image of any size for a portal page icon. Larger images can be used for side navigation on the Legacy Home Page and as buttons on mobile devices. Changing the portal page icon in the Properties tab of the Portal Page Designer does not change the default icon that displays on the WebFOCUS Home Page.

❏ **Change Image.** Allows you to select a different image for the icon.

❏ **Lock Page.** Turns off customization on the portal page. Customization includes moving content and adding content.

Note: The Lock Page check box is selected by default. Clear it to grant permission to end users for moving and adding content.

❏ **Refresh on Click.** Refreshes the portal page when you click the page title. This feature is useful if another portal page changes the parameters used by the reports on this page. When you switch back, the reports rerun with the appropriate parameters.

❏ **Show in Navigation.** Used to hide the portal page from the navigation. You can use this property to create a home page for a portal that displays the first time that a user runs the portal, but the user cannot navigate to it again.

❏ **Prevent Layout Change.** Restricts layout changes on unlocked portal pages at run time. This option is only active when the Lock Page option is disabled.

Note: In a collaborative portal, this behavior varies depending on the template that you choose. For the columnar layouts, Fluid Canvas, and Single Area, the Prevent Layout Change check box is clear by default. This gives users the freedom to switch between these layouts at run time. For all responsive layouts, the Prevent Layout Change check box is selected, by default, to prevent users from breaking the template and impairing the responsive function.

❏ **Relative Path.** References a specific path for the content that was added to a portal page and allows you to move the page or the portal in the repository without losing any content or resources. This option is only available for collaborative portals.

❏ **Show Refresh.** If enabled, displays the Refresh option in the portal page menu at run time.

❏ **Margins.** Sets page margins in pixels or as a percentage. Use the Same for All option to set equal margins on all four edges of a portal page.

❏ **Comments.** Controls the placement of the comments on a portal page. The options include: none, top, bottom, left, and right. This option is only available for collaborative portals.

❏ **Container Defaults.** Opens the Container Defaults dialog box, where you can set a default size, appearance, and list of behaviors for all containers on a portal page.

❏ **Summary.** Appears in a tooltip when you are exploring the portal in a tree. Applies to the portal page.

❏ **Page Name.** Sets a descriptive name of your portal page. The name is used throughout the WebFOCUS application.

Columns

Columns can be found in both banners and portal pages. Columns have the following properties:

❏ **Column Number.** A label that indicates the column that is selected on the portal page.

❏ **Width.** Set in pixels or as a percentage.

❏ **Lock Width.** Prevents a designated column width from being changed at run time. This option is only active if the column width is set in pixels or as a percentage. It is disabled when the column width is set to Auto.

❏ **Container Padding.** The space between either container and the column edge (left and right of each container, the top of the first container, and the bottom of the last container) or each other (vertical space between each container). These work like page margins, but are set only in pixels.

❏ **Freeze Column.** Prevents users from adding content to the column or any of the containers inside this column at run time. It also prevents users from removing any content or containers from this column at run time. This option is not available when the Lock Page option is selected.

❏ **Show Easy Selector.** Activates the Easy Selector function at run time.

❏ **Select Folder.** Opens the Browse For Folder dialog box, where you can select a folder that is available from the Easy Selector option at run time.

Logo

The Logo is found in the top banner of the portal. By default, a WebFOCUS logo appears. You can replace it with your own logo or remove it completely.

A logo has the following properties:

❑ **Reset.** Click the reset 🔄 icon to reset the logo.

❑ **Show Logo.** Clear the check box to hide the logo.

❑ **Change Image.** Click *Change Image* to select your own logo.

❑ **Logo Size.** Set the logo size in pixels or as a percentage. Click the lock icon to lock the aspect ratio (changing the width changes the height proportionately and vice versa).

❑ **Location.** Position the logo in the top banner. This feature works just like the background positioning on the Style tab.

❑ **Margins.** Used to fine-tune the image location. Works just like the Menu Bar margins.

Containers

There are five types of containers. They are:

❑ **Panel.** A simple container that can hold a single piece of content.

❑ **Accordion.** A compound container that can hold one or more pieces of content. It uses accordion panes to switch between the content.

❑ **Tabbed.** Similar to the accordion, but uses tabs to switch between the content.

❑ **Responsive.** A compound container that responds to the layout changes based on the size of the browser or device.

❑ **Easy Selector.** A simple container that a flexible way of adding content to a portal at run time without opening the Resources tree.

Panels

The panel container holds a single piece of content, as shown in the following image.
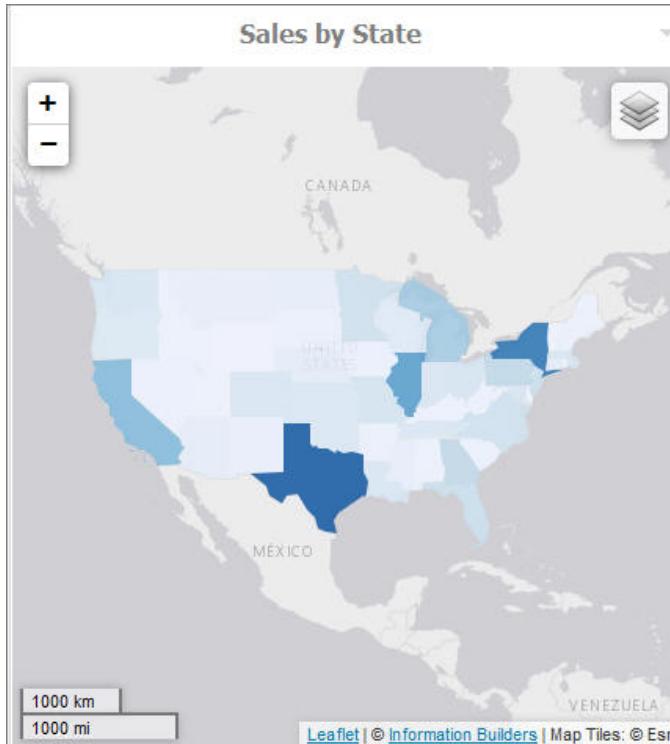
The panel consists of three sections:

❏ Overall panel

❏ Title Bar

❏ Content Area

If you hover over a panel, the Change Panel Type button appears, as shown in the following image.
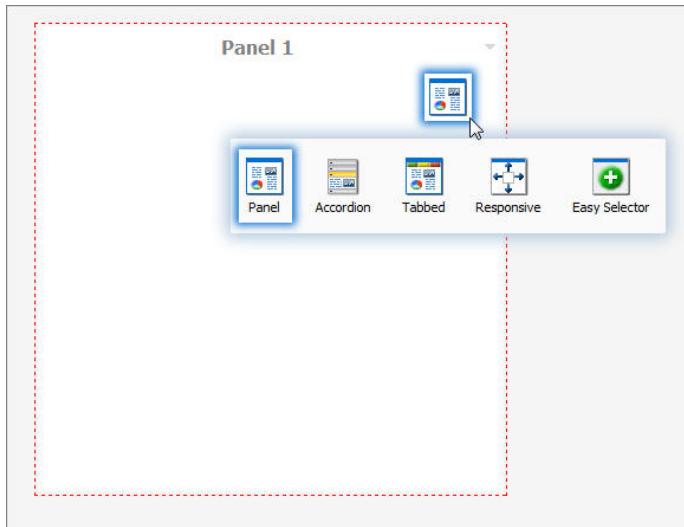
This button opens a menu, where you can select a different type of panel.

Note: When adding pages created in the WebFOCUS Designer, the Change Panel Type button opens over the Refresh and Filter options for the page. However, when you run the portal or portal page, these options are accessible.

To change the title of the panel, right-click the title bar and click *Change Title*, as shown in the following image.

Panel Properties

The properties for all panel types are:

❑ **Properties Tab.** Contains the properties that apply to the panel.

   ❑ **Size.** In a single area layout, this is both height and width in pixels. In column-based layouts, this is height only. You can set the height, in pixels, to Auto, Dynamic, or a numeric value. The Dynamic height option is only available when you use a responsive container.

❏ **Responsive Properties.** Opens the Responsive Panel Properties dialog box, where you can edit the layout of the responsive container.

❏ **Behaviors.** You can configure how the panel behaves. By default, all options are on. The options that require a menu click are available by hovering over the title bar and accessing the menu at the upper-right (in accordion and tabbed containers, each area has a menu as well). The options are:

❏ **Move.** If selected, allows you to move a panel on a page at run time.

❏ **Resize.** If selected, allows you to resize a panel at run time.

❏ **Minimize.** Adds the Minimize option to the panel drop-down menu.

❏ **Maximize.** Adds the Maximize option to the panel drop-down menu.

❏ **Refresh.** Adds the Refresh option to the panel drop-down menu.

❏ **Hide.** Adds the Hide option to the panel drop-down menu.

❏ **Delete.** Adds the Delete option to the panel drop-down menu. When a user deletes a panel, they delete it only from their version.

❏ **Show Comments.** Displays comments on a panel, and adds the Show/Hide Comments option to the panel drop-down menu, if selected. This option is only available for collaborative portals.

❏ **Appearance.** You can control the following options:

❏ **Hide Panel.** When this option is selected, the panel is not initially visible. The user can add it by clicking *Hidden Content* in the page shortcut menu or the Menu Bar. You can use the Hidden Content feature to give the user a choice of widgets to view on their page.

❏ **Freeze Container.** Prevents users from adding content to and removing content from the container at run time. This option also restricts any interaction with the container at run time except minimizing, maximizing, and restoring the panel to its original size. This option is not available when the Lock Page option is selected.

❏ **Show Easy Selector.** Activates the Easy Selector function at run time.

❏ **Select Folder.** Opens the Browse For Folder dialog box, where you can select a folder that is available from the Easy Selector option at run time.

❏ **Title Tab.** Contains the properties that apply to the title bar of the panel.

  ❏ **Title.** This is the text displayed in the title bar. When you add content, it automatically changes to the current title of that content. You can edit this field to override the automatic change.

  ❏ **Panel Icons.** Works just like the portal and page icon, except that you can turn it on or off. It is disabled by default.

  ❏ **Change Image.** Allows you to select a different image for the icon.

  ❏ **Appearance.** You can control the following options:

  ❏ ❏ **Hide Title Bar.** You can hide the title bar to save space. This feature is very useful when you have only a single piece of content on a portal page.

    ❏ **Show Menu Icons.** Determines whether the icons that display with the options in a container shortcut menu are visible.

❏ **Content Tab.** Contains the properties for a content item that is displayed inside the panel.

  ❏ **Content Area.** The properties for the Content Area differ based on the type of content. A blank panel has a blank properties panel.

  ❏ **Auto Refresh.** If enabled, refreshes the content automatically. This property is off by default. When it is enabled, the default time is 30 seconds.

  ❏ **Dynamic Report Styling.** When Dynamic Report Styling is enabled at the portal level, this box is checked for a piece of content by default. To disable Dynamic Report Styling for a specific piece of content, clear this option.

❏ **Tabs/Areas Tab.** Contains the properties that apply to tabs and areas. This tab is only visible in the properties panel of a tabbed or accordion container. Here you can style different areas of the container by selecting *Buttons* or *Bar*. You can also hide the new tab button from a tabbed container, or the new area button from an accordion container, to restrict adding more tabs and areas to this container at run time.

Accordion Container

The accordion container can hold more than one piece of content, as shown in the following image.

In the preceding image, notice how the chart fits perfectly in the container. WebFOCUS InfoAssist has an option to AutoFit charts. When enabled, it accepts the sizing from the portal. This prevents the person who develops the chart and the person who uses it from having to coordinate sizing. Additionally, you can easily resize the container and see the entire chart.

The title bar and content area properties are the same. The overall properties have an additional section labeled Area.

In the Area section, you can use the icons in the order in which they appear to add, rename, delete, and reorder the areas. You can also create a new area using the New Area bar in the container or delete containers using the menus. You must use the Properties panel to rename or reorder the areas.

Note: When you click the New Area bar multiple times to add new areas, you may need to resize the container to view the bar, as it could be covered by newly created areas.

There is also an additional Properties panel, the Pane Title Bars, which is accessible only through the breadcrumb trail. This feature lets you style the title bars of the areas. They are all styled together, but you can style the different states to distinguish the currently active one from the one on which the mouse pointer is resting.

Tabbed Container

The tabbed container can hold more than one piece of content, as shown in the following image.

Panel 1					
30 Day Sales Trend ▾	Sales By Product ▾	Stores ▾	Customers ▾	New Tab	
Subcategory	Gross Profit	Discount	MSRP	COGS	Qty
Blu Ray	$51,771,195	$10,895,633	243,779,705	$181,112,921	679,495
Speaker Kits	$25,819,242	$4,954,243	112,169,618	$81,396,140	244,199
Headphones	$24,523,024	$3,516,913	79,703,501	$51,663,564	228,349
Handheld	$21,393,655	$1,959,624	43,930,192	$20,576,916	250,167
Standard	$19,369,668	$3,214,787	71,656,083	$49,071,633	192,205
Video Editing	$17,947,620	$2,695,891	60,749,162	$40,105,657	199,749
Tablet	$17,674,116	$2,018,135	45,464,132	$25,771,890	146,728
Receivers	$16,555,836	$2,643,045	59,528,536	$40,329,668	150,568
Flat Panel TV	$15,885,499	$3,478,829	78,441,670	$59,077,345	92,501
Smartphone	$15,834,702	$2,790,776	62,661,241	$44,035,774	205,049

The tabbed container has all the same properties as the accordion container. Instead of the Pane Title Bars properties, it has a property panel called Tab Bar. You can access this property panel by clicking it.

Unlike the Pane Title Bars, it is not blank. You can choose to style the buttons or the bar. This feature is similar to styling the Navigation buttons versus the Navigation area.

Responsive Container

The responsive container is designed to help you build a responsive portal that automatically adapts to different screen sizes and mobile devices, providing an optimal viewing experience for users everywhere. You can build your responsive portal on your desktop, and make it available to users on different platforms. The following image shows an example of a responsive portal displayed on a desktop, tablet, and smartphone.

The responsive container intuitively changes its layout when you change the size of your browser. The default width and height of the container, and the inserted items, are pre-configured to offer the best positioning of the elements on the screen. You can manually change the dimensions of the items in the Responsive Item Properties dialog box. You can also change the layout options in the Responsive Panel Properties dialog box.

Responsive Item Properties

The Responsive Item Properties dialog box provides options to change the dimensions of an individual item within the responsive container. You can access the Advanced Responsive Item Properties dialog box at design time by clicking the *Responsive Properties* button in the property sheet.

The properties for a responsive item are:

❑ **Custom CSS Classes.** Enables custom CSS classes for the item.

❏ **Width.** Defines the width of the item.

❏ **Height.** Defines the height of the item.

❏ **Margin.** Defines the space between the adjacent items.

❏ **Shrink.** Defines the ability of the item to shrink if necessary.

❏ **Grow.** Defines the ability of the item to grow if necessary.

❏ **Basis.** Specifies the initial size of the item, before any available space is distributed according to the responsive factors.

❏ **Minimum Width.** Sets the minimum width of the specified element. This setting overrides the Width setting.

❏ **Maximum Width.** Sets the maximum width of the specified item. This setting overrides the Width setting.

❏ **Minimum Height.** Sets the minimum height of the specified item. This setting overrides the Height setting.

❏ **Maximum Height.** Sets the maximum height of the specified item. This setting overrides the Height setting.

❏ **Self Align.** Provides access to the following options:

    ❏ **Auto.** Intuitively places the item in the best available space inside the responsive container.

    ❏ **Start.** Aligns the item to the left side of the responsive container.

    ❏ **End.** Aligns the item to the right side of the responsive container.

    ❏ **Center.** Aligns the item to in the center of the responsive container.

    ❏ **Stretch.** Stretches the item to fill the available space inside the responsive container, while respecting width and height constraints.

    ❏ **Baseline (text).** Aligns the baseline of text inside the responsive container.

Note: In a responsive portal, setting fixed dimensions for items is not recommended, because the viewport width and height continually change from device to device. Responsive layouts need to adapt to this change, whereas fixed dimensions create too many constraints. For this reason, you must only set a range between minimum and maximum width and height, defining an amplitude with which the item can vary in size.

Easy Selector Container

The easy selector container provides a simple way to add content to a portal at run time, without opening the Resources tree. It also gives you the option to control which items users can access. When you insert an easy selector container into a page at design time, the Browse For Folders dialog box opens, as shown in the following image. Here, you can select a folder that users can access at run time.
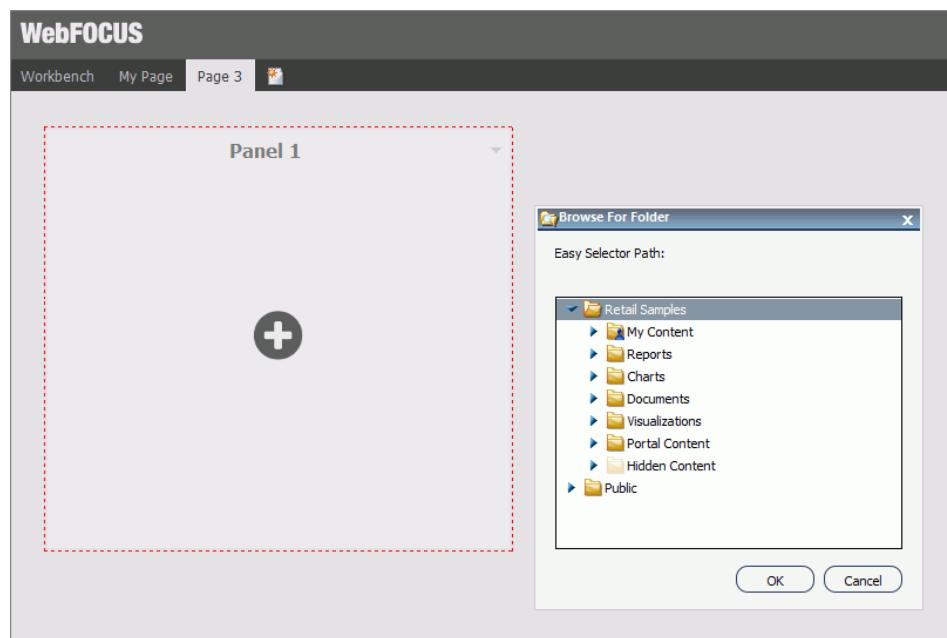
To change a target folder, click the *Change Folder* button in the Properties panel.

Content

You can add content to a portal in a few ways. The first way is to use the ribbon. Navigate to the Insert tab and choose a type of content in the Content group. The second way is to insert a blank panel, area, or tab, and use the WebFOCUS Resources option to populate it. The Resources tree opens, allowing you to drag content into the portal.

Note: When you click and drag one or multiple resources or folders from a tree to a blank page, a tabbed container is created, showing each resource. For more information, see *Tabbed Container* on page 89.

The other four options (Image, Resource Tree, Portal List, and Text) place their content in the content area that is selected, if applicable. Alternatively, they create a new panel with the content in the current page or banner that you are on.

When you add Insight-enabled content to a portal page, it will run as a standard HTML5 chart. An Explore with Insight icon displays, as highlighted in the following image.
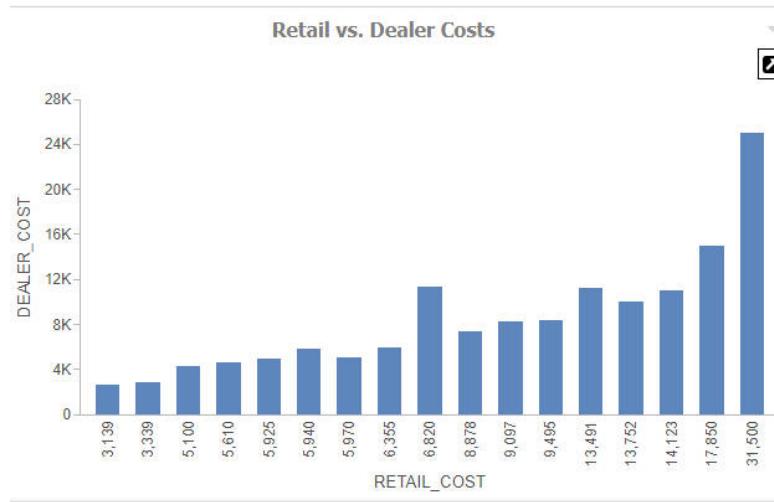
You can view the content in Insight mode by clicking the Explore with Insight icon. Content opens in a new browser tab.

TIBCO WebFOCUS Resources

The WebFOCUS Resource option opens the Resources tree on the right-hand side of the window. The tree shows you the content stored in the WebFOCUS Repository. You can access this content in the Content section of the tree. Alternatively, you can find a resource that you marked as a Favorite.

Depending on security, you may also have access to the WebFOCUS Reporting Servers section to manage metadata. You cannot insert a report that is stored on the WebFOCUS Reporting Server into a portal.

The Resources tree is docked on the right. When it is docked, you can keep it open, close it, or unpin it so that it collapses to the side. The Resources tree is shown in the following image.
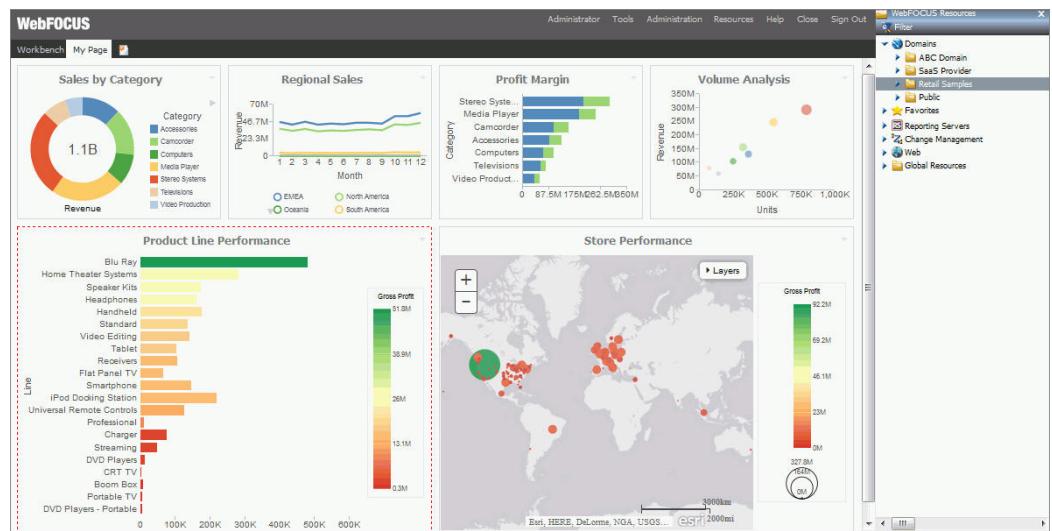
URLs

A URL is a link to a website. To create one, right-click a folder in the Content section of the tree, point to *New*, and click *URL.* In the Create URL dialog box that opens, type a display title, a file name, and the URL itself. Optionally, you can provide a summary that is displayed in a tooltip when the mouse pointer rests on the URL in the tree.

If you insert a URL inside the portal, be aware that some sites may not work, as their owners may not allow them to run inside a frame. Internet Explorer will show a message. Firefox® and Chrome™ browsers display just a blank frame.

Resources Tree

You can insert a Resources tree to allow users to perform activities such as run content, create content, and schedule content. In addition to the tree nodes shown in the pop-out tree, you can also choose to show a node named Portals, which lists all the portals that the user can access.

Note: If you place a Resources tree into a column (which is a percentage of the whole horizontal size), it cannot be resized.

Click the *Filter* button to access the Filter option. The Filter feature is not a search feature. To access search, right-click the Workspaces node or any folder in it, and click *Search*. As you browse through the tree, the filter returns only items that meet the filter criteria.

Note: Folders published from the WebFOCUS Portal Designer or Portal Page Designer display as published in the panel, but display as private in the Resources tree on the Legacy Home Page. Refresh folders in the Resources tree to display them as published.

When the Resources tree is placed inside a panel, the following properties display in the Properties panel, in the Content tab:

❑ Resources tree

From the following list, choose which sections of the tree to show:

❑ Filter

❑ Content

❑ Favorites

❑ Reporting Server

❑ Portals

❑ Change Management

By default, all sections are enabled. The enabled sections appear for any user that has security access to those sections. A portal designer can deny access to a section by hiding it, even from a user who has access, but a designer cannot grant access to a user who does not have access.

❑ **Hide Scrollbar.** When selected, this option removes the horizontal scrollbar from the Resources tree. This feature improves usability of the component at run time and on mobile devices.

❑ **Run Location.** You can choose to run content in a window or in a panel in the portal. WebFOCUS Reporting Server content always runs in a new window.

When the first option is set to *Window*, there is a second option named Window, giving you the ability to choose a New Window or name the window in which to run.

When the first option is set to *Panel*, you can choose to create a new panel, accordion, or tabbed container, as well as choose from one of the existing content areas on the page. In the case of an existing accordion or tabbed container, choosing the title of the container itself creates a new area or tab in that container. Choosing an existing area replaces that area.

Note: If the Freeze Container option is selected on the target panel, the content will still run, but all additional changes to that panel will be restricted.

Portal List

To create a portal listing, either insert a Resources tree and show only the Portals section, or insert a Portal List. The difference is that in a Resources tree, the shortcut menu options are available for each portal and for the Portals node, while in a Portal List they are not available. Also, in the Resources tree the Portals section is not expanded, by default, while in a Portal List, it is expanded.

The Portal List has properties that display in the Content tab of the Properties panel, such as:

❏ **Portal List.** Allows you to change the name of the panel, in which the Portal List is displayed.

❏ **Hide Scrollbar.** Removes the horizontal scrollbar from the Resources tree, when selected. This feature improves usability of the component at run time and on mobile devices.

Text

The last type of content is text. The text area is simple to use. All styling is applied to all the text. You cannot style individual words or characters.

The text area has no properties other than the content type and the Area ID.

Chapter 4

Customizing and Running Portals

After creating a portal, you can customize and rearrange portal pages, configure responsive behavior or the Easy Selector, translate content, and more. This topic provides information about customizing and interacting with a portal.

In this chapter:

Running a Portal

When users run a portal, they have either view-only access or the ability to customize a portal and its content. If they have the ability to customize, all actions are saved as they are performed unless a portal page is locked. For example, any time they move content around, the new positions of the content are saved. Any content added, hidden, or removed is saved as well.

New portal pages are saved, too. If the Portal Designer adds or removes portal pages or content, the user sees this, along with their customization each time that they load the portal. They lose their customization only if a portal page that they have customized is deleted by the Portal Designer or if they use the Remove My Customizations option. To learn more about removing customizations, see *Removing Customizations* on page 106.

When working with a collaborative portal, users can create an alias and run a portal from a specific URL. This feature prevents collaborative portal URLs from becoming unnecessarily complicated.

Note: Only administrators can create aliases, because they have the ability to see across workspaces and can prevent conflicts.

You can also create and share a URL to a specific page in a portal allowing users to navigate to it directly. This feature is especially useful in a portal with multiple portal pages or as a way to supersede the Default Page setting.

*Procedure:* How to Manage and Use an Alias in a Collaborative Portal

1. Access the Manage Alias option in one of the following ways:

   ❏ On the Home Page, in the Content view, in the Resources tree, right-click a collaborative portal, and then click *Manage Alias*.

   ❏ On the Home Page, in the Portals view, right-click a collaborative portal, and then click *Manage Alias*.

   ❏ On the Legacy Home Page, in the Resources tree, right-click a collaborative portal, and then click *Manage Alias*.

   The Manage Alias dialog box opens.

2. In the Alias field, type the alias you want to use for the portal URL.

   The Alias URL entry updates with the name of your alias, as shown in the following image.
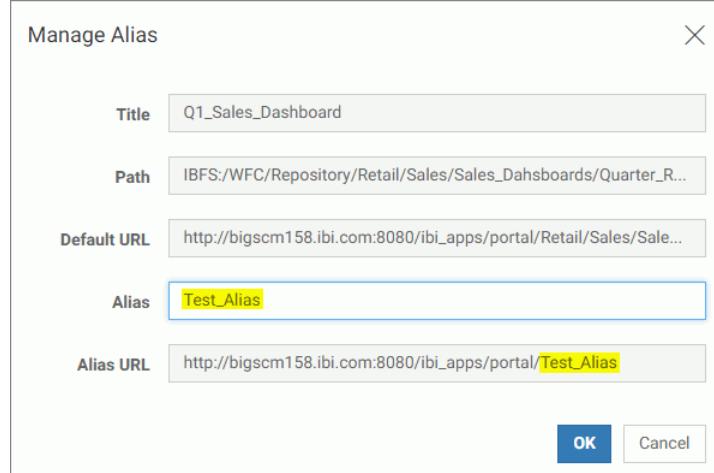
3. Copy the Alias URL.

Note: To copy an inactive field, select an entry and press CTRL+C on your keyboard.

4. Click *OK*.

5. Paste the alias URL in a new browser window and run it.

    The portal runs from the alias URL.

Procedure: **How to Target a Specific Portal Page While Running a Portal**

1. Create a portal as described in *Creating a Portal* on page 60.

2. In the Portal Designer, create a portal page to which you want to navigate directly, and make a note of its name.

    The Page Name field can be found in the following locations:

    ❑ **Basic Portal.** In a page properties panel.

    ❑ **Collaborative Portal.** In the New Page Information section of the Add Page dialog box.

3. Save and close the portal.

4. In a desktop browser, type one of the addresses below.

    For a basic portal:

    `http://server:port/ibi_apps/bip/portal/Portal_Name?page=page_name`

    For a collaborative portal:

    `http://server:port/ibi_apps/portal/Portal_Name?page=page_name`

    where:

    `server`

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

    `port`

      Is the port number on which the server is listening.

    `Portal_Name`

      Is the name of your portal.

      Note: You can find the name of a portal by hovering over this portal in the Resources tree and viewing the tooltip.

    `page_name`
      Is the name of your designated portal page.

The portal runs, and the portal page that you specified displays.

Working With Portal Pages

Portal pages are a vital part of the BI Portal architecture. Basic and collaborative portals allow different levels of versatility in the way you organize and interact with portal pages. In a basic portal, pages are a part of the portal structure and can only be used inside a specific portal. In a collaborative portal, pages become part of the content structure, and you can share, reuse, link, copy and move them between different portals, workspaces, or folders.

There are two types of pages in a portal. These include:

❑ **Base Portal Page.** Created at design time by a developer or administrator. If a base portal page is unlocked, users can customize it at run time. If the user removes customizations or the administrator removes all user customizations from the portal, all changes made by the user are removed, and the base portal page reverts to its default state. The visibility of the base portal pages is controlled by the security rules of the workspace or portal.

❑ **Personal Portal Page.** Created at run time by the user. Personal portal pages are stored in the repository but they are not visible in the Resources tree. If the user removes customizations or the administrator removes all user customizations from the portal, all personal portal pages are removed. Personal portal pages are only visible to the user that has created these pages.

In a collaborative portal, you have additional ways of accessing portal pages. These include:

❑ **Linked Portal Page.** Linked to a portal at design time or run time from the repository. If the portal page is linked at design time, its behavior is similar to the base portal page. If the portal page is linked at run time, it behaves like a personal portal page. In both cases, all customizations that are made to a linked portal page in a portal do not affect the original portal page in the repository. If the original portal page is edited or deleted from the repository, this change is reflected in the linked portal page in the portal. If the linked portal page is removed from the portal, the original portal page remains in the repository. Linked portal pages are only available for collaborative portals.

❑ **Copied Portal Page.** Copied from the repository. Copied portal pages are custom versions of a page, with no link to the original page in the repository. Copied portal pages can be added both at design or run time. If a copy of a portal page is added to a portal at design time, it behaves like a base portal page. Conversely, if a copy of a portal page is added to a portal at run time, it behaves like a personal portal page. Copied portal pages are only available for collaborative portals.

❑ **Stand-alone Portal Page.** Created with the Page Designer directly in a workspace or folder. A stand-alone portal page can be copied or linked to a portal. If a portal page is unlinked from a portal, it becomes a stand-alone portal page and can be reused in a different portal.

Note: To avoid unwanted behaviors, you should not edit portal pages in the Portal Designer or Page Designer, or move or unlink portal pages in the repository, while users are running the affected portals.

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

1. Create a new portal.

   If you create a new collaborative portal, you must select a page template in the Add Page dialog box.

2. In the Portal Designer, add content to the page.

   If left blank, panels behave like Easy Selector containers at run time. To learn more about the Easy Selector, see *Using the Easy Selector* on page 107.

3. Optionally, lock the page to prevent run time edits. Select the *Lock Page* check box in the Properties panel.

4. Save and close the Portal Designer.

   A new portal and base portal page are created.

   To add a new base portal page to an existing portal, edit the portal, and add a new portal page.

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

1. Run an existing portal.

   ❑ From the Legacy Home Page, in the Resources tree, right-click an existing portal, and then click *Run*.

   ❑ From the WebFOCUS Home Page, in the Explorer, right-click an existing portal and then click *Run*.

   The portal opens in a new tab or browser window depending on your browser configuration.

2. Click the *New Page* icon, which is the last item in the navigation bar.

   In a basic portal, a new portal page and the WebFOCUS Resources tree open, so you can start adding content to the new portal page.

   In a collaborative portal, the Add Page dialog box opens, allowing you to choose a template for your new portal page. Once you select a template and click *OK*, the new portal page opens.

You can rearrange your personal portal pages using drag-and-drop operations. Your personal portal pages always come after any base portal pages that were created using the Portal Designer. You can also rename, rearrange, refresh a portal page, or delete a portal page using the shortcut menu options.

Procedure: **How to Link a Portal Page to a Collaborative Portal**

1. Run a collaborative portal.

2. Link to an existing portal page in one of the following ways:

   ❏ From the Add Page dialog box.

      1. Click the *New Page* icon.

         The Add Page dialog box opens.

      2. Click *Link To Existing Page*, as shown in the following image.

         The Open dialog box opens.

   3. Select a portal page to which you want to link and click *Open*.

         The new linked portal page displays in the portal.

   ❏ From the WebFOCUS Resources tree.

      1. On the Menu bar, click *Resources*.

         The WebFOCUS Resources tree opens.

      2. Select a portal page and drag it onto the Navigation bar, as shown in the following image.
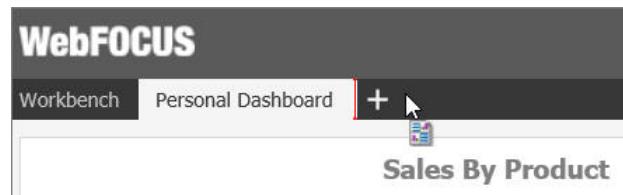
         The new linked portal page displays in the portal.

3. Optionally, customize the portal page to fit your needs.

   Your customizations are visible to you and will not affect the original portal page in the repository. You can remove the linked portal page from the portal by clicking *Remove* in the shortcut menu. If the original portal page in the repository is edited or deleted, these changes affect the linked portal page in your portal.

   If you add a linked portal page at design time, it becomes a base portal page.

Procedure: **How to Add a Copy of a Portal Page to a Collaborative Portal**

1. Run a collaborative portal.

2. Click the *New Page* icon.

   The Add Page dialog box opens.

3. Click *Copy Existing Page*, as shown in the following image.

   The Open dialog box opens.

4. Select a portal page and click *Open*.

   A copy of the portal page, and the associated Title opens in the Add Page dialog box.

5. Click *Create*.

   The copy of a portal page displays in the portal.

6. Optionally, customize the portal page to fit your needs.

   Your customizations are visible to you and will not affect the original portal page in the repository. You can delete the copied portal page from the portal by clicking *Delete* in the shortcut menu. If the original portal page in the repository is edited or deleted, these changes will not affect the copy of that portal page in your portal.

   If you add a copy of a portal page at design time, it becomes a base portal page.

Procedure: **How to Create a Stand-alone Portal Page**

1. Create a new page in one of the following ways:

   ❏ From the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, and then click *Portal Page*.

   ❏ From the WebFOCUS Home Page, select a workspace or folder. On the Action Bar, click *Portal Page*.

   The Page Designer and the Add Page dialog box open.

2. Select a page template and, optionally, edit the Title and Name fields.

3. Click *Create*.

   The portal page displays in the Page Designer.

4. Optionally, add content to the portal page.

   If left blank, panels behave like Easy Selector containers at run time. To learn more about the Easy Selector, see *Using the Easy Selector* on page 107.

5. Save and close the Page Designer.

   The new stand-alone portal page displays repository. You can now copy, move, and link this portal page to portals.

Reference: **Page Designer**

The Page Designer is a subset of a Portal Designer. It allows you to create stand-alone portal pages inside domains and folders of your choice. The Page Designer interface is shown in the following image.
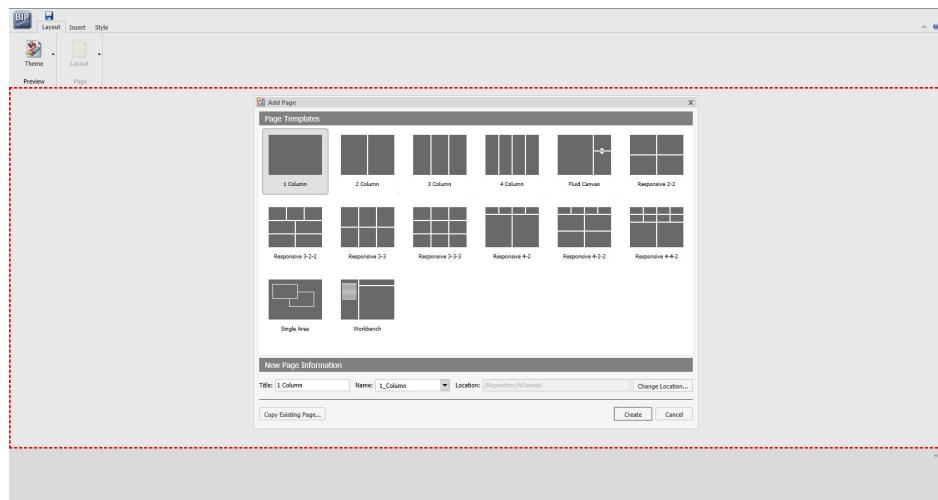
The Page Designer contains three primary elements:

❑ **Page Templates.** Preset layouts that you can use to quickly create portal pages. This feature is identical to the one in the Portal Designer, when you create collaborative portals. To learn more about page templates, see *Page Templates* on page 66.

❑ **Ribbon.** The ribbon is the abridged version of the ribbon in the Portal Designer that contains the following tabs:

  ❑ **Layout.** Allows you to select a theme and choose a layout for your portal page.

    Note: Custom themes do not get saved in the Page Designer, because portal pages cannot be run on their own and do not have their own CSS files. In Page Designer, the Custom Theme CSS and CSS Editor features act as tools to create a preview of what the portal page looks like, using a selected CSS theme. You can only apply and save this theme when the portal page is inside a portal.

  ❑ **Insert.** Provides choices of containers and content that you can add to a portal page.

  ❑ **Style.** Applies styles to common properties, such as background, border, and font.

❑ **Properties Panel.** The Properties panel appears near the bottom of the window, below the canvas. It shows properties that apply specifically to the currently selected item.

To learn more about these options, see *Portal Designer Overview* on page 60.

When you add Insight-enabled content to a portal page, it will run as a standard HTML5 chart. An Explore with Insight icon displays, as highlighted in the following image.
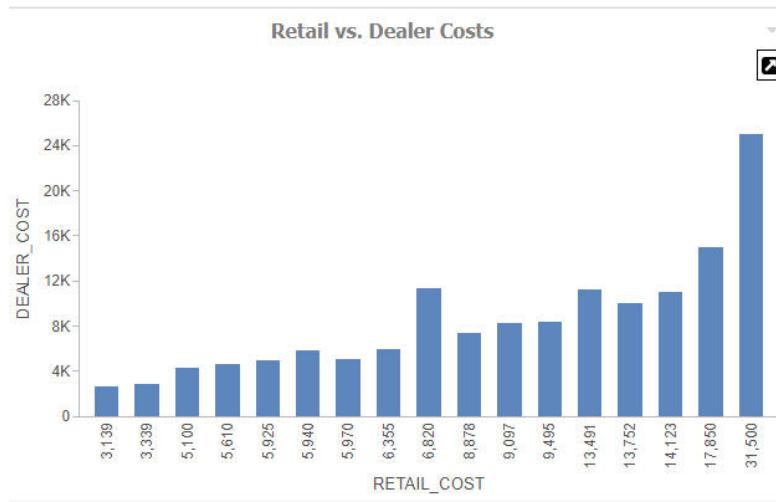
You can view the content in Insight mode by clicking the Explore with Insight icon. Content opens in a new browser tab.

Removing Customizations

All users can remove their own customizations for either a portal or a particular page in a portal. Developers and administrators can also remove all user customizations, which include all personal portal pages created by users at run time, as well as any changes made to unlocked portal pages at run time.

You can remove customizations in one of the following locations:

❏ From a portal in the repository.

❏ From a portal at run time.

Procedure: **How to Remove Customizations From a Portal in the Repository**

1. Right-click a basic or collaborative portal from the Legacy Home Page or WebFOCUS Home Page.

2. Point to *Customizations* and click one of the following options:

    ❏ **Remove My Customizations.** Removes your own customizations from a portal, deletes your personal portal pages, and unlinks any portal pages that were linked at run time.

    ❏ **Remove Customizations for All Users.** Removes all user customizations, any personal portal pages created at run time, and any links to portal pages that were linked at run time.

Procedure: **How to Remove Customizations From a Portal Page in the Repository**

1. Right-click a portal page from the Legacy Home Page or WebFOCUS Home Page.

2. Point to *Customizations* and click one of the following options:

    ❏ **Remove My Customizations.** Removes your own customizations, deletes your personal portal pages, and unlinks any portal pages that were linked at run time.

    ❏ **Remove Customizations for All Users.** Removes all user customizations, any personal portal pages created at run time, and any links to portal pages that were linked at run time.

Procedure: **How to Remove Customizations From a Portal at Run Time**

1. From the Menu Bar of a portal, click your username.

2. Click *Remove My Customizations*.

   The customizations are removed from the portal and its pages. Personal pages are removed. Pages that were linked at run time are unlinked.

Procedure: **How to Remove Customizations From a Page at Run Time**

1. Inside the running portal, right-click a page tab.

2. Click *Remove My Customizations*.

   The portal refreshes. The customizations are removed from the modified portal page.

   Note: This option is not available when the Lock Page option is selected.

Using the Easy Selector

The Easy Selector provides a simple way to add content to a portal at run time, without opening the Resources tree. It also allows you to control which items users can access.

You can enable the Easy Selector feature on a container or a column level.

Procedure: **How to Use the Easy Selector Container**

1. Sign in to WebFOCUS as a developer or an administrator.

2. In the Resources tree, populate a new or existing folder with the content that you intend to make available through the Easy Selector at run time.

   Note: Ensure that the folder only includes file content and no subfolders.

3. Ensure that the folder is published.

4. Create a new portal or edit an existing portal.

5. In the Portal Designer, on the *Insert* tab, in the *Containers* group, click *Easy Selector*.

   The Easy Selector container is added to the portal page. The Browse For Folder dialog box opens next to the Easy Selector container, allowing you to select a target folder.

6. Optionally, navigate to the folder that you that want to display inside the Easy Selector at run time, and then click *OK*. If no target folder is selected, the entire repository displays at run time, allowing the user to explore all available workspaces and folders.

   Note: You can change the folder location by clicking the *Select Folder* button in the Properties panel, and navigating to a different folder. It is not recommended to change the folder location after the end users have begun using the Easy Selector.

7. Create additional Easy Selector containers, if needed.

   Note: You can multiselect the containers by holding the Ctrl key.

8. Click *Save*, and close the Portal Designer.

9. Run the portal where you added the Easy Selector containers.

   When the portal opens, it displays the *Add content* button in each column for which you have enabled the Easy Selector.

10. Click the *Add content* button.

    The Select Item dialog box opens.

11. Select the item that you want to display and click *Add*, as shown in the following image.
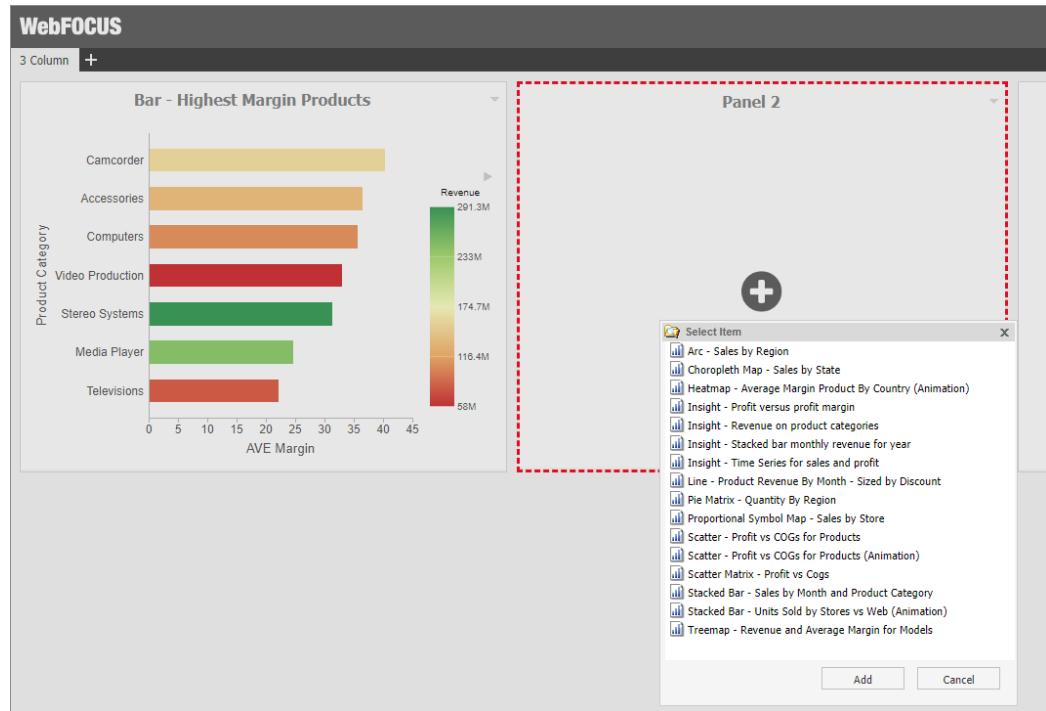
The selected item opens inside the Easy Selector container.

Procedure: How to Use Easy Selector in a Column

1. Sign in to WebFOCUS as a developer or an administrator.

2. In the Repository, populate a new or existing folder with the content that you intend to make available through the Easy Selector at run time.

   Note: Ensure that the folder only includes file content and no subfolders.

3. Ensure that the folder is published.

4. Create a new portal or edit an existing portal.

5. In the Portal Designer, right-click the page canvas, and click *Page Layout*.

6. From the Choose a Layout menu. Set the page layout to *One Column*, *Two Columns*, *Three Columns*, or *Four Columns*.

   Note: Easy Selector functionality is only available for columnar layouts. It is not available for the Single Area and Fluid Canvas layouts. In addition, the Easy Selector feature is not available for use with the Responsive container.

7. With the page canvas selected, in the Properties panel, clear the *Lock Page* check box and select the *Prevent Layout Change* check box.

   Note: This configuration allows users to add new content to a portal at run time, while preventing them from changing the column layout, which is important for the Easy Selector.

8. In the Properties panel, click *Container Defaults*.

   The Container Defaults dialog box opens. Here you can customize the drop-down menu for the items that are displayed on the portal page at run time. Click *OK* to close the Container Defaults dialog box.

9. Select a column.

10. In the Properties panel, select the *Show Easy Selector* check box.

The Browse For Folder dialog box opens and displays the same folder structure that you see in the Repository, as shown in the following image.
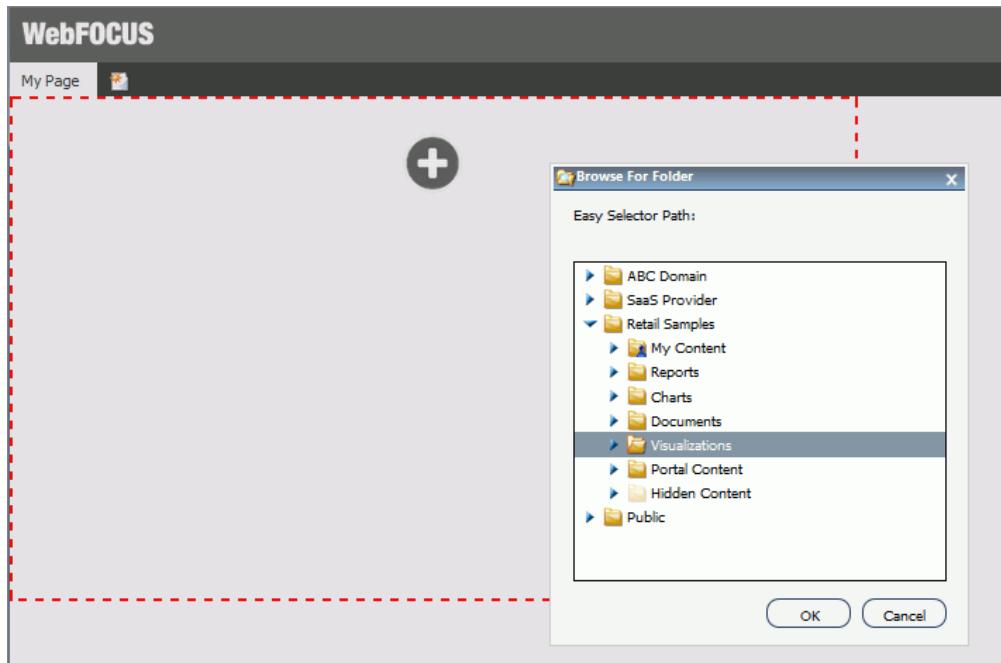
11. Click the folder you that want to display inside the Easy Selector at run time, and then click *OK*.

    Note: You can change the folder location by clicking the *Select Folder* button and navigating to a different folder. It is not recommended to change the folder location after the end users have begun using the Easy Selector.

12. Modify any other columns to use the Easy Selector, if needed.

    Note: You can multiselect the columns by holding the Ctrl key.

13. Click *Save* and close the Portal Designer.

14. Run the portal where you added the Easy Selector containers.

    When the portal opens, it displays the *Add content* button in each column for which you have enabled the Easy Selector.

15. Click the *Add content* button.

    The Select Item dialog box opens.

16. Select an item from the list and click *Add*.

The selected item opens and a new Add content button displays in the next column. This allows you to add the remaining items that are available to you. You can also multiselect items inside the Select Item dialog box, as shown in the following image.
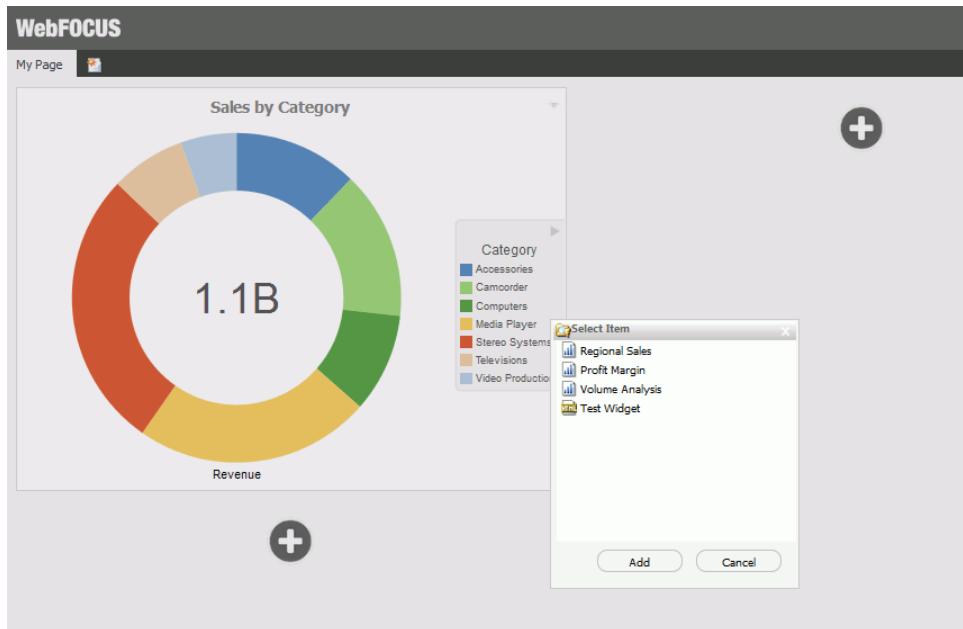
Additionally, you can replace an item on the portal page with any item from the Select Item dialog box. You can access the Replace option by clicking the arrow in the upper-right corner of the container panel.

Note: The Add content button disappears and the Replace option becomes inactive after the last item in the Select Item dialog box is added to the page.

Building a Basic Responsive Portal

A responsive portal allows you to create layouts that resize dynamically to any width based on screen size, device, and orientation, thus eliminating the need to design for a specific device preference. This approach takes your content beyond the desktop and delivers a quality experience to users, on any display. The Portal Designer offers you a series of versatile presets, that make the task of creating a responsive portal a quick and straightforward process.

There are two methods for building a responsive portal: percentage-based and pixel-based. Both methods produce responsive behavior. The percentage-based responsive portal uses percentages to scale columns and panels to any width, while the pixel-based responsive portal relies on the developer to set a range within which the content will fluctuate in size. Follow the procedures below to see how these methods create a basic responsive portal in the Portal Designer.

A user must have the privileges of a developer or administrator to be able to build a basic responsive portal.

Procedure: **How to Build a Basic Responsive Portal Using Percentages**

1. Sign in to WebFOCUS as a developer or an administrator.

2. Create a new basic portal or open an existing basic portal.

    See *Creating a Portal* on page 60 for more information on creating a new basic portal.

3. In the Portal Designer, right-click the page canvas, and then click *Page Layout*. You can also click the *Layout* button on the Layout tab, in the Page & Banner group.

    The Choose a Layout menu opens.

4. Click *One Column*.

    All responsive layouts are created in a one column page layout.

5. Click inside the column that you just created. On the Properties panel, set the *Top Container Padding* to *5px* and select the *Same for All* check box.

6. On the *Insert* tab, in the *Containers* group, click *Responsive*.

    The Responsive container is inserted, taking up the full width of the page.

7. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.

8. Populate the responsive container with content from the folder of your choice, by dragging them to the container.

    When you drag items sequentially, you can choose the order in which they display, using the shaded placement indicator as a guide. When you drag items simultaneously, using the multiselect option (Ctrl key), they display in the order in which they are selected.

    Note: Your portal page can also contain a responsive filter panel that was created in WebFOCUS App Studio. For more information on how to create responsive filter panels that you can add to a BI Portal, see the WebFOCUS App Studio technical content.

9. Multi-select the panels to which you want to assign the Custom CSS Classes by holding the Ctrl key and clicking a title bar of each panel.

    For example, if you were going to create a responsive portal that contained four items in the first row, and two items in the second row, you would select the first four panels.

Note: You can only multi-select panels by clicking its title bars. If the title bars are hidden, you cannot multi-select these panels.

10. On the Properties tab of the Properties panel, click the *Responsive Properties* button.

    The Advanced Responsive Item Properties dialog box opens.

11. In the Custom CSS Classes field, type *bip-responsive-n*, where *n* is the responsive folding behavior that you want to apply the content on your page.

    For example, *bip-responsive-4-2-1* means that the content will display four items across on wide screens, two items across on medium screens, and one item across on narrow screens. If you use bip-responsive-3-2-1, the content will display three items across, then two items across, then one item across. If you use bip-responsive-2-1, content will display two items across, then one item across. If you choose bip-responsive-1, the item will fill the entire row.

    In the following image, we have updated the Custom CSS Classes field for a page that uses the 4-2-1 responsive folding behavior for the first four items on the page.
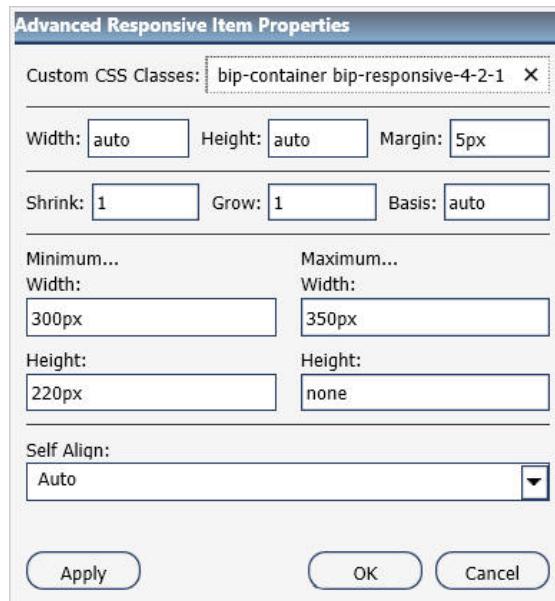
Note: When one of the built-in responsive classes is used in the Custom CSS Classes field, it sets the width of the panel as a percentage of the page width, based on media queries. The percentage width setting made in these built-in responsive classes overrides any width settings defined on the panel.

12. Click *OK* to close the Advanced Responsive Properties dialog box.

The first row of panels are now stretched evenly across the Responsive container.

13. Multiselect the remaining panels by holding the Ctrl key and clicking each panel.

14. On the Properties panel, click the *Responsive Properties* button.

    The Advanced Responsive Item Properties dialog box opens.

15. In the Custom CSS Classes field, type *bip-responsive-2-1*, as shown in the following image. This will enable the remaining two panels to go from two across to one across on a smaller screen.
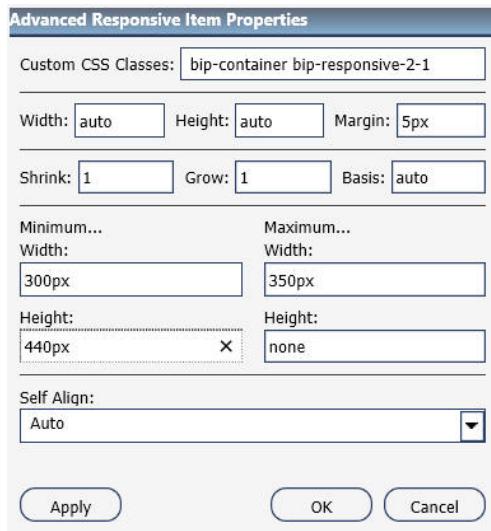
16. Set Minimum Height to *440px*.

17. Click *OK* to save the properties.

    The remaining panels now stretch across the Responsive container, in the second row.

    Note: You can create multiple layouts using this principle and varying the CSS classes to reflect the desired percentage.

18. With the Responsive container selected, make the following changes:

    ❏ On the Properties tab of the Properties panel, set Height to *Dynamic*.

    ❏ On the Title tab of the Properties panel, select the *Hide Title Bar* check box.

    ❏ On the Style tab of the ribbon, in the *Border* group, click *Style*, and then select *None*.

    Note: These changes render the Responsive container invisible on the page at runtime, and in Portal Designer. To edit the content in your Responsive container or access its properties, you can use the breadcrumb trail below the Property sheet to select it.

4. Customizing and Running Portals

19. Click the *Save* button and close the Portal Designer.

20. Run your portal.

21. Change the size of your browser window to observe the responsive behavior.

    All items rearrange perfectly to fill the portal page.

Procedure: **How to Build a Basic Responsive Portal Using Pixels**

1. Sign in to WebFOCUS as a developer or an administrator.

2. Create a new basic portal or open an existing basic portal.

    See *Creating a Portal* on page 60 for more information on creating a new basic portal.

3. In the Portal Designer, in the portal Properties panel, set the Width to *Responsive*, as shown in the following image.
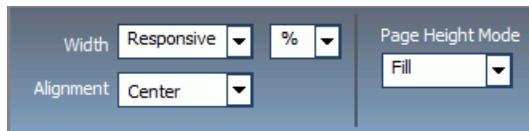
    Keep the default values for the Alignment and Page Height Mode options.

    The banner width changes in live preview to match the closest preset width.

4. Right-click the page canvas, and then click *Page Layout*. You can also click the *Layout* button on the Layout tab, in the Page & Banner group.

    The Choose a Layout menu opens.

5. Click *One Column*.

    All responsive layouts are created in a one column page layout.

6. Click inside the column that you just created. On the Properties panel, set the *Top Container Padding* to *5px* and select the *Same for All* check box.

7. On the *Insert* tab, in the *Containers* group, click *Responsive*.

    The Responsive container is inserted, taking up the full width of the page.

8. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.

9. Populate the responsive container with six content items from the folder of your choice, by dragging them to the container.

10. Multiselect the last two panels by holding the Ctrl key and click the *Responsive Properties* button.

    The Advanced Responsive Item Properties dialog box opens.

Business Intelligence Portal   115

Note: The range of minimum and maximum width and height is already filled by default for a small panel. You can change these values to adjust panel size and to create different layout. Keep in mind that in a responsive portal, setting fixed dimensions for items is not recommended. For this reason, you must only set a range between minimum and maximum width and height, defining the amplitude with which the item can vary in size.

11. Set the responsive item properties, as follows:

   a. Set Minimum Width to *380px*.

   b. Set Maximum Width to *710px*.

   c. Set Minimum Height to *440px*.

   An example of the completed configuration is displayed in the following image.
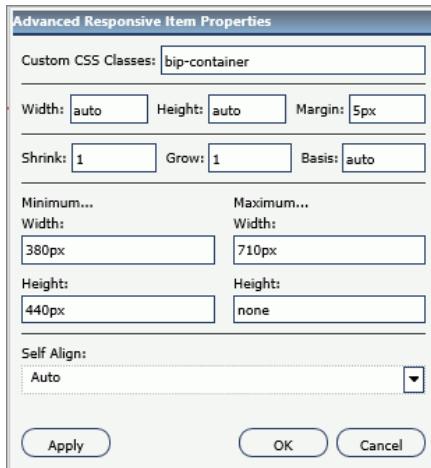
12. Keep the default values for all other properties, and click *OK*.

   The two bottom panels change size simultaneously. The layout now features two even lines of panels, four small and two large ones.

13. With the Responsive container selected, make the following changes:

   ❏ On the Properties tab of the Properties panel, click the *Responsive Properties* button, and then set Height to *Dynamic*.

   ❏ On the Title tab of the Properties panel, select the *Hide Title Bar* check box.

   ❏ On the Style tab of the ribbon, in the Border group, click *Style*, and then select *None*.

   Note: These changes render the Responsive container invisible on the page at runtime, and in Portal Designer. To edit the content in your Responsive container or access its properties, you can use the breadcrumb trail below the Property sheet to select it.

14. Click the *Save* button and close the Portal Designer.

    Your new responsive portal now appears in the Repository.

External CSS Theme Support

External CSS Theme support is an advanced feature that enables you to customize a portal by applying or modifying external CSS files. It also allows you to edit any HTML element of your portal by adding CSS classes to it and specifying CSS properties, and see the visual impact of your changes in real time.

The CSS Theme feature consists of two parts:

❏ Portal Theme Files browser

❏ CSS Editor

In the Portal Theme Files browser, you can configure CSS files. The CSS Editor is designed to edit specific components of the existing CSS theme.

You must be signed in as a developer or administrator to use this feature in the Portal Designer.

Procedure: **How to Configure CSS Files**

1. Sign in to WebFOCUS as a developer or an administrator.

2. Create a new Enterprise Workspace with a basic portal.

3. On the Legacy Home Page, expand the new workspace folder, right-click the *Hidden Content* folder, point to *New*, and then click *Text Editor*.

    The new Text Editor window opens. Here you can enter CSS classes and enter CSS properties for your portal. In this example, we are modifying container border color and selected tab color.

4. Enter the following syntax in your Text Editor window:

```
.bip-container
{
    border: 1px solid rgb(87, 168, 250);
     border-radius: 0px;

}
.bip-tab-button-checked
{
    color: rgb(87, 168, 250);
     font-weight: 700;
     border-bottom-width: 1px;
     border-bottom-style: solid;
     border-bottom-color: rgb(87, 168, 250);
     background-color: white;

}
```

5. Click the *Save* button.

    The Save As dialog box opens.

6. Populate the title field, select the *Cascading Style Sheet* format from the drop-down list, and then click *Save*.

7. Close the Text Editor window.

8. On the Legacy Home Page, in the Resources tree, right-click your new portal, and then click *Edit*.

    The Portal Designer opens.

9. On the *Layout* tab, click *Theme*.

    The Portal Theme Files dialog box opens. The Neutral theme is selected as a Base theme by default.

10. Under Custom CSS Theme, click *Browse*.

11. Navigate to your new CSS file and click *Open*.

12. Click *Apply* and close the Portal Theme Files dialog box.

The color of container borders and selected tabs change to blue, as shown in the following image.
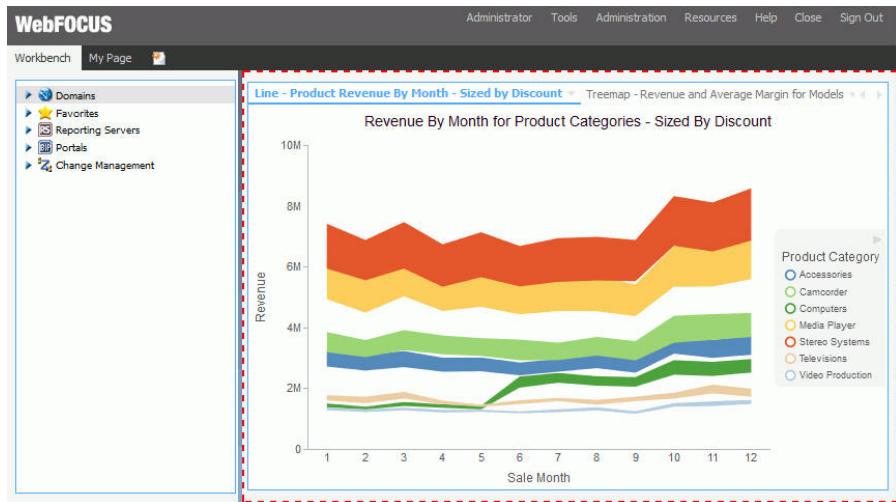
13. Click the *Save* button and close the Portal Designer.

Procedure: How to Customize CSS Properties in the CSS Editor

1. Launch the Portal Designer.

2. On the *Layout* tab, in the *Portal* group, click the Theme button splitter, then click *Launch CSS Editor*.

   The Styling dialog box opens.

3. On the toolbar, click the *Show the Element Inspector* button , and then click the *Inspect elements style information* button .

   Your cursor changes to a crosshair. You can also click the *Highlight inspected element*

   button to pinpoint the element that you want to style more easily.

4. Click a portal element that you want to style, in this example, the top banner.

   The Classes field is automatically populated with the correct CSS class name for the selected element, in our example *bip-banner-top*.

   Note: You can also select elements from the Elements drop-down list, or, if you know the CSS class name of the element, you can type it in the Classes field. You can also use the Search field to search for a CSS class using key words.

5. In the CSS File Editor, click the *Add Class* text, type your CSS class, preceded by a dot, and then press *Enter*.

6. Click the *Add property* text below the *.bip-banner-top* class and type *background-color:#56b7e6*, and then press Enter.

   The banner instantly changes color to the specified hue, as shown in the following image.
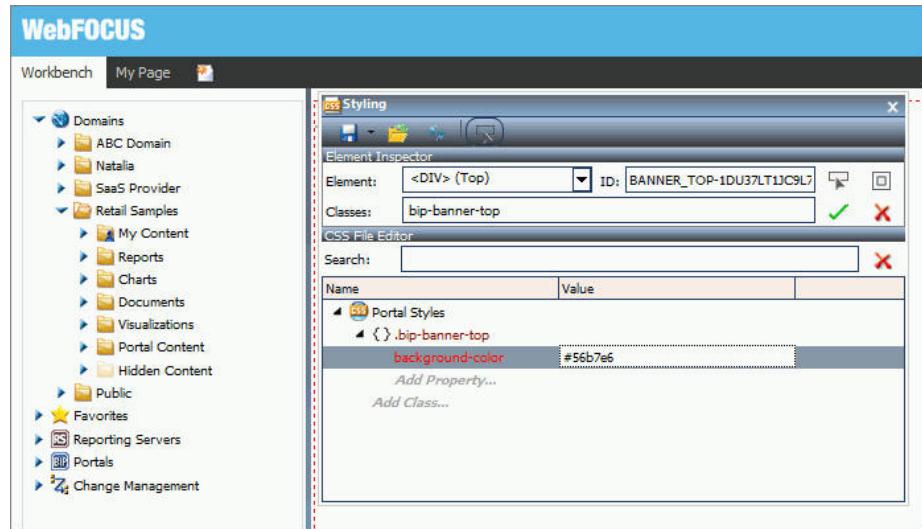
Note: If you have entered an invalid CSS class or attribute, the browser rejects it and the change is not reflected in the portal appearance.

7. Click the *Save* button in the Styling dialog box.

   If a custom CSS file is already applied to this portal, your changes will be saved in that file. If the changes are new, the Save As dialog box opens.

8. Navigate to the Hidden Content folder of your workspace, name your new CSS file, and then click *Save*.

9. Close the Styling dialog box.

10. Click the *Save* button and close the Portal Designer.

Working With Comments

In a collaborative portal, you can use comments to interact with your peers in a multi-user environment. Access to the comments feature is configured in the Security Center, by an administrator.

There are four user privileges that can be set to enable commenting in a portal:

❑ **Access Comments.** View comments from other users.

❑ **Create Comments.** Create comments and view comments from other users.

❑ **Edit Comments.** Edit and delete your own comments.

❑ **Manage comments.** Manage comments, including editing and deleting comments from other users, and removing all comments from all users.

Once the comments feature is configured, developers and administrators enable comments in the Portal Designer or Page Designer. You can enable comments on portal pages, containers, and individual content items.

Procedure: **How to Configure Comments Privileges**

1. Sign in to WebFOCUS as an administrator.

2. Launch the *Security Center*.

3. Click the *Roles* tab.

4. Click the *New Role* button to add a new role or select an existing role from the list and click *Edit Role*.

5. Select the check box next to the privilege that you want to grant to your role, as shown in the following image, and click *OK*.
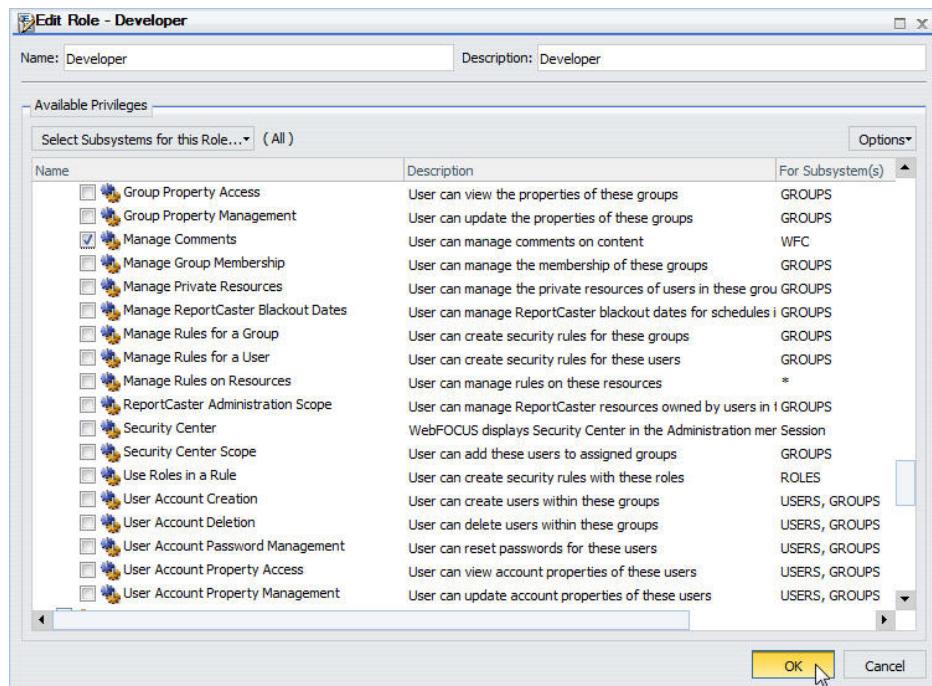
6. Click the *Users & Groups* tab.

7. Right-click a user or a group, point to *Security*, and then click *Rules*.

8. Select a user or a group from the list.

9. Locate the role that you have created or modified, click the *Access* column, select *Permitted* from the drop-down list, and then click *Apply*.

10. Click *OK* and close the Security Center.

Procedure: How to Enable Comments for a Portal Page

1. Sign in to WebFOCUS as a developer or an administrator.

2. Create a new collaborative portal or edit an existing collaborative portal.

3. In the Portal Designer, in the Properties panel, click the *Comments* drop-down menu and update the style of your comments to reflect any standards.

4. Save the portal and close the Portal Designer.

   If you are enabling comments on a stand-alone portal page, open the Page Designer by creating a new portal page or editing an existing portal page, and then repeat Step 3.

Procedure: How to Enable Comments on a Container

1. Sign in to WebFOCUS as a developer or an administrator.

2. Create a new collaborative portal or edit an existing collaborative portal.

3. In the Portal Designer, on the *Insert* tab, in the *Containers* group, click any container button.

   The container is placed on the page canvas.

4. In the Properties panel, select *Show Comments*.

   When enabled, this option allows you to show and hide comments on a container or item at run time.

5. Save the portal and close the Portal Designer.

   If you are enabling comments in a container, on a stand-alone portal page, open the Page Designer by creating a new portal page or editing an existing portal page, then repeat steps 3 and 4.

Using Comments at Run Time

When enabled, comments display at run time, as shown in the following image.
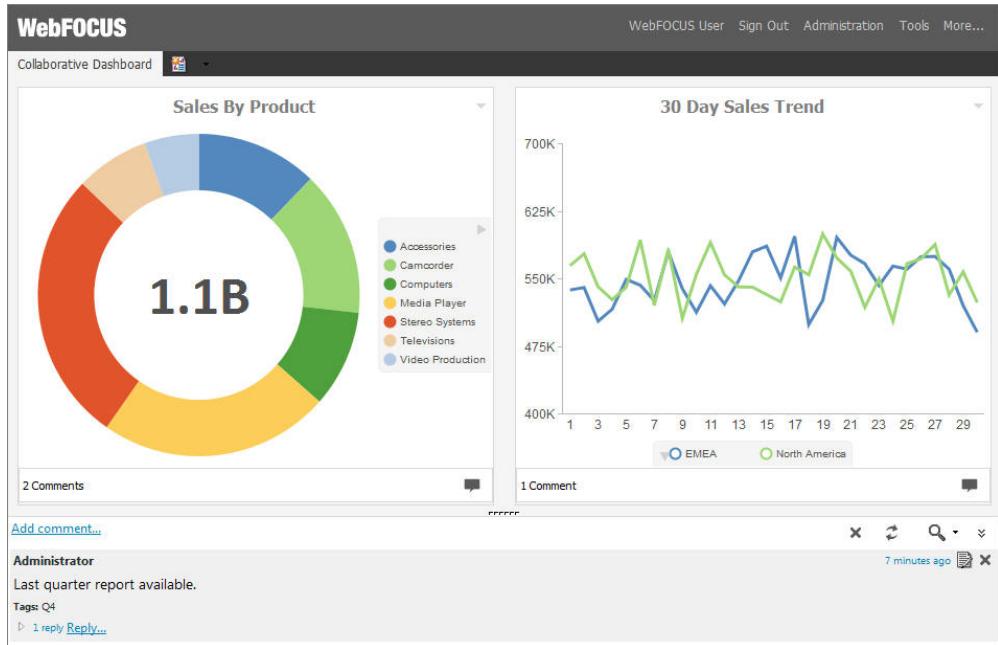
To enable comments on an item at run time, click the arrow in the upper-right corner of the container panel, and then click *Show Comments*, as shown in the following image.
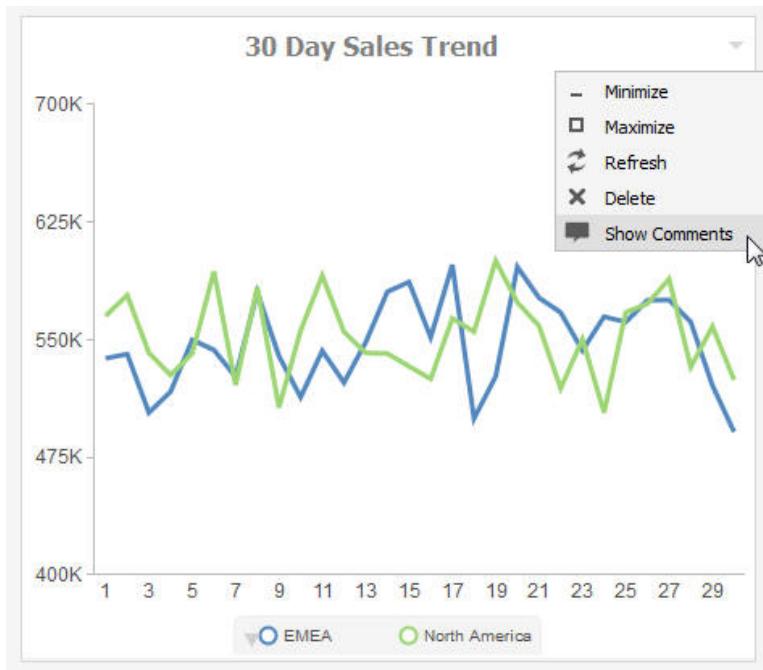
Note: The Show Comments menu option is only available if comments were enabled on a container at design time.

Additionally, you can use the following controls to interact with comments:

❑ Click the *Minimize* button in the upper-right corner of the comment area, to minimize comments, as shown in the following image.
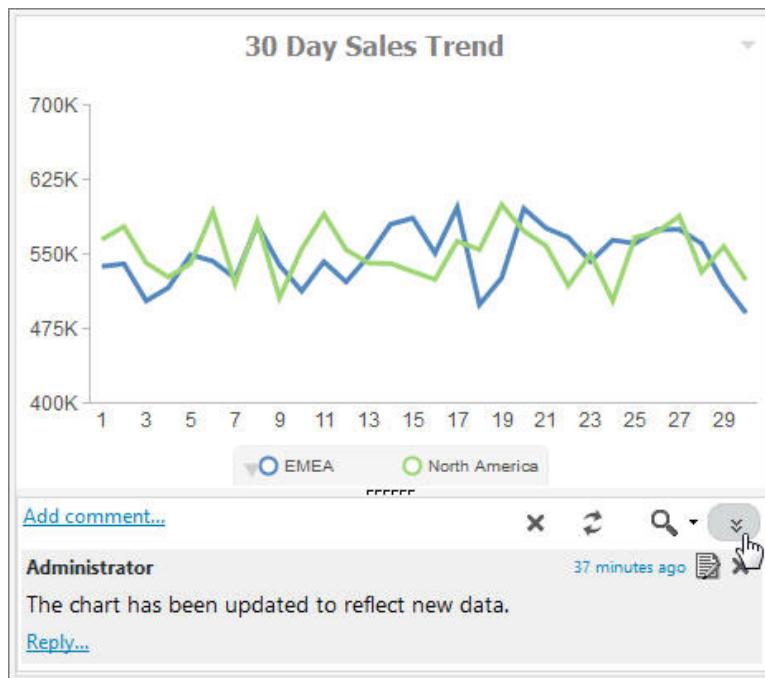
Click the *Restore* button in the lower-right corner of the container, to restore the comments area.

❏ Customize the height of the comments area by dragging the height indicator to achieve a desirable size, as shown in the following image.
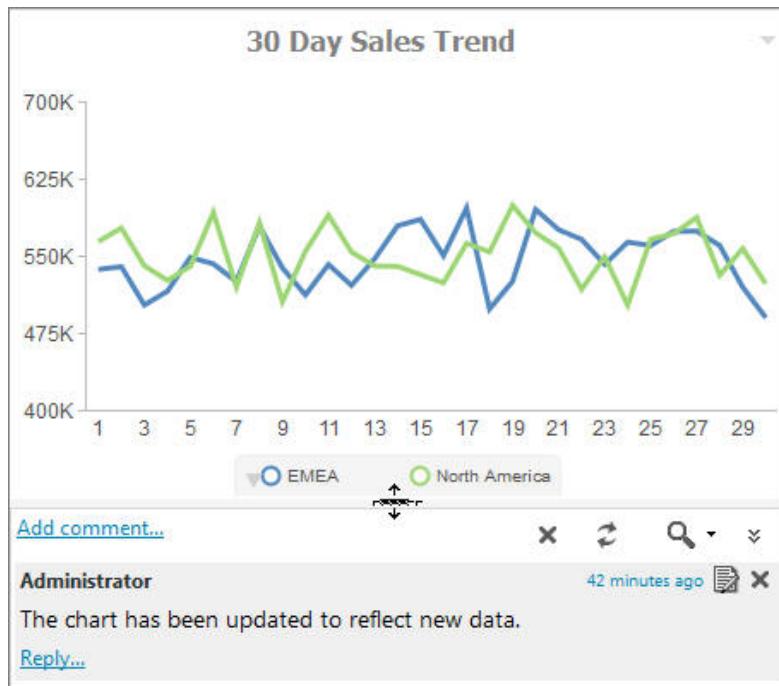
❏ Click the *Refresh* button in the comments menu, to refresh comments.

❏ Click the *Search* button in the comments menu, and type a key word or words in the search field, to search through comments. You can specify the search criteria by clicking the arrow next to the Search button and selecting search criteria, such as user name, content, or meta tags.

❏ Click the *Remove All* button to remove all comments from all users. The Remove All option is only available to users with the Manage Comments privilege.

Localizing Portals

WebFOCUS is a fully internationalized platform that supports the Unicode/UTF-8 standard, enabling operating systems, browsers, and applications to process and display information in virtually any spoken or written language. In addition to these default localization capabilities, users can also localize their own interface customizations. You can localize custom components in WebFOCUS in one of two ways:

❏ By implementing symbolic references.

❏ By configuring a translation file.

Note: This option is only available for basic portals. It is deprecated in favor of the symbolic references option.

Procedure: How to Localize Custom Components Using a Translation File

1. On the Legacy Home Page, in the Resources tree, right-click a basic portal, and then click *Translations*.

   The Translations file opens. The syntax contains the identification number for every component in the portal, its name, and language reference, as shown in the following image.

```
<translations>
    <viewid value="EMBEDDED_PORTAL_1-1WEIVNL07X8" />
    <translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="en_US"
key="name" value="Embedded Portal 1"/>
    <translation id="VIEW-3U1SPSUGZUREZ" language="en_US"
key="description" value=""/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="en_US" key="name"
value="Page 1"/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="en_US"
key="description" value=""/>
    <translation id="CONTAINER1-JT1SO4V1I13KL" language="en_US"
key="name" value="Panel 1"/>
    <translation id="CONTAINER2-JZ156JV9OZQM7" language="en_US"
key="name" value="Product Line Sales"/>
    <translation id="PANEL11-K41N5OL9ZDRPS" language="en_US" key="text"
value="By Product"/>
    <translation id="PANEL8-KD1A7FGQK9F7R" language="en_US" key="text"
value="Overall"/>
    <translation id="PANEL9-KS1UQOXUF2L3A" language="en_US" key="text"
value="By Regional"/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text" value="Product Line Sales"/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text_base" value="Panel 2"/>
<translations>
```

2. Copy and paste the sections of syntax that you want to translate, and account for as many translations as you need. For example, if you want to translate a basic portal to Spanish, you would only copy and paste the syntax once. If you want to translate a basic portal to Spanish and French, you would copy and paste the syntax twice.

    In this example, we only use English and Spanish.

3. In the copied portion of the syntax, change every instance of *en_US* to the language that you want to translate. In this example, we use *es_ES* for Spanish.

4. In the copied portion of the syntax, change the name of every component that appears in quotes after the word *value*, to the equivalent word in the language you are translating.

    The modified syntax should look similar to this:

```
<translations>
<viewid value="EMBEDDED_PORTAL_1-1WEIVNL07X8" />
    <translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="en_US"
key="name" value="Embedded Portal 1"/>
    <translation id="VIEW-3U1SPSUGZUREZ" language="en_US"
key="description" value=""/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="en_US" key="name"
value="Page 1"/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="en_US"
key="description" value=""/>
    <translation id="CONTAINER1-JT1SO4V1I13KL" language="en_US"
key="name" value="Panel 1"/>
    <translation id="CONTAINER2-JZ156JV9OZQM7" language="en_US"
key="name" value="Product Line Sales"/>
    <translation id="PANEL11-K41N5OL9ZDRPS" language="en_US" key="text"
value="By Product"/>
    <translation id="PANEL8-KD1A7FGQK9F7R" language="en_US" key="text"
value="Overall"/>
    <translation id="PANEL9-KS1UQOXUF2L3A" language="en_US" key="text"
value="By Regional"/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text" value="Product Line Sales"/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="en_US"
key="text_base" value="Panel 2"/>
<translation id="EMBEDDED_PORTAL_1-1WEIVNL07X8" language="es_ES"
key="name" value="Portal incrustado 1"/>
    <translation id="VIEW-3U1SPSUGZUREZ" language="es_ES"
key="description" value=""/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="es_ES" key="name"
value=" Página 1"/>
    <translation id="PAGE1-JB1X9O9F5FGX9" language="es_ES"
key="description" value=""/>
    <translation id="CONTAINER1-JT1SO4V1I13KL" language="es_ES"
key="name" value="Panel 1"/>
    <translation id="CONTAINER2-JZ156JV9OZQM7" language="es_ES"
key="name" value=" Línea de productos Ventas "/>
    <translation id="PANEL11-K41N5OL9ZDRPS" language="es_ES" key="text"
value=" Por Producto "/>
    <translation id="PANEL8-KD1A7FGQK9F7R" language="es_ES" key="text"
value=" En general "/>
    <translation id="PANEL9-KS1UQOXUF2L3A" language="es_ES" key="text"
value=" Por Regional "/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="es_ES"
key="text" value=" Línea de productos Ventas "/>
    <translation id="TITLEBAR2-L612GN2S7S1CZ" language="es_ES"
key="text_base" value="Panel 2"/>
<translations>
```

5. Optionally, repeat steps 2-4 to add a translation to another language.

6. Save and close the Translations file.

    Your translation is complete.

Procedure: **How to Localize Custom Components Using Symbolic References**

This procedure requires a Java development tool, such as Eclipse, NetBeans, or Java Development Kit (JDK). In this example, we are using Eclipse Java EE IDE.

1. If using Eclipse, follow the steps below:

    a. Launch Eclipse.

    b. Click *File*, point to *New*, and then click *Java Project*.

        The New Java Project dialog box opens.

    c. In the Project name field, type the name of your project and click *Finish*.

    d. Right-click your new project, point to *New*, and then click *Package*.

        The New Java Package dialog box opens.

    e. In the Name field, type the following name:

        `com.ibi.`*`desired_name`*`.intl.templates`

        where:

        `desired_name`
            Is any identifiable name that you want to use for your localized data.

    f. Click *Finish*.

    g. Right-click the package that you just created, point to *New* and then click *File*.

        The New File dialog box opens.

    h. In the File Name field, type *BIP_PageComponentTemplate.properties* and click *Finish*.

    i. Double-click the file that you just created.

        The editor opens in the right pane.

    j. Type a symbolic reference of your choice, followed by the equal sign, and the value for that symbolic reference.

        An example of the simple symbolic reference syntax is shown in the following image.
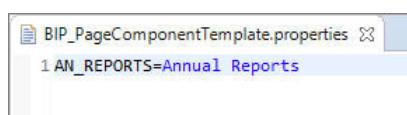
    k. Repeat Steps g and h to create a PROPERTIES file for a different language. In this example, we create a file for the Spanish translation and name it *BIP_PageComponentTemplate_es.properties*.

    l. Double-click the PROPERTIES file for the language you are translating.

m. Type the same symbolic reference as you did in the BIP_PageComponentTemplate.properties file, followed by the equal sign, and the Spanish translation of the value.

An example of the Spanish version of the syntax is shown in the following image.

```
BIP_PageComponentTemplate_es.properties  ⊠
1 AN_REPORTS=Informes Anuales
```

n. Save and close both PROPERTIES files.

o. Right-click the project and then click *Export*.

The Export wizard opens.

p. Under the Java folder, select *JAR file* and click *Next*.

The JAR Export window opens.

q. Make sure all your elements, such as the project, package, and translated PROPERTIES files, are selected, and click *Browse*.

The Save As dialog box opens.

r. Point to a location in your environment where you want to export the JAR file.

s. In the File name field, type the same custom name that you used as part of the package name and click *Save*.

An example of a completed JAR export window is shown in the following image.
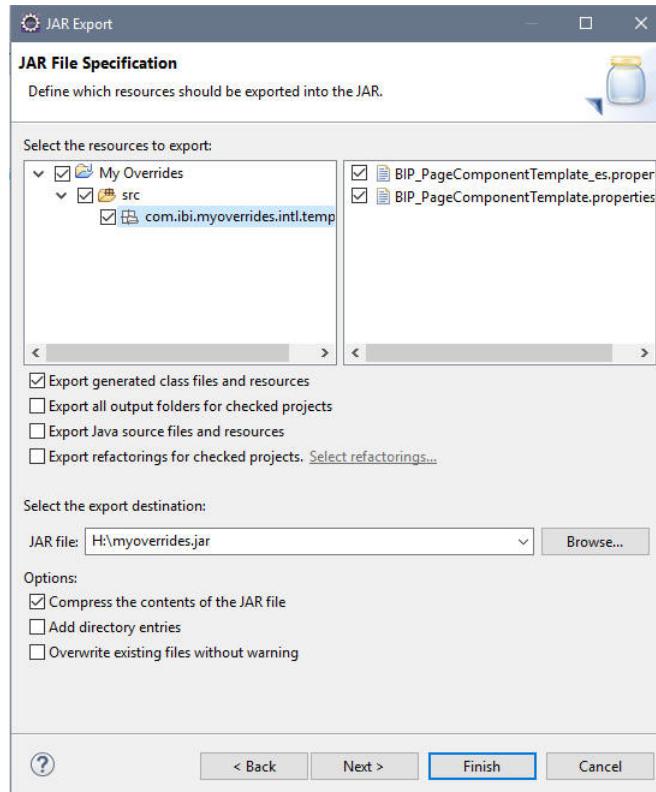
t.   Click *Finish* and close Eclipse.

2.   If using JDK, follow the steps below:

   a.   In your environment, create the following directory structure:

   com\ibi*desired_name*\intl\templates

   where:

   desired_name
        Is any identifiable name that you want to use for your localized data.

   b.   Make sure there is one higher level directory above the com folder. In our example the higher level directory is called Localization.

   c.   Inside the templates folder, create the BIP_PageComponentTemplate.properties file and its versions for the languages that you want to use.

   d.   Create custom symbolic references inside each PROPERTIES file, as described in the previous example.

4. Customizing and Running Portals

e. Save and close PROPERTIES files.

f. Open the Command Prompt.

g. Type the following string:

Disk:\PROGRA~1*path to JDK*\jar cvf *jar-file-name.jar* -C *higher level directory name/* .

where:

Disk:
    The disk where the JDK is located.

path to JDK
    The path to the JDK inside your Program Files directory.

jar-file-name.jar
    The name of your JAR file. Use the same name that you used as part of the directory structure in Step a.

higher level directory name
    The name of the directory where the com folder resides.

h. Press Enter.

The JAR file is created.

The following image shows an example of a completed command.
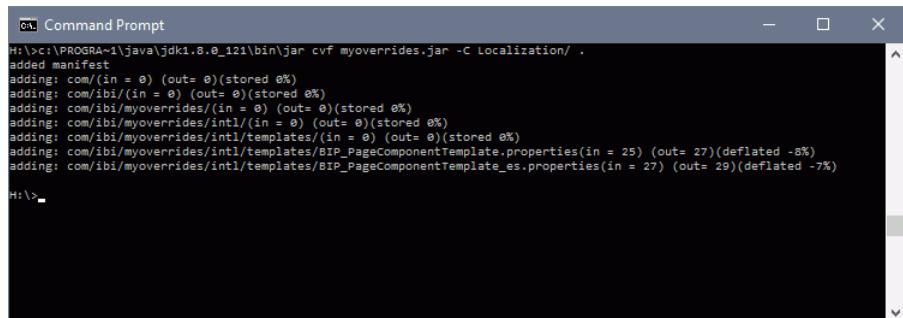
3. Navigate to the location of your JAR file, copy the file and paste it into a folder in the Application Server classpath.

4. Login to WebFOCUS as an administrator.

5. Launch the Administration Console.

6. On the Configuration tab, under the Application Settings folder, click *Other*.

7. Select the *Enable Custom Strings* check box, and type the following name in the *Custom Strings* field:

```
com.ibi.desired_name
```

where:

```
desired_name
```
    Is the name of your JAR file.

The following image shows the completed configuration.

❷	Enable Custom Strings	☑
❷	Custom Strings	com.ibi.myoverrides

8. Click *Save* and close the Administration Console.

9. Restart your Application Server.

10. Relaunch WebFOCUS.

11. Create a new collaborative or basic portal.

For more information on creating portals, see *Creating a Portal* on page 60.

12. Use your custom symbolic reference to name an element in your portal. In this example, we are using it as a page title. In the page Properties panel, in the Title field, type:

```
${value}
```

where:

```
value
```
    Is the name of your symbolic reference.

An example of a symbolic reference applied in the portal is shown in the following image.

Properties

Title

${AN_REPORTS}

Sales Portal > Pages

13. Save and close the portal.

14. Run your portal.

The symbolic reference value displays, as shown in the following image.
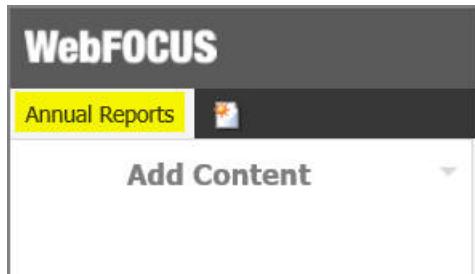
15. In the portal, on the Menu Bar, click *Language* and select the language you used for your symbolic reference, in this example, select Spanish.

The symbolic reference value changes to its equivalent in the set language, as shown in the following image.

Note: If the Language option is disabled in your WebFOCUS environment, you can enable it in the Administration Console. Under the Dynamic Language Switch settings, select the *Enable Dynamic Language* check box, select the languages that you want to use in your portal from the table, and click *Save*.

Creating a Custom Sign-in Page

You can create and utilize a custom sign-in page for your WebFOCUS environment. This allows you to override the default sign-in page that ships with WebFOCUS 8, which is a basic logon screen with default branding.

Creating and Customizing a Sign-in Page

Using a three step process, you can create and customize a sign in page that is specific to your company or organization. The three steps include:

1. *Designing and Enabling the New Custom Sign-in Page* on page 136

Designing and Enabling the New Custom Sign-in Page

The packaged custom sign in page, as shown in the following image, is made up of a background image that contains a dialog box for the sign-in credentials.
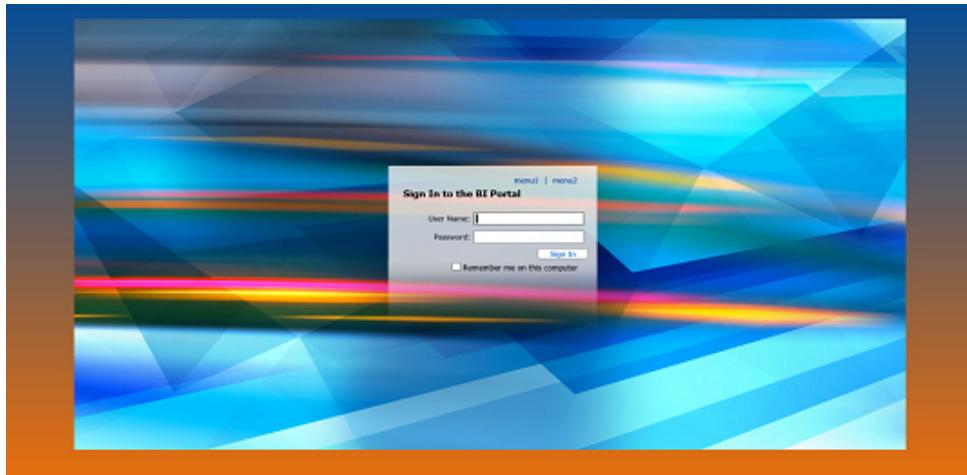
The background image is centered in a div class, providing some space around the image. To design your page, see *How to Design the Page* on page 136.

Procedure: **How to Design the Page**

1. Decide on whether you will use a background image, a color (solid or gradient), or both.

2. Create a mockup in an image editing software that can handle layered PNG files or PSD files, such as Adobe® Fireworks® or Adobe® Photoshop®, respectively. The Open Source Software GIMP can be used to edit the .psd file.

    a. Open the provided sample multi-layer image.

    b. Replace the background image in the Custom Background layer with your image or colors.

    c. Set the alpha transparency to the desired percentage.

    Note: Not all images will require you to set the alpha transparency. Generally, the value will be between 50-75%.

    d. If necessary, resize the canvas to fit your image.

    e. Customize the form, as described in *How to Customize the Form* on page 137.

    f.   Export your image as a .gif or .png to preserve transparency.

    g.   Place your image in \ibi\WebFOCUS82\config\web_resource\signin\images.

Procedure: **How to Customize the Form**

1. For the form background:

   a. Change the background color of the Form Area Background object in the Form Layer to suit your color scheme.

   b. Position the form background as desired. Depending on the text you edit in the next step, you may need to resize this box.

2. For the form elements:

   a. Determine whether or not the Remember Me feature is used in your installation. If so, turn on the Remember element in the Form Layer.

   b. Change the text, as needed in the Form Layer.

   c. Style and position all form elements in the Form Layer.

3. For the error message:

   a. Turn on the error message sublayer.

   b. Style and position the error message background and text.

4. Turn off the Form Layer, as these items will be generated at run time.

Procedure: **How to Enable the New Custom Sign-in Page**

The last step is to enable the new page that you have created. Use the following steps to complete this task.

1. Sign in to WebFOCUS as an administrator.

2. Launch the WebFOCUS Administration Console.

3. Click the *Configuration* tab, expand the *Application Settings* folder, and click *BI Portal*.

4. Select the *Customized Sign-in Page* check box, as shown in the following image.
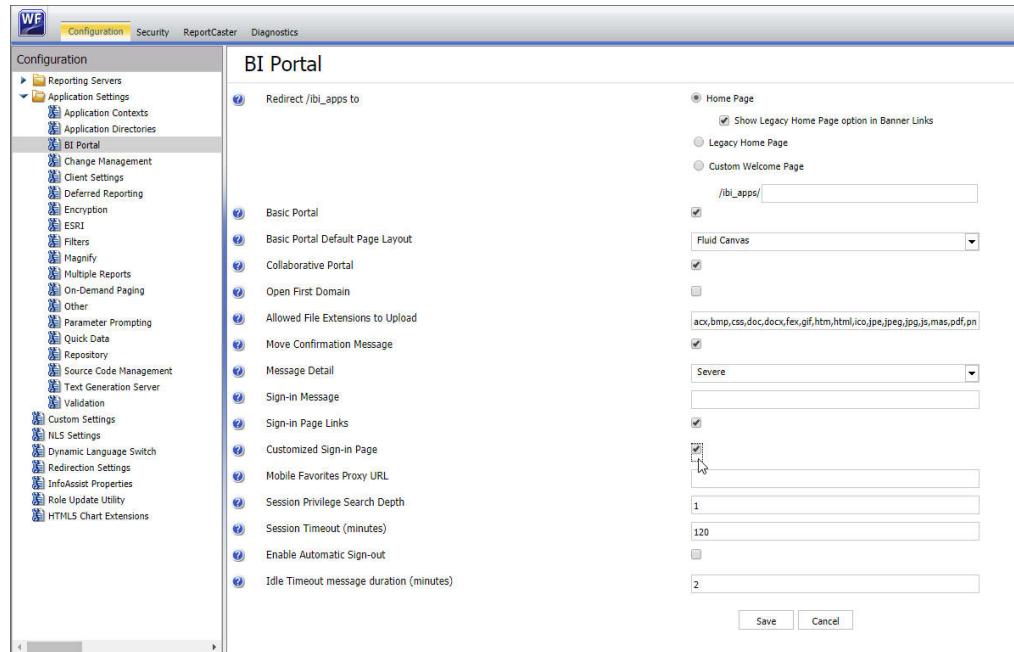
5. Click *Save*.

6. Sign out of WebFOCUS.

Setting the Text Labels

WebFOCUS provides you with the ability to change the text of all labels on the sign-in page. It also gives you the ability to include up to two custom links in the menu bar.

Procedure: **How to Set the Text and Links**

1. Browse to \ibi\WebFOCUS82\config\web_resource\signin\.

2. In a text editor, such as Notepad ++, edit the customsignin.xml file.

3. Change the text in the desired elements.

   The following tables provide you with the element, XML tag name, and the default value for that element (which can be changed). The value you enter does not include the XML CDATA wrapper.

Note: If you do not see your changes in this section or the CSS section taking effect, you may need to clear the cache in your browser.

Main Page Elements	XML Tag	Default Value
Page Title	<signin_custom_page_title>	BI Portal Sign In
Menu Item 1 Text	<signin_menu_button1>	menu1
Menu Item 1 Link	<signin_menu_button1_link>	https://www.tibco.com/
Menu Item 2 Text	<signin_menu_button2>	menu2
Menu Item 2 Link	<signin_menu_button2_link>	https://www.tibco.com/
Frame (Form Area) Title	<signin_custom_frame_title>	Sign In to the BI Portal
User Name Label	<signin_user_name_label>	User Name:
Password Label	<signin_password_label>	Password:
Sign In Button Text	<signin_button>	Sign In
Remember Me Option	<remember_me_checkbox>	Remember me on this computer

Change Password Dialog Elements	XML Tag	Default Value
Title Text	<signin_custom_change_password_frame_title>	Change Password
User Name Label	<signin_change_password_user_name_label>	User Name
Old Password Label	<signin_change_password_old_password_label>	Old Password
New Password Label	<signin_change_password_new_password_label>	New Password
Confirm Password Label	<signin_change_password_confirm_password_label>	Confirm New Password
Sign In Button Text	<signin_change_password_sigin_button>	Sign In
Cancel Button Text	<signin_change_password_cancel_button>	Cancel

Already Signed In Dialog Elements	XML Tag	Default Value
Title Text	<signin_custom_user-already-signin_frame_title>	User is already signed in
Message Text	<signin_custom_user-already-signin_message>	An active session for this user already exists. Would you like to continue to sign in, and cancel the other session?

Editing the CSS File to Position and Style Page Elements

You have flexibility when you lay out the custom sign-in page. Styling and positioning are done exclusively in CSS.

Procedure: **How to Edit the CSS**

1. Browse to \ibi\WebFOCUS82\config\web_resource\signin\

2. In a text editor, such as Notepad ++, edit the customsignin.css file.

3. Edit the desired elements.

    Note:

    ❏ To test at any point, save and go to

    `http://server:port/ibi_apps/`

    ❏ Ensure that your browser zoom is at 100%.

    ❏ Positioning and styling information for all elements can be obtained by selecting the corresponding element inside of your imaging editing software. You may need to slightly adjust the positioning.

    ❏ Image URLs are relative to the directory containing the CSS file (\ibi \WebFOCUS82\config\web_resource\signin\). The URL to that directory is

    `http://server:port/ibi_apps/web_resource/signin.`

The following table provides the elements you can edit, their CSS class name, and suggested attributes you may want to change.

Main Page Elements	CSS Class or HTML Tag	Suggested Changes

Page Background Color	body, html	Either Gradient or Solid:
		
		❏ Gradient
		
		    ❏ Replace all instances of #064e96 with your start color.
		
		    ❏ Replace all instances of # ff7200 with your end color.
		
		❏ Solid
		
		    ❏ Delete the bottom eight lines of code in the body, html class, which read:
		
		    ❏ background: -webkit-gradient(linear, 0 0, 0 100%, from(#064e96) to(#ff7200)); /*old webkit*/ background: -webkit-linear-gradient(#064e96, #ff7200); /*new webkit*/background: -moz-linear-gradient(#064e96, #ff7200); /*gecko*/

Main Page Elements	CSS Class or HTML Tag	Suggested Changes

Page Background Color *(continued)*	body, html *(continued)*	❏ Solid *(continued)*
		
		  ❏ background: -ms-linear-gradient(#064e96, #ff7200); /*IE10*/ background: -o-linear-gradient(#064e96, #ff7200); /*opera 11.10+*/ background: linear-gradient(#064e96, #ff7200); /*future CSS3 browsers*/ -pie-background: linear-gradient(#064e96, #ff7200);behavior: url(web_resource/signin/PIE.htc);
		
		  ❏ Change the color in the remaining background attribute to your desired color.

Sign In Background Image	.signin-background-image	❏ Change the image ❏ Set width to the image width ❏ Set height to the image height
	.signin-box	❏ Set width to the image width ❏ Set height to the image height **Note:** Top and left can be used to relatively center the image and all the controls, if desired.
Menu Bar Position	.signin-custom-menu-bar-position	❏ Set top ❏ Set left
Menu Bar Styling	.signin-custom-menu-bar	❏ Set desired styling, such as font family, size, color, and so on.

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Menu Bar Separator Styling	.signin-menu-bar-separator	❑ Set desired styling, such as font family, size, color, and so on. ❑ To hide the separator, set color to transparent.
Frame Title Position	.signin-custom-frame-title	❑ Set top ❑ Set left
Frame Title Styling	.signin-custom-frame-label	❑ Set desired styling, such as font family, size, color, and so on.
User Name Label Position	.signin-custom-username-label-position	❑ Set top ❑ Set left
User Name Label Styling	.signin-custom-username-label	❑ Set desired styling, such as font family, size, color, and so on.
User Name Input Control Position	.signin-custom-username-editbox	❑ Set top ❑ Set left
User Name Input Control Styling	.signin-custom-username-editbox-input	❑ This controls styling, you should apply background colors here.
Password Label Position	.signin-custom-password-label-position	❑ Set top ❑ Set left
Password Label Styling	.signin-custom-password-label	❑ Set desired styling, such as font family, size, color, and so on.
Password Input Control Position	.signin-custom-password-editbox	❑ Set top ❑ Set left

Main Page Elements	CSS Class or HTML Tag	Suggested Changes
Password Input Control Styling	.signin-custom-password-editbox-input	❏ This controls styling, you should apply background colors here.
Remember Me Option Position	.signin-custom-remember-me-position	❏ Set top ❏ Set left
Remember Me Option Styling	signin-custom-remember-me	Set desired styling, such as font family, size, color, and so on.
Sign In Button Label Styling	.signin-button-label	Set desired styling, such as font family, size, color, and so on.
Sign In Button Position	.signin-custom-button-signin-position	❏ Set top ❏ Set left
Sign In Button Styling	.signin-custom-button-signin	❏ Set border radius, size, and color ❏ Set font
	.signin-button, .button	

Note: If you need to resize any objects, use the same class on which you set the position.

Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Position	.signin-custom-error-position	❏ Set top ❏ Set left
Error Message Styling	.signin-custom-error-message	❏ Set desired styling, such as border radius, font family, size, color, and so on.

4. Customizing and Running Portals

Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Image	.signin-custom-error-image	❑ Set the image ❑ Uncomment the :visibility: hidden; line to hide the image, but keep the space it takes. Use display: none; to remove the image, including the space it occupies.

The styling of the elements in the following two tables are inherited from the main page elements. This means the buttons, labels, and controls match to the main page.

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-change-password-position	❑ Set top ❑ Set left ❑ Set desired styling, such as font family, size, color, and so on.
Dialog Title Bar	.signin-custom-change-password-title-position	❑ Set background color
Dialog Title Label	.signin-custom-change-password-title-label	Set desired styling, such as font family, size, color, and so on.
Dialog Title Icon	.signin-custom-change-password-title-image	Set the image.
User Name Label Position	.signin-custom-change-password_username-label-position	❑ Set top ❑ Set left
User Name Input Control Position	.signin-custom-change-password_username-editbox-position	❑ Set top ❑ Set left

Business Intelligence Portal   145

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Old Password Label Position	.signin-custom-change-password_old-password-label-position	❏ Set top ❏ Set left
Old Password Input Control Position	.signin-custom-change-password_old-password-editbox-position	❏ Set top ❏ Set left
New Password Label Position	.signin-custom-change-password_new-password-label-position	❏ Set top ❏ Set left
New Password Input Control Position	.signin-custom-change-password_new-password-editbox-position	❏ Set top ❏ Set left
Confirm New Password Label Position	.signin-custom-change-password_confirm-password-label-position	❏ Set top ❏ Set left
Confirm New Password Input Control Position	.signin-custom-change-password_confirm-password-editbox-position	❏ Set top ❏ Set left
Confirm New Password Input Control Position	.signin-custom-change-password_confirm-password-editbox-position	❏ Set top ❏ Set left
Sign In Button Position	.signin-custom-change-password-button-signin-position	❏ Set top ❏ Set left
Cancel Button Position	.signin-custom-change-password-button-cancel-position	❏ Set top ❏ Set left

User Already Signed In Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Dialog Styling and Position	.signin-custom-user-already-signin-position	❏ Set top ❏ Set left ❏ Set desired styling, such as font family, size, color, and so on.
Dialog Title Label	.signin-custom-user-already-signin-label-position	❏ Set desired styling, such as font family, size, color, and so on. ❏ You may want to adjust left if you do not use an icon.
Dialog Title Icon	.signin-custom-user-already-signin-title-image	❏ Set the image ❏ Delete the visibility: hidden; line to show the image.
Sign In Button Position	.signin-custom-user-already-signin-button-signin-position	❏ Set top ❏ Set left
Cancel Button Position	.signin-custom-user-already-signin-button-cancel-position	❏ Set top ❏ Set left

Procedure: How to Set the Text Labels

The following is a walkthrough, using the sample image, to implement a custom sign-in page. This assumes you have already performed the design and enable steps.

1. Browse to \ibi\WebFOCUS82\config\web_resource\signin\.

2. In a text editor, such as Notepad++, edit the customsignin.xml file.

3. Change the text in the following elements.

   Note: The following table shows only the elements that changed in the example. Enter the value shown in the Example Value column into the XML file.

Main Page Elements	XML Tag	Example Value
Page Title	<signin_custom_page_title>	TIBCO Sign In
Menu Item 1 Text	<signin_menu_button1>	Summit 2013
Menu Item 1 Link	<signin_menu_button1_link>	https://www.tibco.com/connected-intelligence
Menu Item 2 Text	<signin_menu_button2>	TIBCO
Frame (Form Area) Title	<signin_custom_frame_title>	TIBCO Sign In
User Name Label	<signin_user_name_label>	Customer Name
Password Label	<signin_password_label>	Password
Remember Me Option	<remember_me_checkbox>	Remember me

Note: The Remember me option is not enabled by default, but is set in the example files, in case you enable it.

Change Dialog Elements	XML Tag	Example Value
User Name Label	<signin_change_password_user_name_label>	Customer Name:

4. Launch WebFOCUS in a browser. The following image appears:
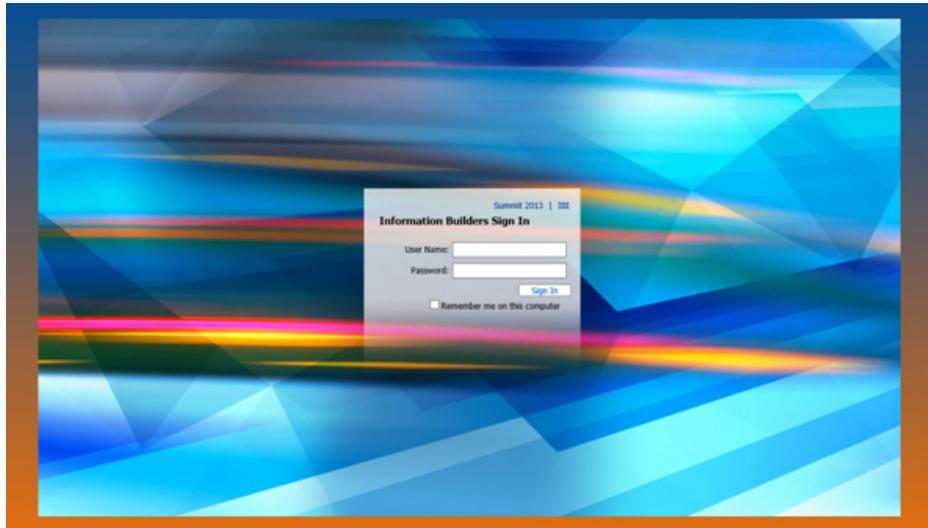
Procedure: How to Edit the CSS File

1. Browse to \ibi\WebFOCUS82\config\web_resource\signin\.

2. In a text editor, such as Notepad ++, edit the customsignin.css file.

3. Edit desired elements.

   Note:

   ❏ To test at any point, save and go to

   http://server:port/ibi_apps/

   ❏ Ensure that your browser zoom is at 100%.

   ❏ Positioning and styling information for all elements can be obtained by selecting the corresponding element inside of your imaging editing software. You may need to slightly adjust the positioning.

   ❏ Image URLs are relative to the directory containing the CSS file (\ibi \WebFOCUS82\config\web_resource\signin\). The URL to that directory is

   http://server:port/ibi_apps/web_resource/signin.

The following tables contain the changes you need to make to style the sign-in page and two dialog boxes. Before each table is a screenshot of what you should see when you complete those changes.
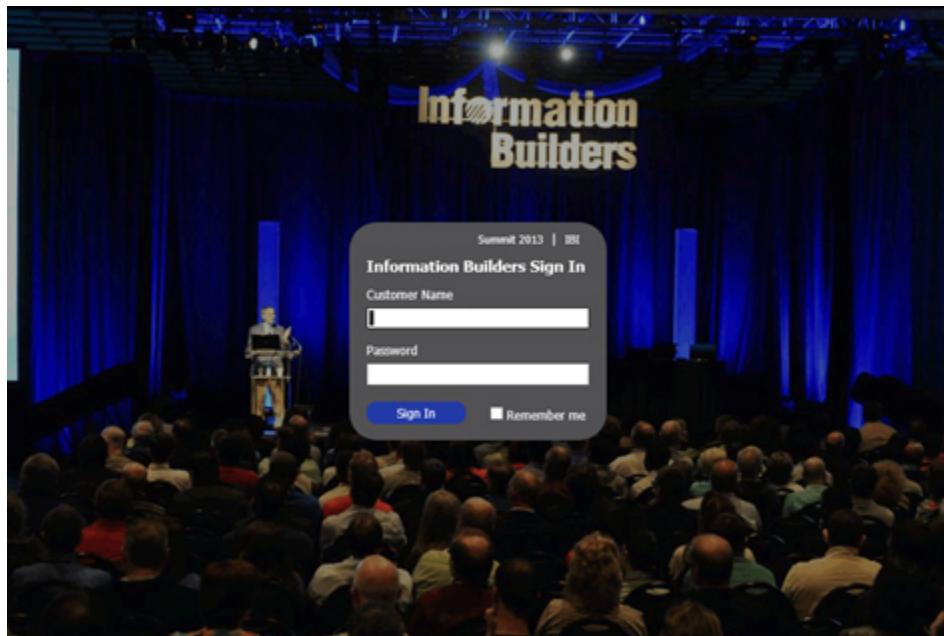
Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Page Background Color	body, html	background: #000000; Delete all gradient lines.
Sign In Background Image	.signin-background-image	background-image: url("images/customsignin.gif"); width: 960px; height: 638px;
	.signin-box	width: 960px; height: 638px;

Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Menu Bar Position	.signin-custom-menu-bar-position	top: 220px; left: 475px;
Menu Bar Styling	.signin-custom-menu-bar	color: #ffffff; font: 11px Tahoma, Verdana, Arial, Sans-Serif;
Menu Bar Separator Styling	.signin-menu-bar-separator	color: #ffffff; This class is located at the bottom of the CSS file.
Frame Title Position	.signin-custom-frame-title	top: 245px; left: 370px;
Frame Title Styling	.signin-custom-frame-label	color: #ffffff;
User Name Label Position	.signin-custom-username-label-position	text-align: left; top: 275px; left: 370px;
User Name	.signin-custom-	color: #ffffff;
User Name Input Control Position	.signin-custom-username-editbox	width: 221px; top: 295px; left: 370px; **Note:** To show all edges properly, the width must be at least 5px.
User Name Input Control Styling	.signin-custom-username-editbox-input	width: 216px;

Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Password Label Position	.signin-custom-password-label-position	text-align: left; top: 330px; left: 370px;
Password Label Styling	.signin-custom-password-label	color: #ffffff; Delete font-size:12px;
Password Input Control Position	.signin-custom-password-editbox	width: 221px; top: 350px; left: 370px; **Note:** Width is 5px more than that of the control to show all edges.
Password Input Control Styling	.signin-custom-password-editbox-input	width: 216px;
Remember Me Option Position	.signin-custom-remember-me-position	width: 216px; top: 388px; left: 490px; **Note:** Top is 2px less than the value in the artwork, due to HTML rendering. Width and left are matched to the input controls, with right text alignment to align right edge.
Remember Me Option Styling	signin-custom-remember-me	color: #ffffff; font-size:12px;
Sign In Button Position	.signin-custom-button-signin-position	color: #ffffff;

Main Page Elements	CSS Class or HTML Tag	Values to be Added, Changed, or Deleted
Sign In Button Styling	.signin-custom-button-signin	color: #ffffff; border: 1px solid #223AA7; border-radius: 10px;
Sign In Button Styling	a.signin-custom-button-signin	background-color: #223AA7; width: 96px; Delete background line. Delete padding-right line.
	a.signin-custom-button-signin span	padding: 3px 0px 3px 0px; Delete line-height line.

Error Message

The following image and table provide information on resolving error messages.

Error Message Elements	CSS Class or HTML Tag	Suggested Changes
Error Message Background Styling & Position	.signin-custom-error-position	width: 340px; height: 27px; top: 240px; left: 310px; background-color: #ff0000; border: 1px solid #ff0000; border-radius: 10px; behavior: url(web_resource/signin/PIE.htc);
Error Message Text Styling & Position	.signin-custom-error-message	color: #ffffff; font-size: 11px; top: 5px; width: 340px; text-align: center; Delete left: 20; **Note:** Top is the difference between the top of the box and the top of the text in your image editing software. Width here must match the width of class above.
Error Message Image	.signin-custom-error-image	display: none; **Note:** This was done to have no image.

Note: If you need to resize any objects, use the same class on which you set the position.

Change Password Dialog Box

Styling of elements in the Change Password dialog box, as well as the Already Signed in dialog box, are inherited from the main page elements. This means that the buttons, labels, and controls match to the main page.

The following image and table provide information on changing passwords.

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes

Dialog Styling and Position	.signin-custom-change-password-position	top: 220px;
		
		left: 353px;
		
		background-color: #565352;
		
		color: #ffffff;
		
		border: 1px solid transparent;
		
		border-radius:25px;
		
		-webkit-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		-moz-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		behavior: url(web_resource/signin/PIE.htc);
		
		Note: The visibility: hidden; line will need to be deleted, added again, or commented out during testing.

Dialog Title Bar	.signin-custom-change-password-title-position	background-color: #223AA7;
Dialog Title Icon	.signin-custom-change-password-title-image	visibility: hidden;
Sign In Button Position	.signin-custom-change-password-button-signin-position	height: 25px; top: 190px; left: 100px;

Change Password Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Cancel Button Position	.signin-custom-change-password-button-cancel-position	height: 25px; top: 190px; left: 200px;

Already Signed In Dialog Box

The following image and table provide information on working with the Already Signed In dialog box.

Already Signed In Dialog Elements	CSS Class or HTML Tag	Suggested Changes

Dialog Styling and Position	.signin-custom-user-already-signin-position	height: 130px;
		
		top: 305px;
		
		left: 332px;
		
		background-color: #565352;
		
		border: 1px solid transparent;
		
		border-radius:25px;
		
		-webkit-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		-moz-box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		box-shadow: 7px 7px 9px rgba(255, 255, 255, 0.75);
		
		behavior: url(web_resource/signin/PIE.htc);
		
		Note: The visibility: hidden; line will need to be deleted, added again, or commented out during testing.

Dialog Title Label	.signin-custom-user-already-signin-label-position	width: 270px; color: #ffffff;
Dialog Title Icon	.signin-custom-user-already-signin-title-image	visibility: hidden;
Sign In Button Position	.signin-custom-user-already-signin-button-signin-position	height: 25px; top: 100px; left:100px;

Already Signed In Dialog Elements	CSS Class or HTML Tag	Suggested Changes
Cancel Button Position	.signin-custom-user-already-signin-button-cancel-position	height: 25px; top: 100px; left: 200px;

Converting a Basic Portal to a Collaborative Portal

You can create two types of portals in WebFOCUS: basic and collaborative. Basic portals reside under the Portals node, in the Resources tree, while collaborative portals are part of the domains in your Repository. From the Business Intelligence (BI) Portal, you can access your collaborative portals under the Domains node. By default, both basic and collaborative portals are available. To change these defaults, an administrator can clear the corresponding check box in the WebFOCUS Administration Console. When the collaborative portal is enabled in your environment, the shortcut menu options for domains and folders include the ability to create new portals and individual pages. You can copy, paste, and move portals and pages between domains and folders, creating a fluid workflow and possibilities for sharing, securing, reusing, and modifying content.

The following topic provides steps that you can follow to convert a basic portal to a collaborative portal.

Procedure: **How to Convert a Basic Portal to a Collaborative Portal**

Follow the steps below to convert a basic portal to a collaborative portal.

1. Stop your Web Application Server.

2. Navigate to the following directory in your environment:

   drive: \ibi\WebFOCUS82\webapps\webfocus\WEB-INF\lib

3. Locate the following files:

   ❏ com_ibi_portal.jar

   ❏ ibi_gen.jar

4. Back up the files by adding .bak to the extension of each file. For example, com_ibi_portal.jar.bak and ibi_gen.jar.bak.

5. Place the new com_ibi_portal.jar and ibi_gen.jar files, provided in the hotfix package, in this directory.

6. Navigate to the following directory in your environment:

    drive: \ibi\WebFOCUS82\utilities\bip

7. Place the new portalV3toV4conversion.bat and portalV3toV4conversion.sh files, provided in the hotfix package, in this directory.

8. Start your Web Application Server.

    Note: If using WAR file deployment, the WAR files need to be updated and redeployed.

9. Launch WebFOCUS.

10. Note the basic portal that you want to convert to a collaborative portal.

11. Note the domain or folder where you want to place your converted collaborative portal.

12. Open the Command Prompt.

13. Navigate to the *drive:*\ibi\WebFOCUS82\utilities\bip directory, as shown in the following image.
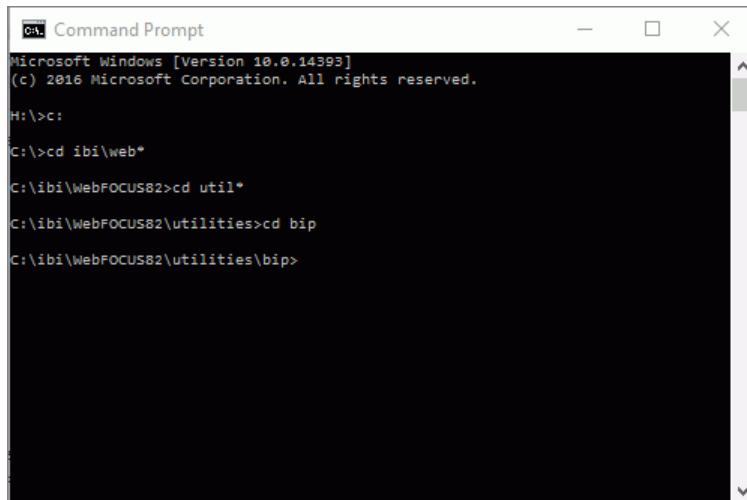
14. Type *dir* and press the Enter key.

The contents of the *drive:*\ibi\WebFOCUS82\utilities\bip directory appear, as shown in the following image.

15. Type *portalV3toV4conversion* and press the Enter key.

    The Portal Conversion Utility is initiated.

16. Follow the prompts to provide your credentials and names of the portal and desired path, as shown in the following image.

Note: If you are placing a converted collaborative portal in the Public folder, create a lower level folder inside the Public folder for the procedure to run correctly.

17. Press the Enter key.

18. Specify whether to include customizations by typing the number of the selected option and press the Enter key.

The Utility runs. At the end of the procedure, a notification appears, stating that the conversion completed, as shown in the following image.

Additionally, a log file named v3tov4_portal_conversion.<date>.log is created in the *drive:* \ibi\WebFOCUS82\logs directory.

19. Review the log file to check for errors.

20. Review the result of your conversion in WebFOCUS.

The new collaborative portal displays in the selected domain. The pages are saved in the Resources folder for this portal. The initial basic portal remains intact under the Portals node.

The following image shows an example of the successful conversion.
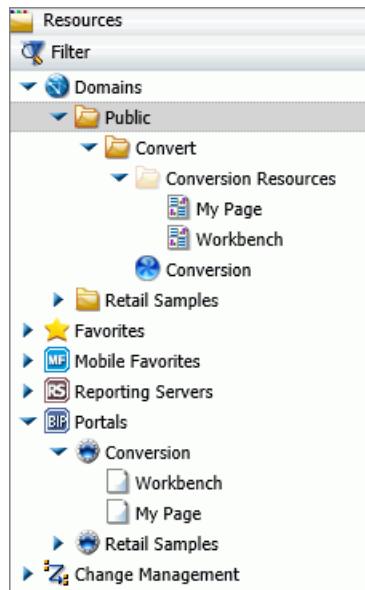
Working With Data

Learn how to upload your own data sources, connect, or join data.

In this chapter:

Working With Data Overview

There are two ways that you can connect to data in WebFOCUS. You can upload, append, or merge delimited, Excel, JSON, or XML files to a target environment, or you can connect to an existing table in a data source of your choice. Both processes begin with identifying and preparing the data that you want to use, and show you the default breakdown of your data as measures, dimensions, and hierarchies.

At similar points during the upload and connect processes, you can access options to transform your data beyond the default settings. This includes joining multiple tables into a cluster to create more fields and expand the scope of a synonym, editing geo roles and geo encoding to prepare the synonym for use in mapping and location analysis, data profiling and statistical analysis, changing columns or groups of columns into rows, and creating new or editing existing field roles.

Once a synonym is complete, you can upload it to a target environment or append it or merge it with an existing synonym. You can also save it as a template to allow repeated transformations if the same file is uploaded again in the future.

Understanding Your Data Structures

When you upload or connect to data in WebFOCUS, you create a synonym that can be used to build analytical content. Synonyms define unique names (or aliases) for each object that is accessible from the WebFOCUS Reporting Server. Synonyms are useful because they hide the underlying data source location and identity from client applications. They also provide support for extended metadata features of the WebFOCUS Reporting Server, such as virtual fields and additional security mechanisms.

Depending on the structure of the synonym that you are creating, the data inside a synonym is typically broken down into categorized roles, such as measures (facts), dimensions, hierarchy levels, and attributes.

A measure or fact is a numeric value, such as Gross Profit or Cost of Goods Sold, that you can aggregate. Numeric fields that cannot be summed, such as product number or order ID, are not categorized as measures. Instead, they may be used in the same way as dimension fields to analyze measures.

A dimension is a way to categorize data or sort output. You can use a dimension to analyze and compare measures. Usually, dimension fields are alphanumeric fields such as Product. Certain dimension fields can be organized into hierarchies to define the relationship between the fields. For example, a Geography hierarchy can contain the Region, Country, State, and City fields.

An attribute is a field or collection of fields that provide additional information about a dimension.

Using a WebFOCUS Business View panel, you can create a view of your data that represents its business use by creating virtual segments called folders and adding fields to these folders. You have the flexibility to create folders anywhere in the structure, as well as reusing fields in multiple folders. You can then categorize those folders and fields as measures, dimensions, hierarchy levels, or attributes.

Preparing Spreadsheets for Upload

Uploading data to WebFOCUS can be made easier if you first familiarize yourself with the data file, and then ensure that it is properly formatted for upload, so that geographic data, hierarchies, and other important aspects of your data are recognized. This is important because the synonym created for your uploaded data provides the basis for quality analytical content.

You can use the following techniques to prepare your data for the uploading process.

Naming Conventions and Microsoft Excel Sheet Names

For Excel spreadsheets, the name of the file is not important, but the name of the worksheet that contains your data is used to generate the synonym name. For the best results, note the following guidelines:

❏ Ensure that the worksheet name is meaningful. For example, Store Sales is better than Sheet1.

❏ Remove special characters from the worksheet name. Spaces will be converted to underscores, but all non-alphanumeric characters should be removed from the name, such as the following:

   /`~!@#$%^()-+={}|;,

❏ Remove or replace NLS characters with standard alphanumeric characters.

The following image shows a worksheet with a meaningful name, Retail Sales.
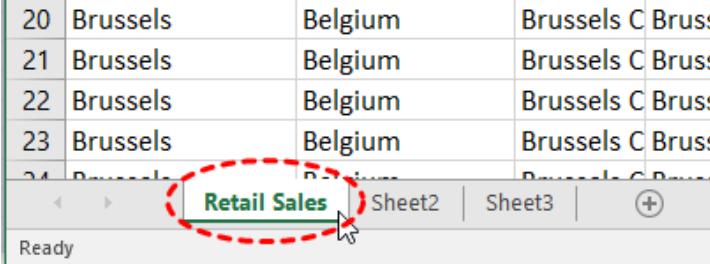
While you have an opportunity to edit the worksheet name within the Upload workflow, editing in Excel may be preferable. Note that your spreadsheet data and column titles may contain National Language Support data and special characters.

For CSV files, there is no worksheet name, so the CSV file name is used to generate the synonym name. For this reason, all of the limitations identified for Excel worksheet names apply to the CSV file name. Be sure to check and adjust the file name prior to the upload.

Removing Introductory Information

Sometimes, an Excel spreadsheet contains formatted headings in the first few rows. This information cannot be imported into WebFOCUS and should be removed. Delete the introductory rows and save the file before uploading. Alternatively, you can define a data range within your worksheet and leave the introductory information in place. The following image shows an example spreadsheet with a heading and subheadings highlighted.

Placing Column Titles in the First Row

For data to be useful in WebFOCUS, your data columns must be identified and properly described in the synonym that is generated during the upload process. You can make this easier by ensuring that the first few rows of your Excel spreadsheet contain column titles that are meaningful to you and to other users who will be using it. An example of meaningful column titles is shown in the following image.

If your spreadsheet has more than one row of column titles, WebFOCUS can merge the information when creating the synonym. You will be given an option to specify how many first rows of the Excel file contain title information in the Upload workflow.

Removing Aggregated Information

Excel spreadsheets may contain subtotals, grand totals, and other non-data row information. Data aggregation is performed by WebFOCUS, so you should remove these kinds of rows from your spreadsheet and save the file before uploading it.

Using Excel Name Ranges

Data ranges defined within your Excel worksheet can be helpful for the following reasons:

❏ Your worksheet may have introductory information, such as formatted headings or non-data information, in the first few columns.

❏ You may not want to import all of the data columns found on your worksheet.

You can define a data range in your worksheet to remove the data that you want WebFOCUS to process during upload, and leave your spreadsheet in its original format. An example of this is shown in the following image.

Preparing Hierarchical Data Columns

WebFOCUS recognizes columns of data that have hierarchical relationships. This is useful because the field names are arranged more logically in InfoAssist and because it facilitates Auto Drill capabilities in the content. Auto Drill allows you to drill up and down a field hierarchy automatically, making the content engaging and useful.

To help WebFOCUS recognize hierarchical columns correctly, ensure that the column titles begin with a common word or words, and are arranged left-to-right in the correct top-to-bottom direction, as shown in the following image. In the Upload workflow, you can define and edit dimension hierarchies prior to creating the synonym. You can also do this prior to the upload in Excel.

	A	B	C	D	E	F	G
1	Store Name	Product Category	Product Subcategory	Sale Date	Revenue	Cost of Goods	Gross Profit
2	Des Moines	Video Production	Video Editing	9/5/2013	3487.45	2288	1199.45
3	Dayton	Video Production	Video Editing	9/1/2013	13371.56	9459	3912.56
4	Dayton	Video Production	Video Editing	12/1/2013	19097.49	13386	5711.49
5	South Salt Lake	Video Production	Video Editing	12/1/2013	10763.83	8138	2625.83
6	Brussels	Accessories	Universal Remote Controls	3/2/2010	10060.72	7822	2238.72
7	Brussels	Accessories	Universal Remote Controls	4/1/2010	12839.15	9456	3383.15
8	Brussels	Accessories	Universal Remote Controls	5/1/2010	9848.13	6992	2856.13
9	Brussels	Accessories	Universal Remote Controls	6/1/2010	10357.7	7584	2773.7
10	Brussels	Accessories	Universal Remote Controls	7/1/2010	10979.11	8283	2696.11

Removing Date Formulas

Spreadsheets may contain a date column where the values are computed by Excel using a formula. You need to convert these computed values into simple values before uploading a spreadsheet. To remove date formulas, select a column, right-click, and then click *Copy*. Then, right-click the selected column again and select *Values*. This can be found under the Paste Options menu, which is highlighted in the following image. Menu options may vary by Excel release. Now you can see that each cell contains a date value, and WebFOCUS can decompose your dates into useful components for use in InfoAssist.

Uploading Data Files

You can upload, append, or merge delimited, Excel, JSON, or XML files to a target environment using WebFOCUS. Your file is initially loaded to a temporary environment, where you can modify and enhance your data before loading it to permanent storage.

A synonym is automatically generated for the uploaded data file. In the data preparation step, prior to actually uploading the data, you can enhance and edit the generated synonym.

After you upload a new file, you can append a file by adding new data to an existing synonym, without changing the structure. This option is useful when you are working with a complex or heavily edited synonym, by allowing you to retain all previous edits and data transformations. You can also merge a file with your data and enhance the existing structure.

The procedures in this section provide step-by-step instructions for uploading, appending, and merging files.

Procedure: **How to Upload Data Files**

1. You can upload data in the following ways:

   ❑ From the WebFOCUS Home Page, click the *Data* tab on the Action Bar, and then click

      the *Upload Data* button .

   ❑ From the WebFOCUS Home Page, click the *Designer* tab on the Action Bar, then click the *Workbook* or *Chart* button, and then click *Upload* in the Open dialog box.

   ❑ From the WebFOCUS Home Page, click the *InfoAssist* tab on the Action Bar, then click the *Chart*, *Visualization*, *Report*, or *Document* button, and then click *Upload Data* in the Open dialog box.

   ❑ From the Legacy Home Page, in the Resources tree, right-click a domain or folder, point to *Upload*, and then click *Data*.

   Note: The *Report* button appears in the *Designer* category if you have enabled the Technical Preview feature.

   Note: After you upload your data, a shortcut to that data is added to the same folder location in the repository from where you clicked the Upload Data button.

   The Upload screen opens.

2. Click the desktop file type in the Upload panel that you want to upload, and navigate to the location of the file on your machine.
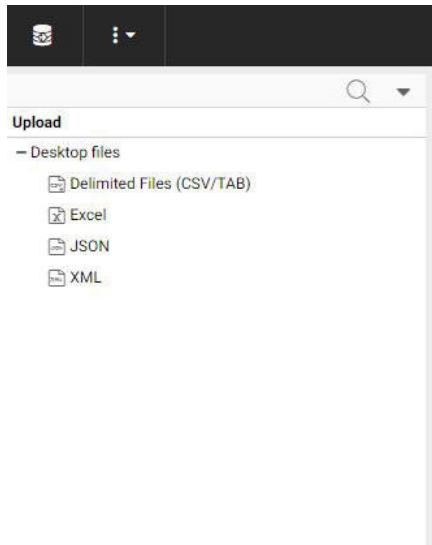
You can select from the following file types to upload: Delimited Files, Excel, JSON, or XML.

Delimited, JSON, and XML files are individual data sources. An Excel file can be a single-worksheet or a multiple-worksheet file.

The default data preparation screen opens, as shown in the following image.

Your data is loaded into temporary storage and default data preparation is shown in a Business View panel, a modeling panel, and an output panel. There are many options for reviewing and modifying your data by editing the synonym before you upload it to the target environment.

Note: Clicking the data prep icon highlighted on the ribbon takes you to a further data preparation workflow.

The Business View panel is shown in the following image.
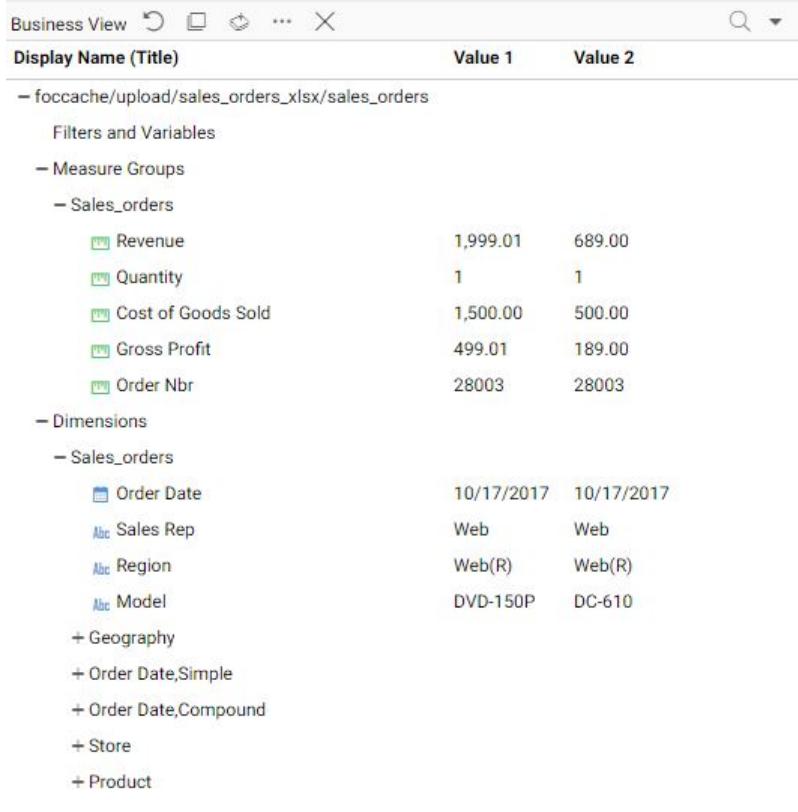
Business View			
Display Name (Title)		Value 1	Value 2
— foccache/upload/sales_orders_xlsx/sales_orders			
Filters and Variables			
— Measure Groups			
— Sales_orders			
Revenue		1,999.01	689.00
Quantity		1	1
Cost of Goods Sold		1,500.00	500.00
Gross Profit		499.01	189.00
Order Nbr		28003	28003
— Dimensions			
— Sales_orders			
Order Date		10/17/2017	10/17/2017
Sales Rep		Web	Web
Region		Web(R)	Web(R)
Model		DVD-150P	DC-610
+ Geography			
+ Order Date,Simple			
+ Order Date,Compound			
+ Store			
+ Product			

In the Business View panel, data fields are categorized as Measures, based on numeric data types, or as Dimensions, based on non-numeric data types.

You can right-click fields to change roles, create filters and expressions, pivot, or profile data, among other options, as shown in the following image.
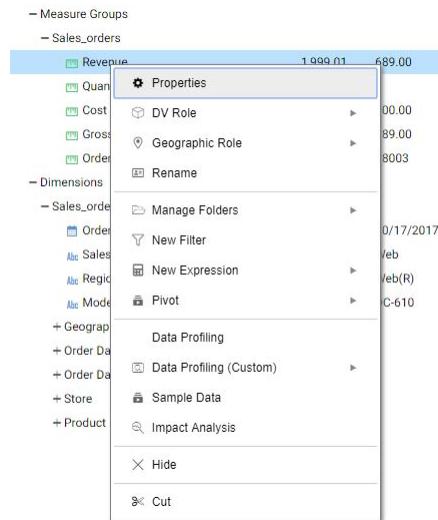
The modeling view panel is shown in the following image.
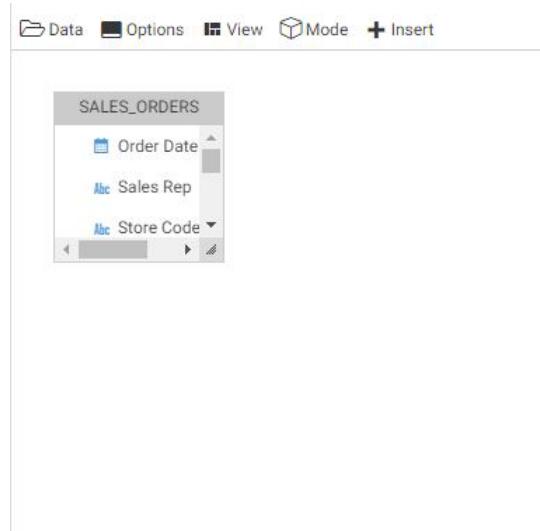
In the modeling view panel, you can drag and drop synonyms from the Data panel onto the canvas to create a JOIN structure, change Join Editor options, and insert a child or root. An expanded Data panel and a canvas JOIN structure is shown in the following image.
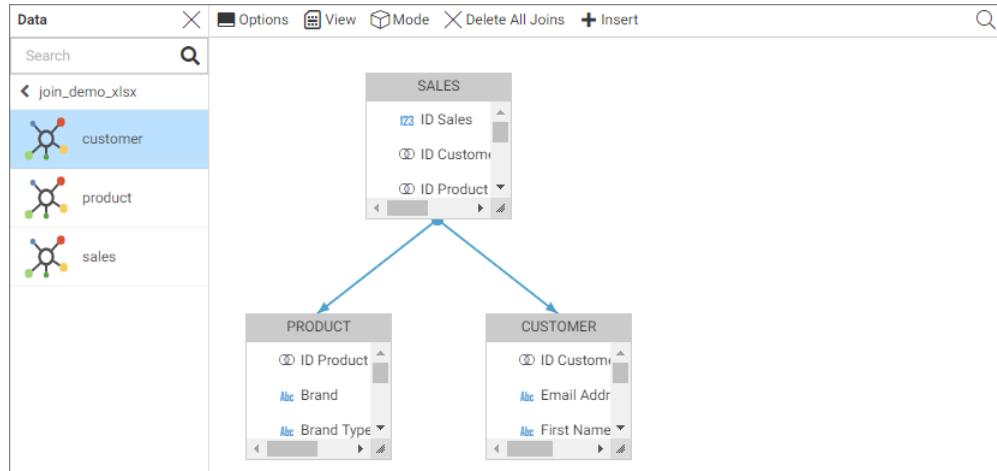
Note: Default data preparation is shown only for single-sheet Excel and other file types. If uploading an Excel file with multiple-worksheets, you can select the worksheet for default preparation by dragging it from the Data panel to the canvas in the modeling view panel.

The output view panel is shown in the following image.

In the output view panel you can work in an Excel-like mode. The options in each column drop-down menu are the same as the right-click options in the Business View panel.

3. If you are satisfied with how your data is displayed, click the arrow icon highlighted on the ribbon to load.

The Target Load Options dialog box opens, as shown in the following image.

Load Options	✕

? Load Option	New/Replace ▼
? Adapter	MS SQL Server OLE DB ▼
? Connection	7706_ms2008_retail ▼
? Synonym Application	ibisamp ...
? Synonym	sales_orders
? Table Name	sales_orders
? Bulk Load	☑
? Key columns derived from	No Key ▼
? Apply Filters	☑

Proceed to Load Cancel
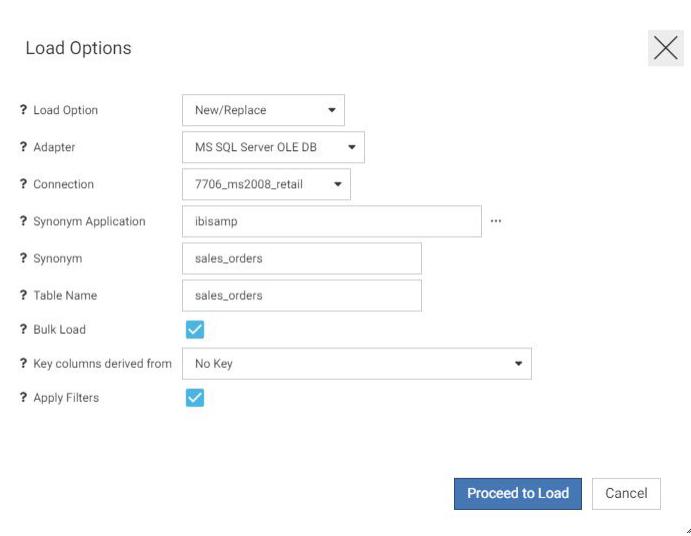
Note: The Apply Filters check box is selected be default. If you have created filters, they will be applied automatically to the load process. If you do not want filters applied automatically, but do want them applied to your created metadata, clear the Apply Filters check box.

4. If the information is correct, click *Proceed to Load*.

You are returned to the Home Page. A message displays indicating your new data is available. A shortcut to your new data is added to the repository folder from where you uploaded your data, as shown in the following image.
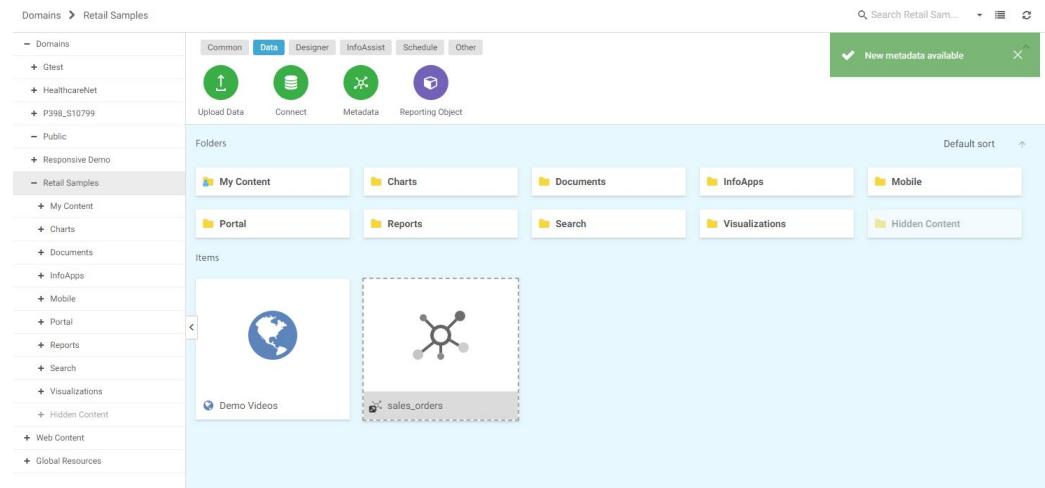
From the shortcut menu options, you can create new content by selecting *New*, or edit your data by selecting *Edit* as shown in the following image.
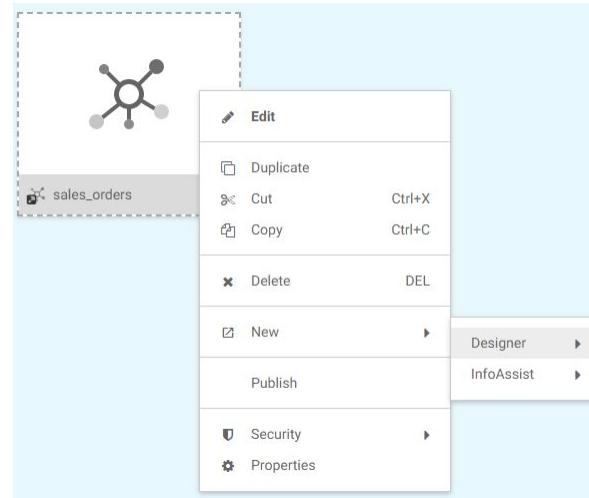
Procedure: **How to Append New Data to an Existing Synonym**

1. On the default data preparation screen, click the drop-down menu icon from the ribbon and then click *Load Options* from the drop-down menu.

   The Target Load Options dialog box opens.

   Note: By default, the Apply Filters check box is selected. If you have created filters, they will be applied automatically to the load process. If you do not want filters applied automatically, but do want them applied to your created metadata, clear the Apply Filters check box.

2. From the Load Option drop-down list, click *Append to Existing*.

   The Select Target Synonym dialog box opens.

3. In the Select Target Synonym dialog box, select the synonym to which you want to append your data.

4. Click *OK*.

   The Target Load Options dialog box opens.

5. Click *OK*.

   The Merge Editor dialog box opens.

6. In the Merge Editor dialog box, you can make additional changes to how your data is appended, for each column in the spreadsheet.

   You must create at least one Insert expression.

7. Click *OK*.

   If the load is successful your data is displayed.

8. If you are satisfied with how your data is displayed, click the arrow icon highlighted on the ribbon to load.

   You are returned to the Home Page. A shortcut to your new data is added to the repository folder from where you uploaded your data, as shown in the *How to Upload Data Files* procedure.

Procedure: **How to Merge New Data With an Existing Synonym**

1. On the default data preparation screen, click the drop-down menu icon from the ribbon and then click *Load Options* from the drop-down menu.

   The Target Load Options dialog box opens.

Note: By default, the Apply Filters check box is selected. If you have created filters, they will be applied automatically to the load process. If you do not want filters applied automatically, but do want them applied to your created metadata, clear the Apply Filters check box.

2. From the Load Option drop-down list, click *Merge into Existing*.

   The Select Target Synonym dialog box opens.

3. In the Select Target Synonym dialog box, select the synonym to which you want to merge your data.

4. Click *OK*.

   The Target Load Options dialog box opens.

5. From the If the record exists drop-down list, click the action you want to occur when a record in the new spreadsheet matches a record in the existing data. You can choose to reject the matching record, update the existing record, or delete the existing record. By default, *Update the existing record* is selected.

6. From the If the record does not exist drop-down list, click the action you want to occur when a record in the new spreadsheet does not match the record in the existing data. You can choose to include or reject the record that does not match the existing record.

7. Click *OK*.

   The Merge Editor dialog box opens.

8. In the Merge Editor dialog box, you can make additional changes to how your data is merged, for each column in the spreadsheet.

   You must create at least one Matching expression.

9. Click *OK*.

   If the load is successful your data is displayed.

10. If you are satisfied with how your data is displayed, click the arrow icon ▶ highlighted on the ribbon to load.

    You are returned to the Home Page. A shortcut to your new data is added to the repository folder from where you uploaded your data, as shown in the *How to Upload Data Files* procedure.

Uploading Images and Documents

In addition to uploading delimited, Excel, JSON, or XML files, you can upload other files, such as images and documents. These files can be used to enhance visualizations and shared with other users and groups.

Procedure: **How to Upload an Image**

1. From the Resources tree, right-click a domain or folder, point to *Upload*, and then click *Image*.

    The Image upload dialog box opens, as shown in the following image.

    Note: Upload options may appear differently across browsers, because each browser utilizes its own upload dialog box.

2. Click *Browse* to select your image. You can upload the following formats: .jpg, .png, and .gif.

3. Select *Publish Image(s)* to provide other users with access to your images.

4. Click *Upload*.

    A confirmation window opens.

5. Click *OK*.

Procedure: **How to Upload a Document**

1. From the Resources tree, right-click a domain or folder, point to *Upload*, and then click *Document*.

The Document upload dialog box opens, as shown in the following image.

Note: Upload options may appear differently across browsers, because each browser utilizes its own upload dialog box.

2. Click *Browse* to select your document.

3. Select *Publish Document(s)* to provide other users with access to your documents.

4. Click *Upload.*

   The confirmation window opens.

5. Click *OK*.

Pivoting Data Columns Into Rows

Some data files may contain repeating columns, such as sales figures for a series of years. There may even be repeating column groups, such as both budget and actual figures for a series of years.

When a data source includes multiple measure columns that provide values for the same type of measurement, it may be useful to pivot these columns into rows. This results in a simpler table with fewer columns, and with more dimension fields for sorting your data.

When uploading data, you can use the pivot option to transform these columns or groups of columns into rows, as shown in the following image.
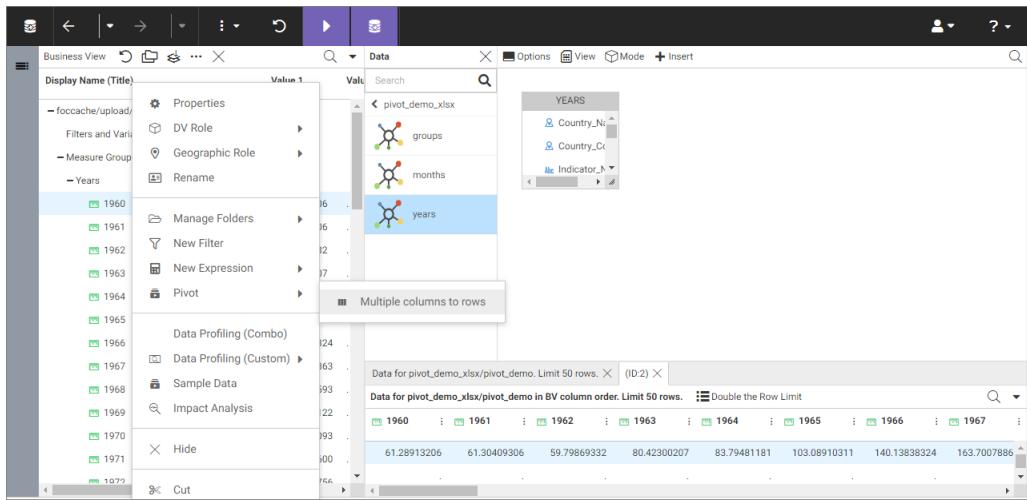
Note: The pivot option is also available when creating or editing metadata.

Procedure: **How to Pivot Columns Into Rows**

1. Right-click a field name in the Business View panel, point to *Pivot*, and then click *Multiple columns to rows*.

   The Pivot Columns to Rows dialog box opens.

2. In the Pivot Type drop-down menu, select *Repeating column*. This is the default setting.

3. In the First column drop-down menu, select the first column in the range of repeating columns.

4. In the Last column drop-down menu, select the last column in the range of repeating columns.

5. In the Column Title for Pivoted Value, type the new column title that reflects the numeric field that you are creating.

6. In the Column Title for Pivoted Key field, which will be a new dimension field, type the new column title that represents the repeating columns that you are pivoting into rows.

7. Leave the Formula for Pivoted Key field value unedited. This value is automatically generated and should not be changed.

An example of the completed configuration for pivoting columns is shown in the following image.

Pivot Column(s) to Rows in synonym years   ✕

Selected Parameters		⟩

? **Pivot Type**	Repeating column ▾	
? First column	1960 ▾	
? Last column	2012 ▾	
? Column Title for Pivoted Value	Amount	Example: AMOUNT
? Column Title for Pivoted Key	Year	Example: STMT_YEAR
? Formula for Pivoted Key	1960 + ORDER - 1	

                                                        Cancel   ▶ OK

8. Click *OK*.

    The repeating columns now display as rows.

    Note: To revert your pivoting changes, right-click the synonym on the Join Editor canvas, and click *Remove Pivot*.

Procedure: **How to Pivot Column Groups into Rows**

1. Right-click a field name in the Business View panel, point to *Pivot*, and then click *Multiple columns to rows*.

    The Pivot Columns to Rows dialog box opens.

2. In the Pivot Type drop-down menu, select *Repeating group of columns*.

3. In the Number of groups field, specify the number of groups of columns that you are pivoting.

4. In the first column in group drop-down menu, select the first column of the first group in the range of repeating column groups.

5. In the last column in group drop-down menu, select the last column of the first group in the range of repeating column groups.

    Note: the range of the first group is repeated for the number of groups of columns that you earlier specified.

6. In the Column Title for Pivoted Value, type the new column title that will be used for all the columns across the repeating groups. Separate each measure column title by forward slashes, for example: Planned/Actual.

7. In the Column Title for Pivoted Key field, type the new column title that represents the repeating columns that you are pivoting into rows.

8. Edit the automatically generated formula in the Formula for Pivoted Key field by clicking the ellipsis button.

   The Edit Formula dialog box opens, as shown in the following image.
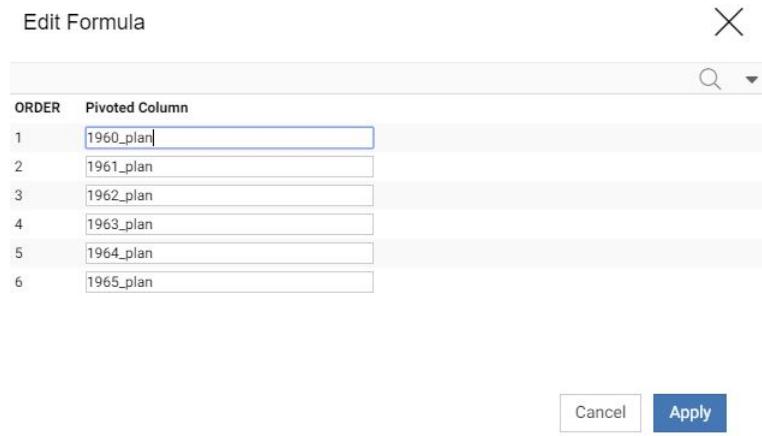
Make sure there are no repetitive alphanumeric values in the Pivoted Column field. In the example above, delete _plan in each field to show only the year.

9. Click *Apply*.

   An example of the completed configuration for pivoting groups of columns is shown in the following image.
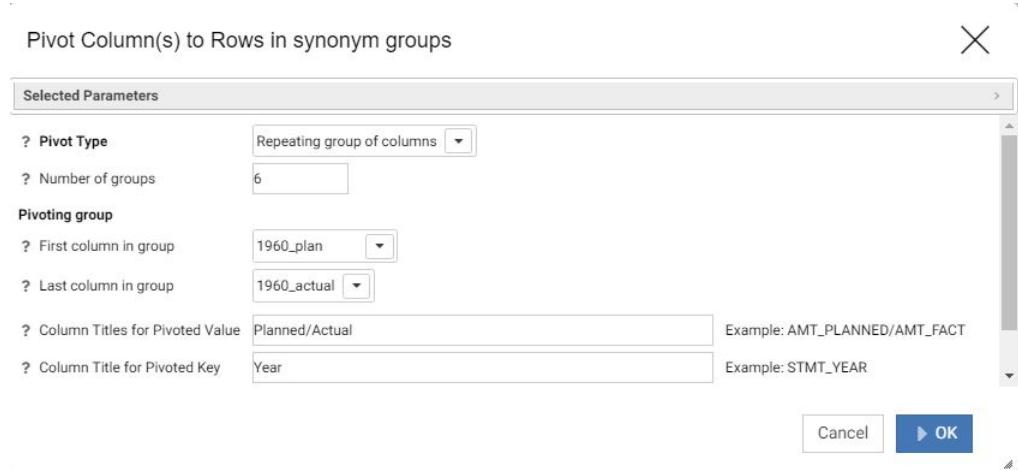
10. Click *OK*.

   The repeating groups of columns now display as rows.

   Note: To revert your pivoting changes, right-click the synonym on the Join Editor canvas, and click *Remove Pivot*.

Connecting to Data Sources

You can configure adapters and connect to data sources across your enterprise, which you can then use to build reports, charts, and visualizations using WebFOCUS Designer or other tools. You can also create a synonym for one or more data objects, or create cluster synonyms for select objects assigned as facts or dimensions.

You can access the connect to data workflow in the following ways:

❏ From the WebFOCUS Home Page, click the *Data* tab on the Action Bar, and then click the

   Connect button .

❏ From the WebFOCUS Home Page, click the *Designer* tab on the Action Bar, click the *Workbook* or *Chart* button, and then click *Connect* in the Open dialog box.

❏ From the WebFOCUS Home Page, click the *InfoAssist* tab on the Action Bar, click the *Chart*, *Visualization*, *Report*, or *Document* button, and then click *Connect to Data* in the Open dialog box.

❏ From the Legacy home page, in the Resources tree, right-click a domain or folder, point to *Metadata*, and then click *Connect to Data*.

Note: The *Report* button appears in the *Designer* tab if you have enabled the Technical Preview feature.

Configuring Adapters

The Connect to Data workflow creates a connection to your data, which will allow you to modify your data for use in WebFOCUS. You can configure a new adapter or connection, add a connection to an existing adapter, or change adapter connections.

The initial Connect to Data screen displays a panel for selecting or configuring adapters, and also for uploading data, as shown in the following image:
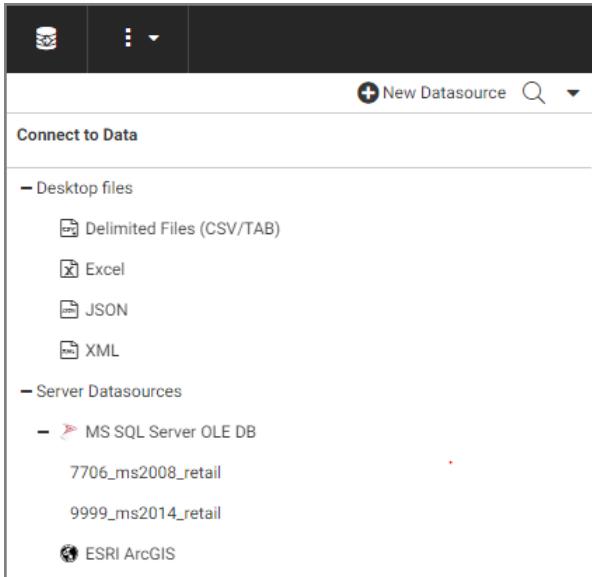
❑ **Desktop files.** You can upload, append, or merge delimited, Excel, JSON, or XML files to a target environment from this area of the Connect to Data workflow.

❑ **New Datasource.** Displays all available adapters. If a connection has already been configured for an adapter, a check mark is displayed next to the adapter name. If the adapter has multiple versions, you can select which version to configure when you right-click the adapter name or click its drop-down arrow. You can select a category of adapter to display from a categorical drop-down list. A search option is also available.

❑ **Server Datasources.** Displays all adapters and connections that have been configured. You can create synonyms and cluster business views from this panel, add new or duplicate connections, remove connections, and view and edit properties.

Procedure: **How to Configure a New Adapter/Connection**

1. In the Connect to Data panel, click *New Datasource*.

The Available adapter dialog box opens, as shown in the following image.
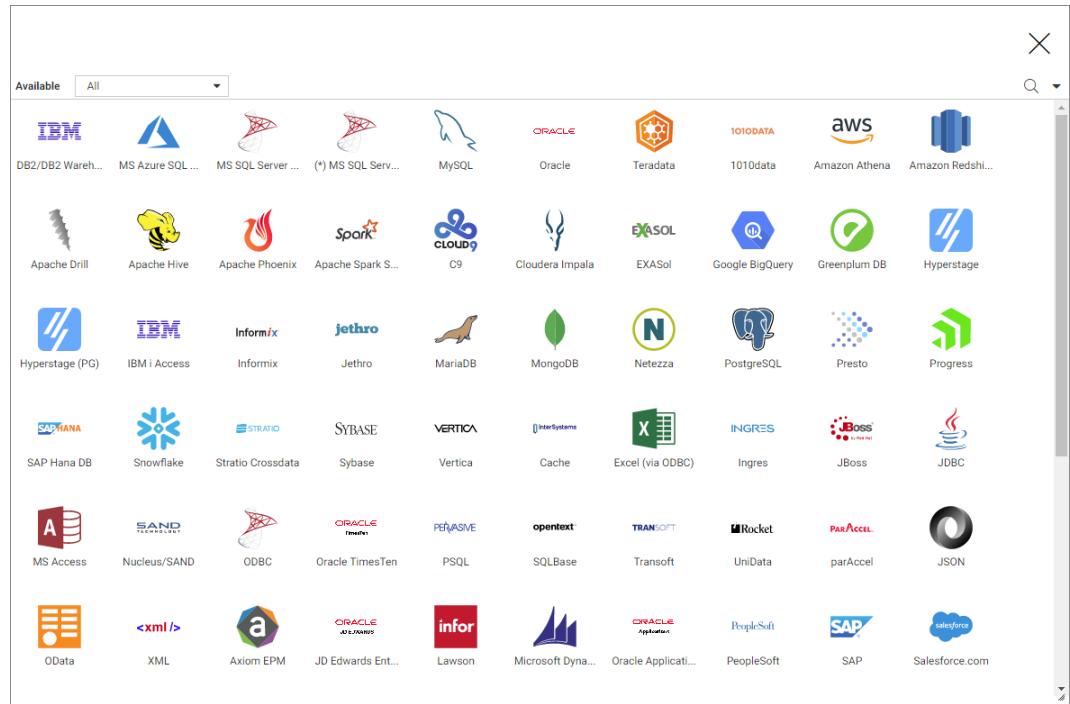
2. Right-click an adapter name and click *Configure*.

   Note: If the adapter has multiple versions, right-click the adapter name and select which version to configure.

   The Configuration dialog box opens, as shown in the following image.
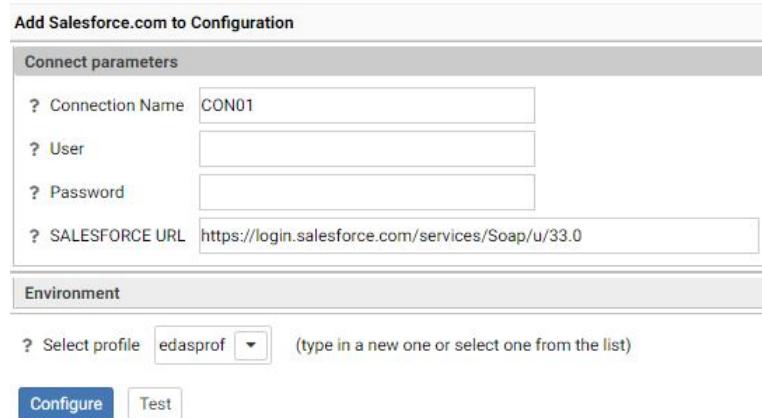
3. Enter the parameters for the specific adapter in the dialog box.

4. Click *Test*, if available, to test your configuration.

5. Click *Configure*.

   Note: Once configured, the adapter appears beneath Server Datasources in the Connect to Data panel.

Procedure: **How to Add a Connection**

1. In the Connect to Data panel, under Server Datasources, right-click a configured adapter.

   A shortcut menu opens, as shown in the following image.
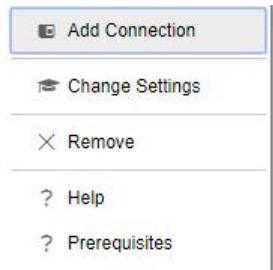
   Note: These menu options are for a SQL adapter. Options may differ for different categories of adapters.

2. Click *Add Connection*.

3. Enter the parameters for the specific adapter in the dialog box.

4. Click *Test*, if available, to test your configuration.

5. Click *Configure*.

Procedure: **How to Change a Connection**

1. In the Connect to Data panel, under Server Datasources, right-click a configured adapter.

2. Click *Properties*.

3. Change the parameters for the specific connection in the dialog box and click *Configure*.

Creating Synonyms

During the Connect to Data workflow, you can create Base or Cluster Synonyms of your data. A Cluster Synonym is made up of multiple tables that are connected by Joins. You can choose to enhance your synonym when initially you create it, by modifying field names, assigning geographic roles, creating expressions, and more, or you can edit it at a later time.

Procedure: How to Create a Synonym

1. In the Connect to Data panel, under Server Datasources, right-click a configured adapter.

   A shortcut menu opens, as shown in the following image.
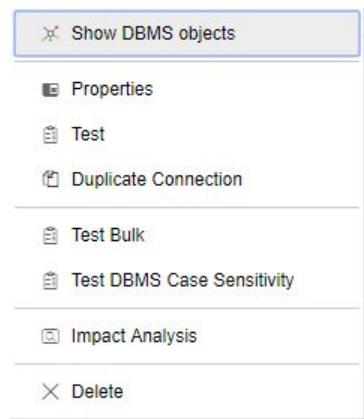
   Note: These menu options are for a SQL adapter. Options may differ for different categories of adapters.

2. Click *Show DBMS objects* from the shortcut menu.

The Available Objects panel opens, as shown in the following image.

3. Select from the available object Filter options.

    You can now create a cluster synonym or a base synonym, following the steps below.

Procedure: **How to Create a Cluster Synonym**

1. Select the *Cluster Synonym* radio button. This is the default setting.

    Available Cluster Synonym candidates display.

2. Select the Fact or Dimension of the object for which you want to create a Cluster Synonym, as shown in the following image.
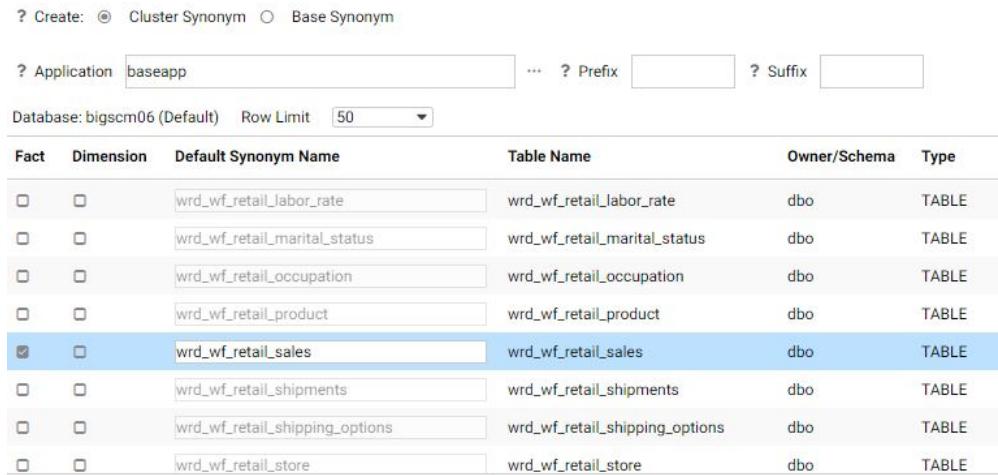
? Create: ◉ Cluster Synonym ○ Base Synonym					

? Application baseapp   ⋯ ? Prefix [   ]   ? Suffix [   ]

Database: bigscm06 (Default)   Row Limit [50   ▼]

Fact	Dimension	Default Synonym Name	Table Name	Owner/Schema	Type
☐	☐	wrd_wf_retail_labor_rate	wrd_wf_retail_labor_rate	dbo	TABLE
☐	☐	wrd_wf_retail_marital_status	wrd_wf_retail_marital_status	dbo	TABLE
☐	☐	wrd_wf_retail_occupation	wrd_wf_retail_occupation	dbo	TABLE
☐	☐	wrd_wf_retail_product	wrd_wf_retail_product	dbo	TABLE
☑	☐	wrd_wf_retail_sales	wrd_wf_retail_sales	dbo	TABLE
☐	☐	wrd_wf_retail_shipments	wrd_wf_retail_shipments	dbo	TABLE
☐	☐	wrd_wf_retail_shipping_options	wrd_wf_retail_shipping_options	dbo	TABLE
☐	☐	wrd_wf_retail_store	wrd_wf_retail_store	dbo	TABLE

3. You can change the name of any selected Base synonym in the Default Synonym Name field.

4. To display related Dimensions for a Fact table, right-click a selected object name, and select *Show Related Dimensions*.

5. To add related Dimensions for a Fact table, select *Add Related Dimensions*.

   Note: Show and Add Related Dimensions options are only available for Relational data sources if Foreign Key to Primary key information is available in the RDBMS.

The related dimensions are automatically selected, as shown in the following image.


6. Click the arrow icon ▶ from the ribbon to proceed.

Your Cluster Synonym selection displays, as shown in the following image.
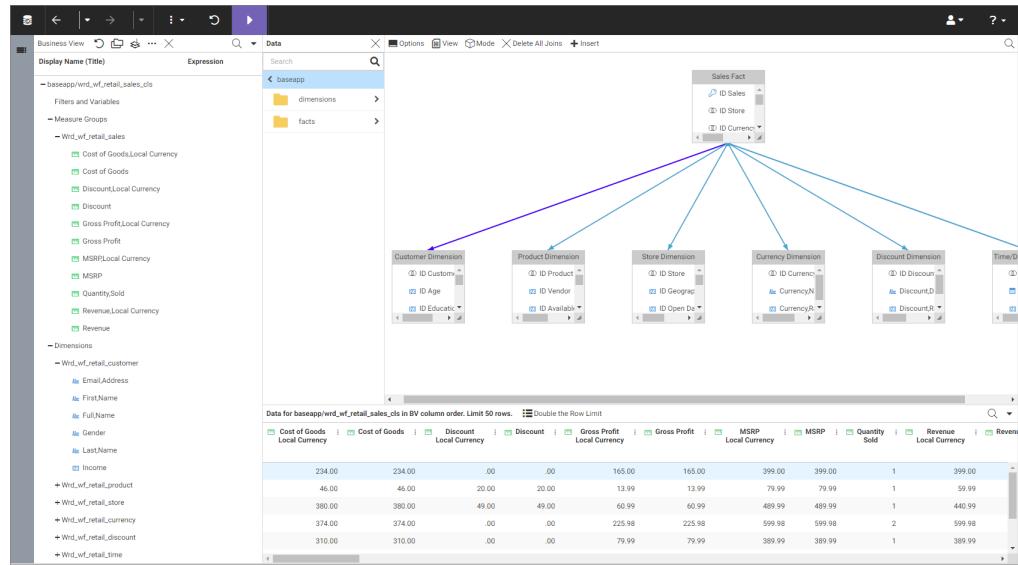
7. Enhance your Cluster Synonym from the panels or ribbon, as needed.

8. Click the arrow icon ▶ from the ribbon to proceed.

The Save As dialog box opens, as shown in the following image.
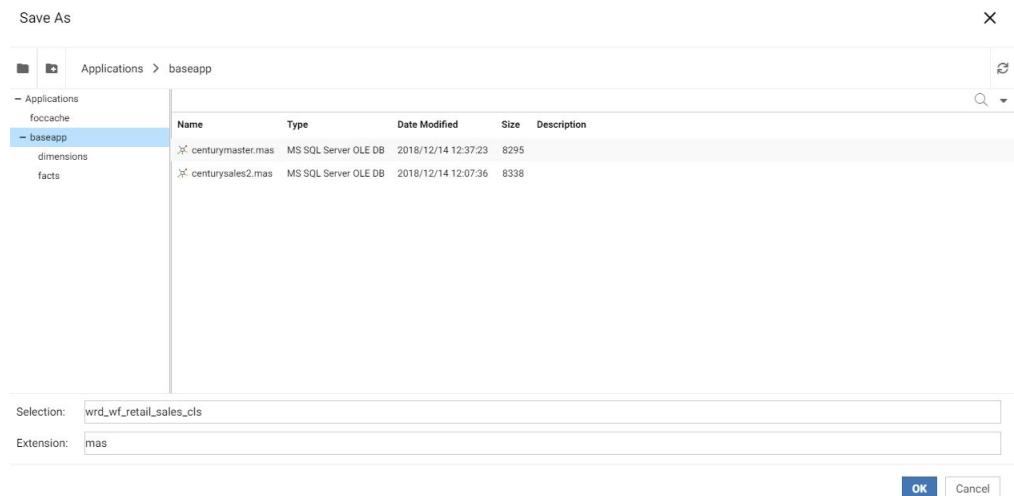
9. You can change the name of your Cluster Synonym in the Selection field.

10. Click *OK*.

    You are returned to the Home Page. A message displays indicating your new data is available. A shortcut to your new synonym is added to the repository folder from where you connected to data, as shown in the following image.
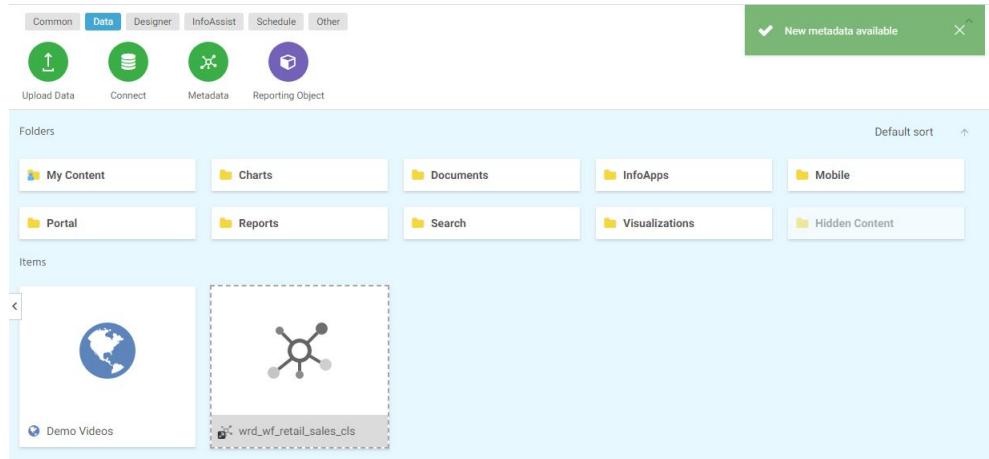
From the shortcut menu options, you can edit your synonym by selecting *Edit*, or create new content by selecting *New*, as shown in the following image.
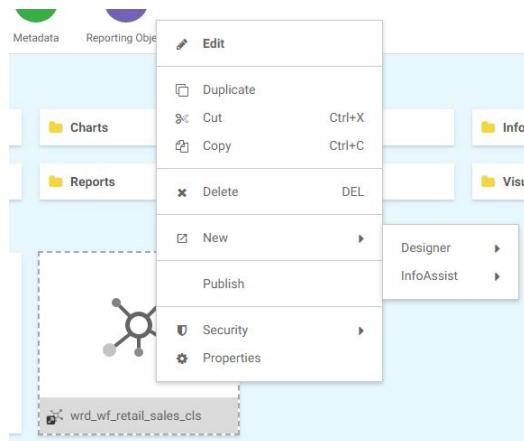
Procedure: How to Create a Base Synonym

1. Select the *Base Synonym* radio button.

   Available Base Synonym candidates display.

2. Select the object for which you want to create a Base Synonym, as shown in the following image.

3. Click the arrow icon from the ribbon to proceed.

The Table/Column and Business View panels for your Base Synonym selection display, as shown in the following image.

4. Enhance your Base Synonym from the panels or ribbon, as needed.

5. Click the arrow icon from the ribbon to proceed.

The Save As dialog box opens, as shown in the following image.
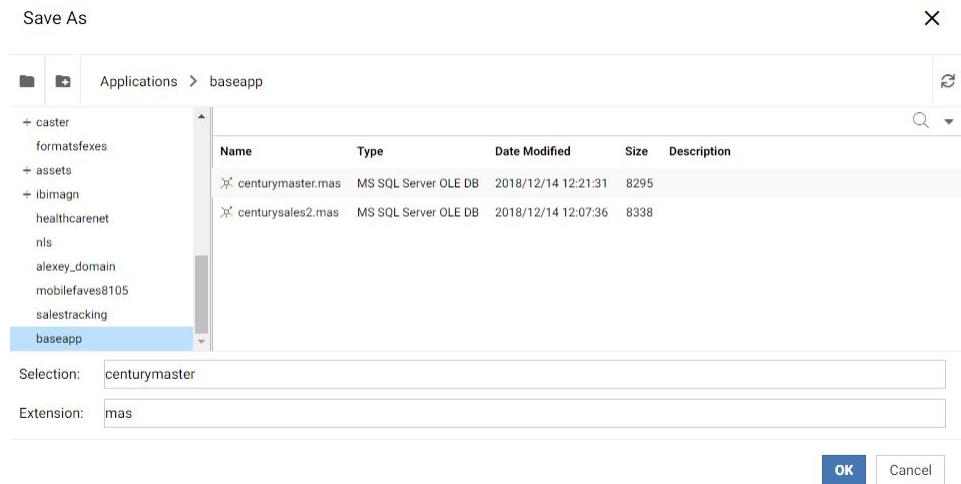
6. You can change the name of your Base Synonym in the Selection field.

7. Click *OK*.

    You are returned to the Home Page. A message displays indicating your new synonym is available. A shortcut to your new synonym is added to the repository folder from where you connected to data, as shown in the following image.
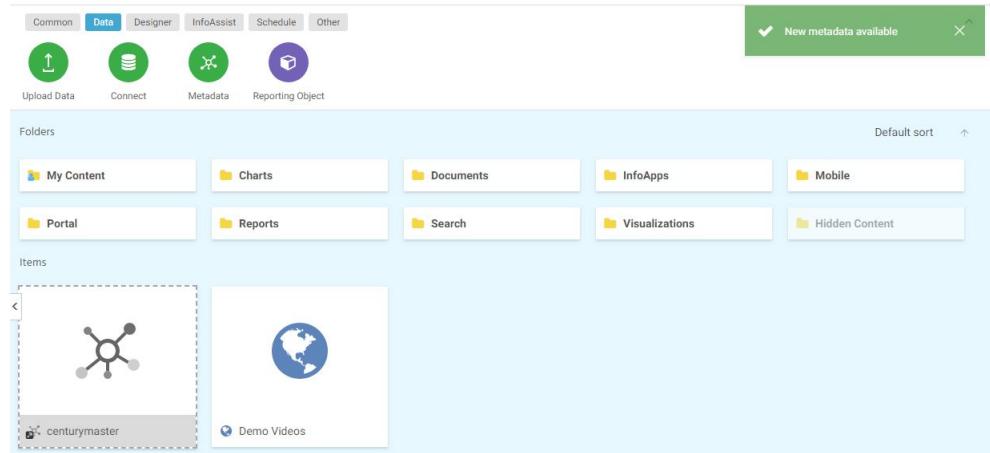
From the shortcut menu options, you can edit your synonym by selecting *Edit*, or create new content by selecting *New*, as shown in the following image.

Editing Business Views

When you are working within a WebFOCUS Business View panel, you can edit your data by selecting from folder and field shortcut menu options. These options are also available in the Table/Column and Output views.

Creating Folders

You can create folders to organize your data. Folders function as segments to provide a view of the synonym, and define the accessible fields and their relationships. Folder relationships are the same as segment relationships, with parent folders, child folders, and sibling folders. Once you create a new folder, you can add data fields and assign roles. Synonym folder structures can be predefined or flexible.

Predefined folder structures are categorized as Measure Groups, Dimensions, Hierarchies, and Attributes, and are created by default when using the WebFOCUS Upload or Connect to Data workflows. In a predefined folder structure, a Measure Group contains measures or facts that are numeric values, such as Gross Profit or Cost of Goods Sold, that you may want to aggregate. All numeric values that can logically be summed can be categorized as Measures. All other fields are categorized as Dimensions, Hierarchies, or Levels.

Flexible folder structures allow you to insert any number of folders at any level to represent the Business need. A folder can contain any type of field categorized as a Measure or Dimension. However, it is good practice to keep different field types in separate folders.

Within a WebFOCUS Business View panel, you can create a new folder by right-clicking a folder or field, pointing to *Manage Folders*, and then clicking *New Folder*, as shown in the following image of a predefined folder structure.

When editing or creating a synonym, you can click the icons at the top of the Business View panel to create a predefined folder structure, as shown in the following image.
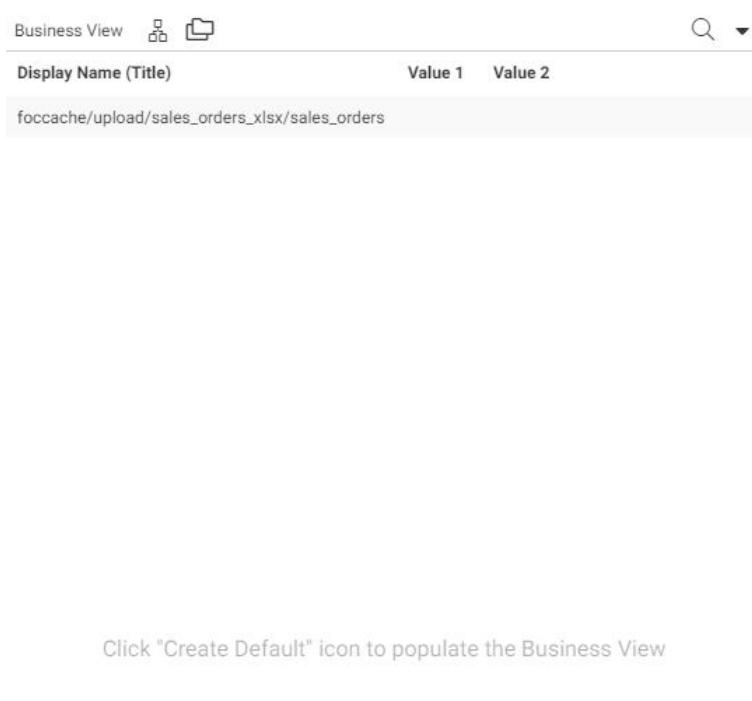
Click the *Default* icon to create a populated predefined folder structure. Click the *Template* icon to create an unpopulated predefined folder structure.

Note: You can start to create a new flexible folder structure by right-clicking the synonym name path, pointing to *Manage Folders*, and then clicking *New Folder*, as shown in the following image.
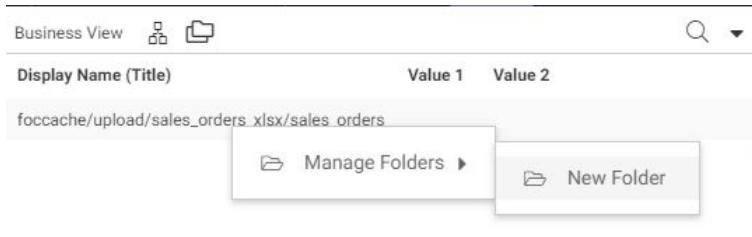
Assigning DV Roles

Categorization can be assigned using the DV Role option. When editing a synonym within a WebFOCUS Business View panel, you can assign a DV role to a folder or field by right-clicking the folder or field, clicking *DV Role*, and then clicking a DV Role option, as shown in the following image of a predefined folder structure.
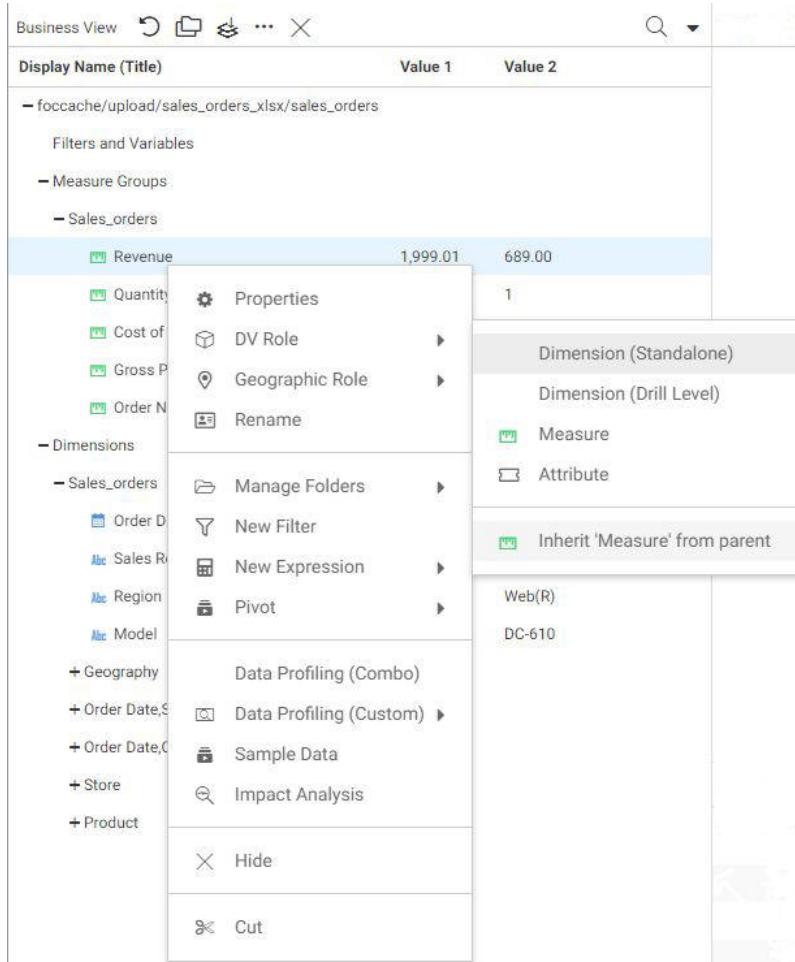
You can explicitly assign a DV Role to a folder or field, or have it automatically inherit a role from its parent. If you explicitly assign a DV Role, that role moves with the object when dragged to a different location within the Business View structure. If you do not explicitly assign a DV Role, the role changes when the object is dragged under a new parent. However, if the object is dragged under a parent with a field with a Drill Level role, it inherits that role.

A folder can only have one drill level field hierarchy. However, you can use the same fields in multiple hierarchies by placing each hierarchy in a separate folder. A folder with a drill level hierarchy is not limited to the hierarchy and can contain other fields with different DV Roles.

You can assign the following DV Roles.

❏ **Dimension.** A dimension is a way to categorize data or sort output. You can use a dimension to analyze and compare measures. Dimension fields are generally alphanumeric fields, such as Product.

Dimension fields can be organized into hierarchies to define the relationships between them, and provide information for the Auto Drill feature. For example, a Geography hierarchy can contain the Continent, Country, State, and City fields. When Auto Drill is turned on, automatic drilldown links are created in the report or chart output.

A dimension field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, is automatically added to the request as a vertical (BY) sort field. A folder can be assigned the role Dimension. A field can be assigned the role Dimension (Standalone) or Dimension (Drill Level). When it is assigned the role Dimension (Drill Level), it becomes part of a hierarchy, where the levels depend on the order of the fields in the folder. You can also define dimension fields that are not part of a dimension hierarchy.

❏ **Measure.** A measure field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, will automatically be added to the request as an aggregated value (SUM), if it is numeric. If it is alphanumeric, it will be added as a vertical (BY) sort field. A folder or field can be assigned the role Measure.

❏ **Attribute.** An attribute is a field or collection of fields that add additional information about a dimension. An attribute field, when double-clicked or dragged onto the report or chart canvas in the WebFOCUS tools, will automatically be added to the request as an aggregated value (SUM), if it is numeric, or as a vertical sort field (BY), if it is alphanumeric.

❏ **Folder.** A folder is a virtual segment in a Business View. It can be assigned the roles Dimension, Measure, or Attribute.

Note: When a folder is inserted as a child of a field, the attribute PARENT_FIELD describes this relationship. By default, such a folder and its fields will be assumed to have the Attribute role.

Editing Metadata

Metadata is data about data, and describes the characteristics of your data sources, or synonyms. Metadata can be generated whenever data is created, acquired, added to, deleted from, or updated.

You can edit previously created synonyms in the following ways:

❏ From the WebFOCUS Home Page, click the *Data* category on the Action Bar, and then click *Metadata* 🟢 .

❏ From the Legacy Home Page, in the Resources tree, right-click a folder or domain, point to *Metadata* and then click *Edit*.

The Applications page opens, from which you can edit your synonym, or choose from other options.

Procedure: **How to Edit a Synonym**

1. From the Applications page, in the Application Directories tree, click a folder to expand it, then right-click a metadata file in the file panel and select *Open*, as shown in the following image.
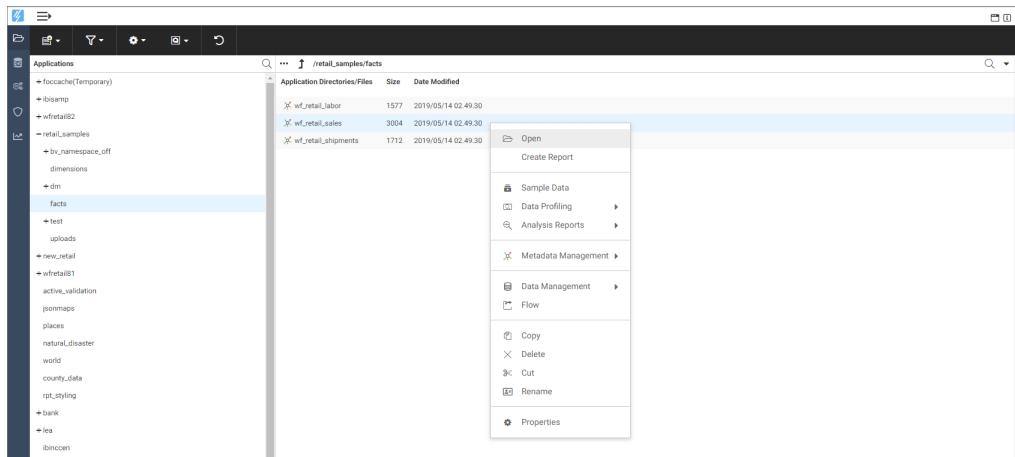
Note: To edit as text, select *Metadata Management*, and then select *Edit as Text* or *Edit Access File as Text*.

The Synonym Editor opens, where you can modify your synonym, as shown in the following image.

Note: You can open the Synonym Editor directly from the WebFOCUS Home Page by clicking the repository Master File shortcut that was created, if you previously uploaded or connected to data. You can also right-click the shortcut and select *Edit* from the shortcut menu, as shown in the following image.
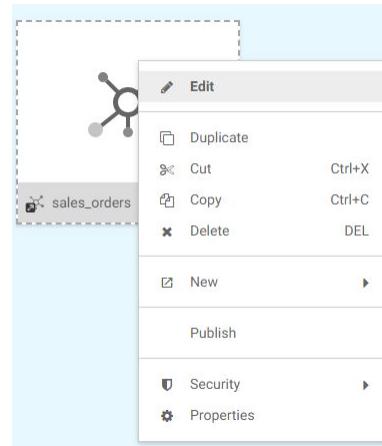
2. Make edits to the synonym, as required.

3. To save your synonym, click the *File* icon highlighted on the ribbon, and then select *Save*.

4. To close the Synonym Editor, click the *File* icon highlighted on the ribbon, and then select *Close*.

Chapter **6**

Generating Sample Content

This topic describes how to generate sample content from uploaded or existing data. It also provides information about how to interpret and analyze the sample content.

In this chapter:

❏ Generating Sample Content Overview

❏ Analyzing Sample Content

Generating Sample Content Overview

In WebFOCUS you can automatically generate a suite of analytic content based on uploaded Excel workbooks, CSV files, or existing single-segment Master Files in your repository, using the Sample Content feature. This feature populates your directory with sample charts, reports, and dashboards. Additionally, the suite contains charts and reports that provide quick and easy navigation through the levels of each available hierarchy. You can view, edit, or delete this content. You can also use this content as a starting point to create new dashboards or interact with it on your portable devices.

The Sample Content feature is useful to the novice user, because it introduces all major analytic content types in the InfoAssist toolset. Depending on the structure of your source worksheet or synonym, it automatically creates the following items:

❏ Active dashboards:

  ❏ Initial Dashboard

  ❏ Initial Dashboard by Year

  Note: This item is only generated if your source dataset includes an eligible date, which contains data for minimum three unique months.

❏ Reports:

  ❏ Auto-drill report starting at the top of each identified hierarchy

  ❏ Overview accordion report

  ❏ Overview active report

❏ Charts:

    ❏ Pie chart

    ❏ Bar chart

    ❏ Line chart

> **Note:** Line charts are only created if your source dataset includes an eligible date, which contains data for minimum three unique months.

The dashboards, auto-drill reports, overview accordion report, and overview active report are stored in the Analytics folder. All other items are placed in the folders that are named after the measures for which they are created. The content may vary depending on the structure and size of your synonym.

To see the most complete suite of analytical content, it is recommended that you use a data source that contains at least four measures, six dimensions, and data for a minimum of three unique months. Additionally, a record count called Trans appears in the sample content, if there are not sufficient measures available for analysis.

Note: Virtual fields, such as COMPUTE and DEFINE, are not eligible for selection as dimensions or measures in the generated content.

The following image shows an example of a synonym and the suite of sample content generated from this synonym and displayed in the Resources tree.

Note: If you generate sample content more than once from the same source worksheet or synonym in the same location, the Sample Content feature creates a new folder with an underscore and number appended to the title. For example, if a retail_sample folder already exists in a domain or folder, a new folder with the new set of content is created and titled retail_sample_1. The number is incremented each time you repeat this action.

You can generate sample content by navigating to the Sample Content option from the WebFOCUS Home Page or Legacy Home Page, which leverages existing data.

Procedure: **How to Generate Sample Content from the WebFOCUS Home Page**

1. On the WebFOCUS Home Page, in the Workspaces view, select a workspace in which you want to generate sample content.

2. On the Action Bar, click *Sample Content*.

    Note: You may have access to multiple tools from the Action Bar. In this case, you would first select the InfoAssist tab, before clicking Sample Content.

    The Sample Content dialog box opens.

    Note: Only single-segment Master Files and folders containing these files are displayed for selection.

3. Locate a single-segment Master File that you want to use for generating sample content and click *Open*.

    The new folder with the same name as your Master File appears in your chosen directory. It contains sample charts, reports, and dashboards.

Procedure: **How to Generate Sample Content From the Legacy Home Page**

1. On the Legacy Home Page, in the Resources tree, right-click a workspace or folder, point to *New*, and then click *Sample Content*.

    The Open dialog box opens.

    Note: Only single-segment Master Files are displayed for selection.

2. Locate a single-segment Master File that you want to use for generating sample content and click *Open*.

    The new folder with the same name as your Master File appears in your chosen directory. It contains sample charts, reports, and dashboards.

Analyzing Sample Content

The following section provides a closer look at each content type, and explains how this content is generated. These examples have been generated using the retail_data_extract.xlsx spreadsheet that is provided with your WebFOCUS installation.

Initial Dashboard by Year

The Initial Dashboard gives you a quick overview of your data. It is comprised of three charts and one report, as shown in the following image. Additionally, it displays a drop-down menu, which allows you to narrow down your results to a specific year. The Initial Dashboard by Year is only generated if your source worksheet or synonym includes an eligible date, which contains data for a minimum of three unique months.
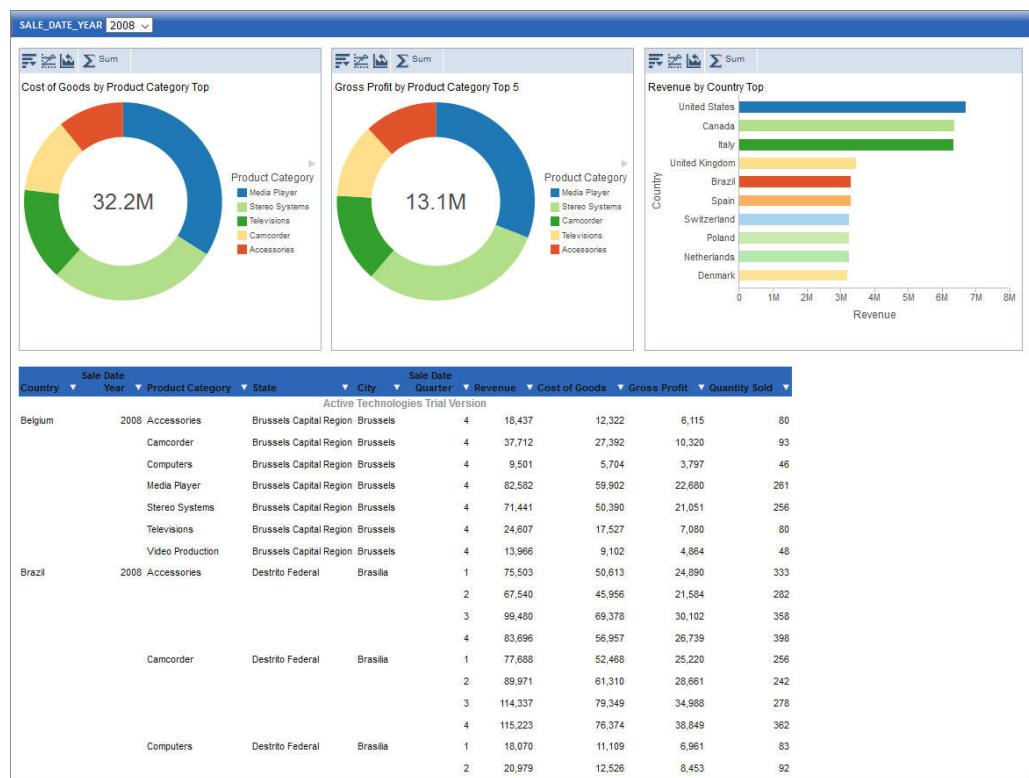
The bar chart is generated from the first measure and first dimension in the source spreadsheet or synonym. It shows the Top 10 values.

The first pie chart is generated from the second measure and second dimension. It shows the Top 5 values.

The second pie chart is generated from the third measure and third dimension. It shows the Top 5 values.

The active report shows an overview of all measures and dimensions in the source worksheet or synonym.

Initial Dashboard

The Initial Dashboard is identical to the Initial Dashboard by Year, with the exception that the year drop-down menu is not displayed.

Auto-drill reports

The auto-drill reports are generated for each of the identified hierarchies in the synonym. For example, if your data set contains three hierarchies, the Sample Content feature automatically creates three auto-drill reports and one overview auto-drill report. In each auto-drill report, the first four measures in the data set will be summed up by the dimension values in the hierarchy. The report also features data bars and grand totals for each dimension in the hierarchy. The name of the hierarchy is reflected in the title of the report. For example: Dimension_Auto_Drill_Report.fex where Dimension is the top level of the hierarchy. The following image shows an example of an Overview Auto-Drill Report.

Country	Sale Date Year	Product Category	Revenue	Cost of Goods	Gross Profit	Quantity Sold
Australia	2012	Accessories	3,967	2,653	1,314	15
		Camcorder	4,057	2,503	1,554	16
		Computers	4,315	2,917	1,398	17
		Media Player	11,656	9,053	2,603	35
		Stereo Systems	13,152	9,431	3,721	51
		Video Production	1,698	1,205	493	7
	2013	Accessories	149,408	102,379	47,029	577
		Camcorder	151,166	96,371	54,795	538
		Computers	164,166	114,529	49,637	509
		Media Player	293,022	225,836	67,186	949
		Stereo Systems	323,902	229,324	94,578	1,214
		Televisions	81,027	61,989	19,038	94
		Video Production	58,771	40,559	18,212	220

Click one of the links to drill-down to the lower level, as shown in the following image. You can use the breadcrumbs to navigate back to the original report.

Home → Australia

State	Sale Date Year	Product Category	Revenue	Cost of Goods	Gross Profit	Quantity Sold
New South Wales	2012	Accessories	3,967	2,653	1,314	15
		Camcorder	4,057	2,503	1,554	16
		Computers	4,315	2,917	1,398	17
		Media Player	11,656	9,053	2,603	35
		Stereo Systems	13,152	9,431	3,721	51
		Video Production	1,698	1,205	493	7
	2013	Accessories	149,408	102,379	47,029	577
		Camcorder	151,166	96,371	54,795	538
		Computers	164,166	114,529	49,637	509
		Media Player	293,022	225,836	67,186	949
		Stereo Systems	323,902	229,324	94,578	1,214
		Televisions	81,027	61,989	19,038	94
		Video Production	58,771	40,559	18,212	220
TOTAL			1,260,307	898,749	361,558	4,242

Overview Accordion Report

The Overview Accordion Report provides a way to control the amount of sorted data that appears on a page with the expandable views of data for each vertical sort field. It contains up to three dimensions and the first four measures that are found in your source synonym. The report displays total values for each measure. The following image shows an example of an Overview Accordion Report.

	Revenue	Cost of Goods	Gross Profit	Quantity Sold
⊟ Australia	1,260,307	898,749	361,558	4,242
⊟ 2012	38,845	27,762	11,083	141
Accessories	3,967	2,653	1,314	15
Camcorder	4,057	2,503	1,554	16
Computers	4,315	2,917	1,398	17
Media Player	11,656	9,053	2,603	35
Stereo Systems	13,152	9,431	3,721	51
Video Production	1,698	1,205	493	7
⊞ 2013	1,221,462	870,987	350,475	4,101
⊞ Belgium	20,148,423	14,449,034	5,699,389	66,721
⊞ Brazil	25,974,012	18,615,007	7,359,005	86,606
⊞ Canada	51,147,788	36,606,113	14,541,675	171,492

Overview Active Report

The Overview Active Report contains one BY field for each dimension. The report displays maximum of six dimensions and four measures. The total values are displayed for each measure. Each field features a drop-down menu, where you can access active report options. The Overview Active Report is always generated and resides in the Analytics folder. The following image shows an example of an Overview Active Report.

Country	Sale Date Year ▼	Product Category ▼	State ▼	City ▼	Sale Date Quarter ▼	Revenue ▼	Cost of Goods ▼	Gross Profit ▼	Quantity Sold ▼
				Active Technologies Trial Version					
Australia	Sort Ascending								
	Sort Descending	ssories	New South Wales	Sydney	4	3,967	2,653	1,314	15
	Filter ▶	corder	New South Wales	Sydney	4	4,057	2,503	1,554	16
	Calculate ▶								
	Chart ▶	puters	New South Wales	Sydney	4	4,315	2,917	1,398	17
	Rollup ▶	a Player	New South Wales	Sydney	4	11,656	9,053	2,603	35
	Pivot (Cross Tab) ▶	o Systems	New South Wales	Sydney	4	13,152	9,431	3,721	51
	Hide Column	Production	New South Wales	Sydney	4	1,698	1,205	493	7
	Grid Tool								
	Chart/Rollup Tool	ssories	New South Wales	Sydney	1	47,881	32,973	14,908	171
	Pivot Tool				2	30,560	21,101	9,459	113
	Show Records ▶				3	29,284	19,379	9,905	135
	Comments ▶				4	41,682	28,926	12,756	158
	Export ▶								
	Print ▶	corder	New South Wales	Sydney	1	38,320	23,789	14,531	145
	Window ▶				2	34,841	22,611	12,230	116
	Restore Original				3	33,260	20,795	12,465	129
					4	44,744	29,176	15,568	148
		Computers	New South Wales	Sydney	1	35,542	25,210	10,332	104

Pie Charts

The Sample Content feature uses the first four measures to create Pie charts, by pairing these measures with up to three different dimensions found in the source synonym. Each pie chart shows the Top 10 values. The number of pie charts may vary depending on your synonym structure. The following image shows an example of a pie chart created by the Sample Content feature.
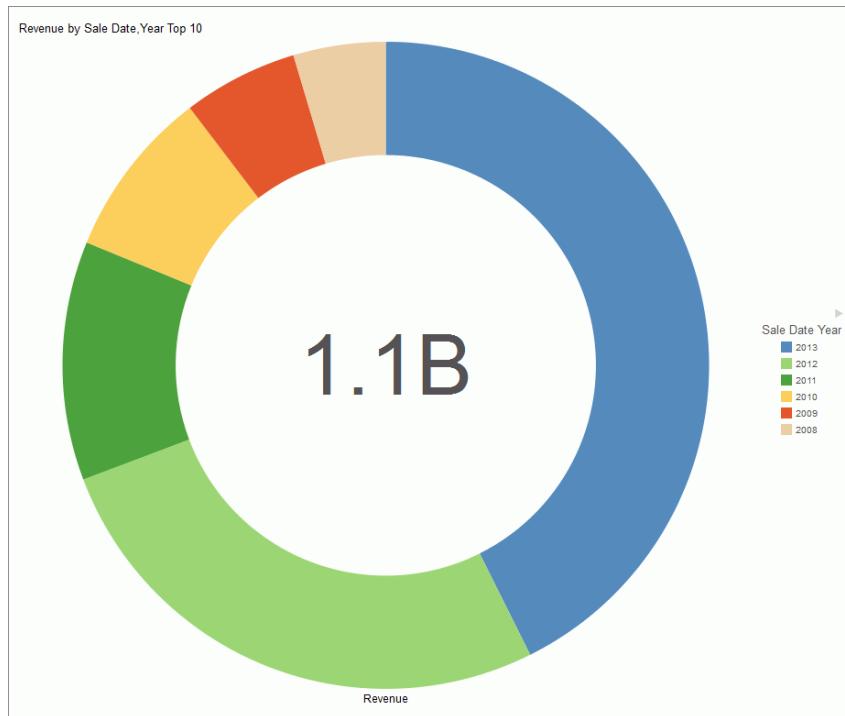
Bar Charts

The Sample Content feature creates bar charts for each measure paired with up to three different dimensions. Each bar chart shows all values in the dataset for that dimension. If there are more values than can be displayed on the screen, a scrollbar appears. The number of bar charts may vary depending on the structure of your synonym. The following image shows an example of an automatically generated bar chart.
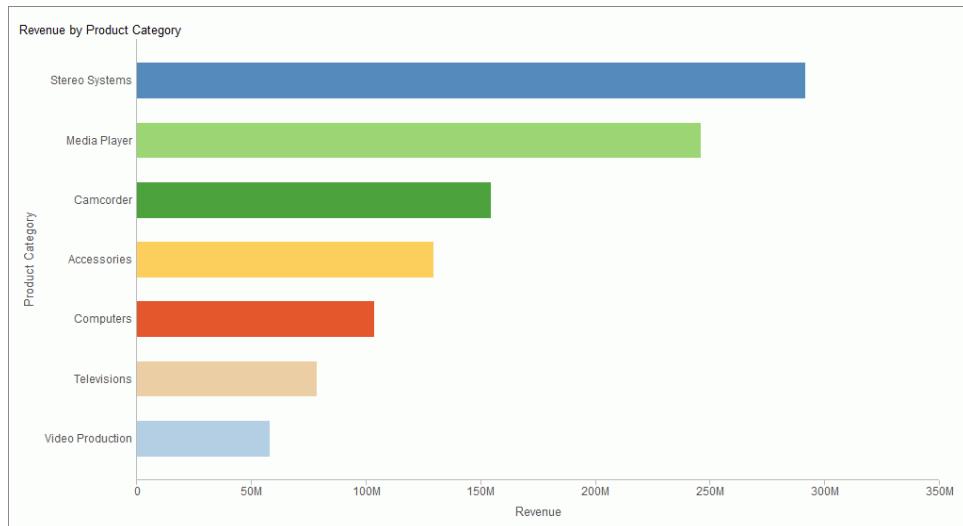
Line Charts

Line charts are only generated, if your source dataset includes an eligible date, which contains data for minimum three unique months. If this data is present in the dataset, a line chart is created for each measure. The following image shows an example of a line chart.

Chapter *7*
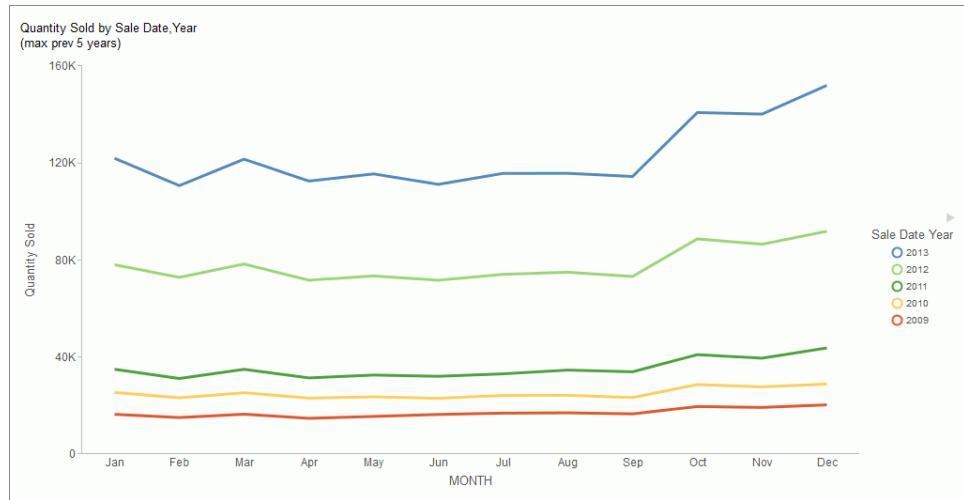
Using Web-Based Tools to Create Content

This topic describes the web-based tools that you can use with the Business Intelligence (BI) Portal. These tools help you create content items, schedule reports, view and modify the source code for procedures, and work with the Deferred Report Status Interface.

In this chapter:

❑ What Are the Web-Based Tools?

❑ InfoAssist

❑ Creating Event-based Schedules

❑ Creating Reporting Objects

❑ URL Tool

❑ Text Editor

❑ Scheduling Tools

❑ Using Deferred Reporting

What Are the Web-Based Tools?

The web-based tools are a set of applications and utilities available through the BI Portal that enable you to perform many development and deployment tasks.

For example, you can create ad hoc reports, charts, documents, and dashboards, and customize the output using InfoAssist. Using Alert Assist, a Managed Reporting developer can distribute a report that an end user created, or a portion of that report, when certain conditions are met.

InfoAssist also provides a web-based environment for analysts to quickly author interactive visualizations. Those visualizations can also be stored and shared with other analysts, who can enhance them further, or deploy directly to business users.

The Reporting Object tool enables developers to transform complex views of data into simple reporting objects labeled with common business terminology familiar to end users. End users can then use these Reporting Objects as templates to create their own reports and charts.

The URL tool enables you to create a link to a website. You can give the URL a display title and a summary that appears as a ToolTip when the mouse hovers over the URL in the Resources Tree.

The Text Editor tool enables you to create, view, and edit the source code for procedures, procedure components, Master Files and Access Files, and other types of files required by your applications.

Using the ReportCaster Basic Scheduling tool or the Advanced Scheduling tool, you can create a ReportCaster schedule. A ReportCaster schedule allows you to specify when to run a report, the format in which to create the output, and the method of distribution.

The Deferred Report Status Interface enables you to obtain information about deferred reports, and to perform a variety of actions upon the report.

For a more complete description of each tool, please see the relevant section.

InfoAssist

InfoAssist is the web-based ad hoc reporting tool in WebFOCUS.

With InfoAssist, you can quickly and easily:

❑ Generate highly complex reports, charts, dashboards, visualizations, and documents from any enterprise information source without IT intervention.

❑ Complete tasks, such as building a report, with minimal clicks.

❑ Convert reports to charts, or charts to reports, in a single click.

❑ Analyze multiple reports and charts simultaneously, using advanced tiling options to view data from multiple perspectives.

❑ Create visuals, such as charts, grids, and maps, to illustrate trends in your data.

❑ Build visualizations, comprised of one or more visuals, or text, in order to view different formats of information on a single screen.

❑ Blend and manipulate data, joining it with enterprise databases, transactions, applications, and third-party sources to deliver insightful visualizations.

❑ Discover trends, patterns, and connections hidden within data using a library of intuitive pre-built charts, maps, grids, filters, sliders, and other interactive data discovery tools.

❑ Browse more than 300 enterprise-information sources, including multi-dimensional sources.

❏ Output report and chart data in a variety of formats, including HTML, HTML5 (charts only), active reports, active Flash®, PDF, active PDF, Excel®, and PowerPoint®.

InfoAssist is a Rich Internet Application (RIA) that uses AJAX (Asynchronous JavaScript and XML) technology. It delivers its cutting-edge functionality using a familiar Microsoft Windows® ribbon interface. This highly intuitive environment shields users from the underlying technical complexities associated with ad hoc reporting features, while providing access to all the functionality needed to address mission-critical information requirements.

This powerful tool enables rapid and efficient design and deployment of reports, charts, and visualizations. It uses an interactive and fully-customizable WYSIWYG (What You See Is What You Get) development environment. Users receive instant feedback throughout the development process to ensure that reports, charts, and visualizations charts are properly built.

For full documentation on InfoAssist, see the *TIBCO WebFOCUS® InfoAssist User's Manual*.

Creating Event-based Schedules

In the business climate today, cutting costs and increasing profitability are critical. Organizations create and distribute reports for evaluating and taking action when management-defined conditions are not met. The evaluation can largely be automated using Alert reporting.

Alert reporting automates the evaluation of a defined condition to determine whether or not a report should be submitted. Recipients of the report know before they open it that they are receiving this report because there is an exception in their area of responsibility. This topic introduces and describes how you can create Alerts in WebFOCUS.

Alert Reporting

A data-driven Alert is an event that is prompted by a guideline that you define. This guideline can vary from the simple to the complex. For example, a simple guideline is to alert a sales manager when an order that exceeds $1 million is entered. An example of a more complex guideline is to alert a department manager when cumulative expenses exceed budget for any category. The report sent to the manager as a result of the Alert might show the most recent transactions, the amounts, and the sources.

Alert reporting is an integrated feature of WebFOCUS Managed Reporting and ReportCaster. An Alert report can be run interactively or by authorized users. You can use ReportCaster to schedule and distribute an Alert report. Burst capability can send targeted information to the people who need it, so that there is less information for each person to analyze.

Alerts work with all email clients. They are supported on the following mobile devices: iPhone®, iPad®, and email enabled mobile phones. Alerts can also be sent to any PC or laptop computer with email capability.

Alerts provide the following:

❏ **Alert tools.** Using Alert Assist, you can quickly set up test conditions (rules) that determine if an Alert condition should be triggered (true). This is called the Alert test. When the Alert test is triggered (true), the Alert result is run. An Alert result can be an existing report procedure or you can create the Alert result using InfoAssist.

❏ **Scheduling flexibility.** Optionally, you can schedule an Alert to run as often as every minute to evaluate the Alert test conditions.

Components of an Alert

The Alert feature requires the following components:

❏ **WebFOCUS Reporting Server.** This server is responsible for processing the procedure, accessing and retrieving the requested data, and creating the report when the Alert test is triggered (true).

❏ **Managed Reporting.** This environment is used to create and manage Alerts in the WebFOCUS repository.

An Alert consists of the following:

❏ Alert test

❏ Alert result

An Alert test is required to check whether or not a set of defined test conditions (rules) is met (true or false). An Alert test can be a *WebFOCUS Test*, which is a simple TABLE request that you create to define the condition to test for. Alternatively, an Alert test can be a *Test for File Existence*, which checks for the existence of a file that is accessible to the WebFOCUS Reporting Server to which the Alert test is submitted. The file does not need to be in the APP PATH. It just needs to be in a location where it can be found by the WebFOCUS Reporting Server.

The *Test for File Existence* file does not need to be an actual file with an extension. Testing for the existence of a folder is also valid.

If the Alert test is triggered (true), returns records, the Alert result request is processed. You have the option of creating the result report or selecting an existing report stored in the WebFOCUS repository that you are authorized to run.

Alerts Created in the Browser

When you select a new Alert from the Legacy Home Page or WebFOCUS Home Page, the WebFOCUS Alert Assist tool opens for the creation of components. Alert Assist is a Bindows™ application that is launched in a separate browser window.

When you select a new Alert from the WebFOCUS Hub or WebFOCUS Home Page, the WebFOCUS Alert Assist tool opens for the creation of components. Alert Assist is a Bindows™ application that is launched in a separate browser window.

The browser tab uses the generic name Alert*n*, where *n* is an index number starting at 1. All subsequent Alerts increase by 1. If you save the Alert, the dialog box is automatically set up with this generic name. However, you can change the name as desired.

If you select *WebFOCUS Test* in the browser, you are prompted to create the Alert test using InfoAssist. The version of InfoAssist that is invoked does not have field styling, heading, footing, or report options, such as OLAP and On-Demand Paging. The Alert test determines whether or not a specified condition is true. It is not the report that is displayed as the result of the Alert.

You can create the Alert result using InfoAssist, this time with all the available styling and report options. Alternatively, you can select an existing report stored in the WebFOCUS repository that you are authorized to run.

Note: It is recommended that you select an existing report for the Alert result request, as it is available to edit, run interactively, or schedule independently of the Alert. If you create the Alert result using InfoAssist within Alert Assist, you need to use Alert Assist and select the open option again to edit the request, because the Alert test and the report to be run are contained within the Alert procedure.

Reference: **Alert Assist Sample Code Created With InfoAssist**

In the sample code that follows, both the Alert test and the report to be run (Alert result) are created with InfoAssist. To keep the sample code simple, styling and report options, such as report headings and conditional styling, are not included in this request.

Notice that after the first TABLE request, there is a –IF statement that checks if the number of lines in the Alert test is equal to zero (-IF &LINES EQ 0). This test condition determines if the second TABLE request, to execute the report, should be triggered (true).

If the number of lines is greater than zero, then there are records that satisfy the Alert test, and the report is run. If the number of lines is equal to zero, then there are no records that satisfy the Alert test, and the report is not run.

```
-* Created by Alert Assist
-* start of the test report
ENGINE INT CACHE SET ON
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE ibisamp/wf_retail
SUM WF_RETAIL.WF_RETAIL_SALES.COGS_US
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US
BY WF_RETAIL.WF_RETAIL_PRODUCT.PRODUCT_CATEGORY
BY WF_RETAIL.WF_RETAIL_PRODUCT.BRAND
WHERE WF_RETAIL.WF_RETAIL_SALES.COGS_US GT
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US;
ON TABLE HOLD
ON TABLE NOTOTAL
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET CACHELINES 100
END
-* end of the test report
```

```
-* start of the test
-RUN
-IF &LINES EQ 0 GOTO ALERTEXIT;
-* end of the test
-* start of the output report
ENGINE INT CACHE SET ON
-*COMPONENT=Define_wf_retail
DEFINE FILE ibisamp/wf_retail
Loss/D12.2=WF_RETAIL.WF_RETAIL_SALES.REVENUE_US -
WF_RETAIL.WF_RETAIL_SALES.COGS_US ;
END
-DEFAULTH &WF_SUMMARY='Summary';
-DEFAULTH &WF_TITLE='WebFOCUS Report';
TABLE FILE ibisamp/wf_retail
SUM WF_RETAIL.WF_RETAIL_SALES.QUANTITY_SOLD
Loss
BY WF_RETAIL.WF_RETAIL_PRODUCT.BRAND
ACROSS WF_RETAIL.WF_RETAIL_TIME_SALES.TIME_QTR
WHERE WF_RETAIL.WF_RETAIL_SALES.COGS_US GT
WF_RETAIL.WF_RETAIL_SALES.REVENUE_US;
ON TABLE SUBHEAD
"Brand Revenue Loss"
ON TABLE PCHOLD FORMAT HTML
ON TABLE NOTOTAL
ON TABLE SET CACHELINES 100
ON TABLE SET PAGE-NUM NOLEAD
ON TABLE SET SQUEEZE ON
ON TABLE SET HTMLCSS ON
ON TABLE SET HTMLENCODE ON
ON TABLE SET EMPTYREPORT ON
ON TABLE SET GRWIDTH 1
ON TABLE SET STYLE *
INCLUDE=IBFS:/FILE/IBI_HTML_DIR/javaassist/intl/EN/ENIADefault_combine.sty,$
TYPE=REPORT, TITLETEXT=&WF_TITLE.QUOTEDSTRING,
SUMMARY=&WF_SUMMARY.QUOTEDSTRING, HFREEZE=OFF, $
TYPE=TABHEADING, LINE=1, JUSTIFY=CENTER, $
TYPE=TABHEADING, LINE=1, ITEM=1, OBJECT=TEXT, SIZE=14, STYLE=BOLD+ITALIC, $
ENDSTYLE
END
-* end of the output report

-* start of the options
-* end of the options
-ALERTEXIT
-* Finished by Alert Assist
```

Procedure: **How to Launch WebFOCUS Alert Assist**

1. Sign in to WebFOCUS as an administrator or developer.

2. If you are working with the Hub or the WebFOCUS Home Page, launch WebFOCUS Alert Assist in one of the following ways:

   ❏ From the WebFOCUS Hub, select the Workspaces area. Select the workspace in which you want to create the alert, and in the +Content menu, point to *Other*, and click *Alert*.

   ❏ From the WebFOCUS Home Page, select the Workspaces area. Select the workspace in which you want to create the alert. If the +Content menu is visible, point to *Other*, and

   click *Alert*. If the Action bar is visible, click *Alert* .

   ❏ From the Legacy Home Page, in the Resources tree, right-click the workspace or folder where you want the alert to reside, point to *New*, and then click *Alert*.

   WebFOCUS Alert Assist opens.

3. If you are working with the Legacy Home page, launch WebFOCUS Alert Assist by performing the following steps:

   ❏ In the Resources tree, right-click the workspace or folder where you want the alert to reside, point to *New*, and then click *Alert*.

   The Tool Setup dialog box opens. It provides options for selecting a WebFOCUS Reporting Server and Application Paths.

   Note: User access to the Tool Setup dialog box to specify WebFOCUS Reporting Server properties is controlled by a WebFOCUS security privilege. For information on WebFOCUS security privileges, see the *TIBCO WebFOCUS® Security and Administration* manual.

❑ Select a WebFOCUS Reporting Server and Application Paths when not using the default WebFOCUS Reporting Server specified in the TIBCO WebFOCUS® Client configuration or the default application path for that WebFOCUS Reporting Server, as shown in the following image.
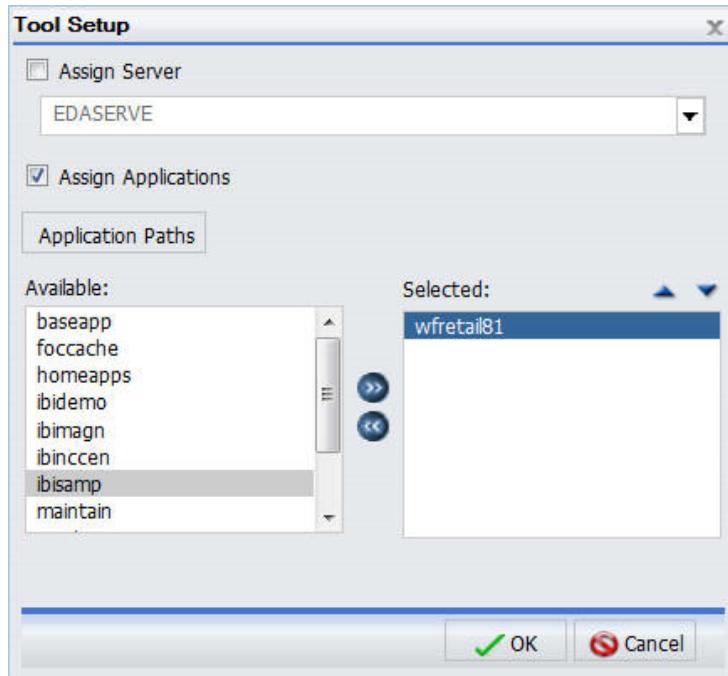

Note: The Tool Setup dialog box is only available on the Legacy Home Page. On the WebFOCUS Home Page, you must set a WebFOCUS Reporting Server and Application Paths on the folder level in the Properties prior to creating content.

❑ Click *OK*.

WebFOCUS Alert Assist opens.

Alert Assist Overview

When you create an Alert in the web browser, it invokes Alert Assist and then InfoAssist. Alert Assist has a user interface similar to InfoAssist. The following image shows the WebFOCUS Alert Assist interface.
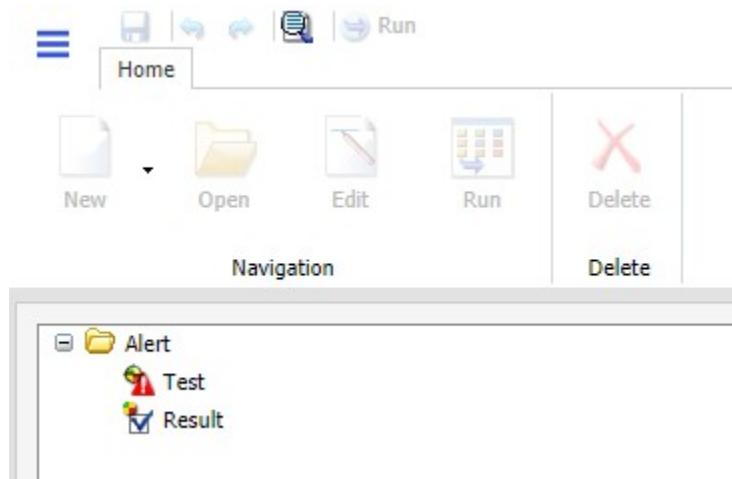
Alert Assist Main Menu

In the upper-left corner of the browser window is the Main menu button, which provides access to the Alert Assist Main Menu. This menu contains the Save, Save As, Run, Close, and Exit options. Some of these options are also on the Alert Assist Quick Access toolbar.

The following image shows the expanded Alert Assist Main Menu.
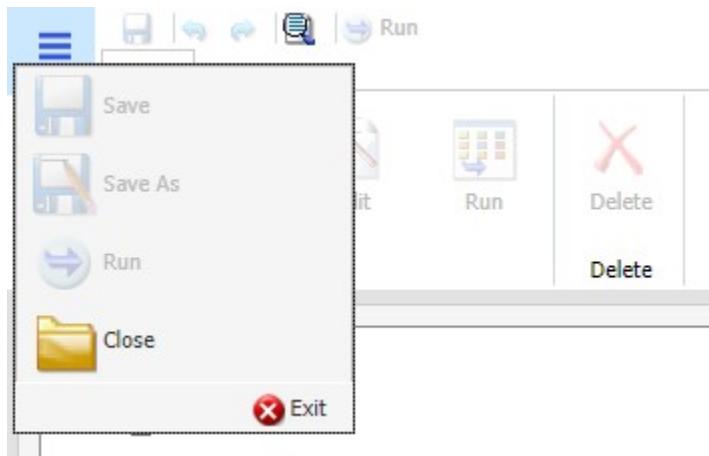
Save

Saves the Alert. This option is disabled until both parts of the Alert are created.

Save As

Saves the current Alert with a new name. The Save As dialog box displays a field where you can type the new name. This option is disabled until both parts of the Alert are created.

Run

Submits the Alert procedure to the WebFOCUS Reporting Server. This option is active when both parts of the Alert have been created. The output always opens in a new browser.

Close

Closes the current Alert and prompts you to save any changes.

Exit

Exits the Alert Assist and prompts you to save any pending changes to the open Alert.

Alert Assist Quick Launch Toolbar

The Alert Assist Quick Launch toolbar contains the following buttons.

Button	Description
	Saves the Alert. This option is disabled until both parts of the Alert are created.
	Reverts back by undoing one action.
	Moves forward by redoing one action.
	Displays the Alert procedure code in a read-only window.
Run	Submits the entire Alert procedure to the WebFOCUS Reporting Server. This option is active when both parts of the Alert have been created. The output always opens in a new browser.

Ribbon

Under the Alert Assist Quick Access toolbar is a ribbon. When Alert Assist first opens, none of the ribbon options are activated.

You must select the Test node or Result node to activate the New option, as shown in the following image.
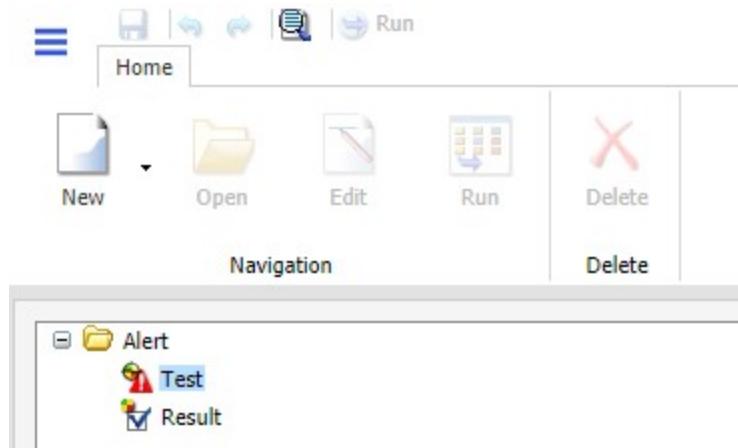
You must create a Test to activate the remaining options, as shown in the following image.
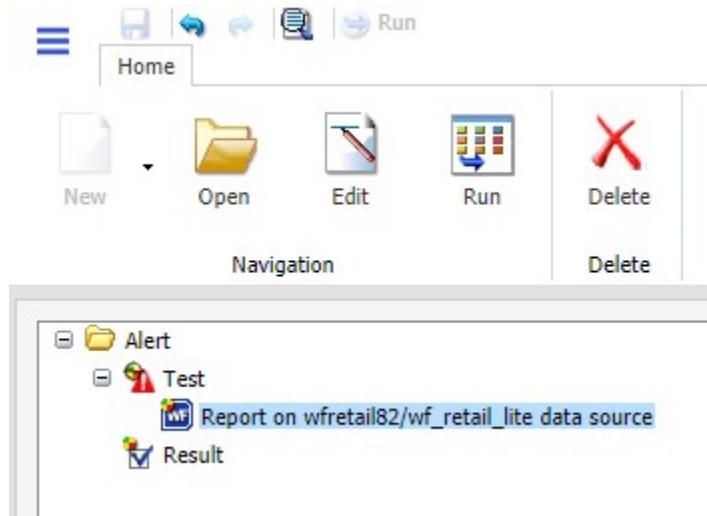
The ribbon contains the following options:

Navigation Group

New

> Displays a menu from which you can choose to create a new WebFOCUS report or WebFOCUS test, open an existing report, or test for file existence. This button is active when the Test node or Result node is selected. You can also find these options in the shortcut menus for the Test node and Result node.

Open

> Invokes InfoAssist so that you can make changes to the report when an Alert test or Alert result is selected. The Open option is only activated after a report test is created.

Edit

> Opens the report on FILENAME data source dialog box when an Alert test or Alert result is selected. You can then edit the report in a text editor.

Run

> Runs the report in a new browser window when an Alert test or Alert result is selected.

Delete Group

Delete

> Removes the report from the Test or Result node.

The Life of an Alert

Authorized users can run an Alert test interactively and optionally schedule it to be distributed by ReportCaster.

The following image shows basic Alert processing.
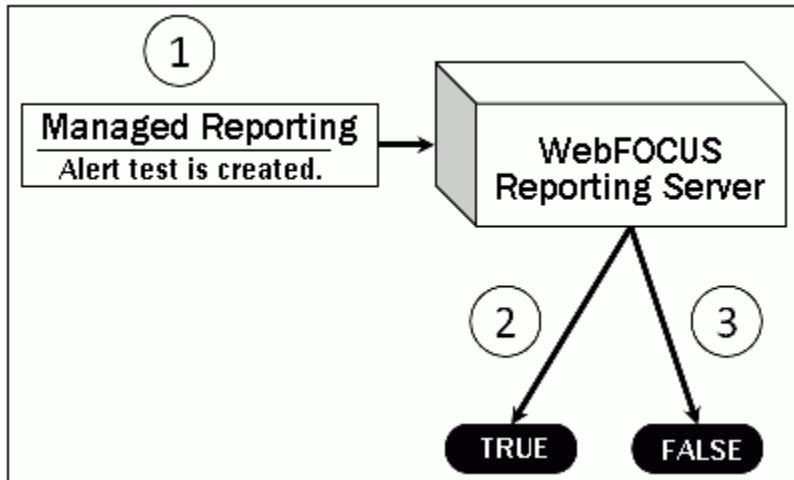
1. The developer, using Alert Assist or the Alert Wizard, creates an Alert test and designs the report that is run if the Alert condition is true.

2. If the Alert test is true, the WebFOCUS Reporting Server runs the Alert result.

3. If the Alert test is false, the Alert result is not run.

The following image shows scheduled Alert processing.
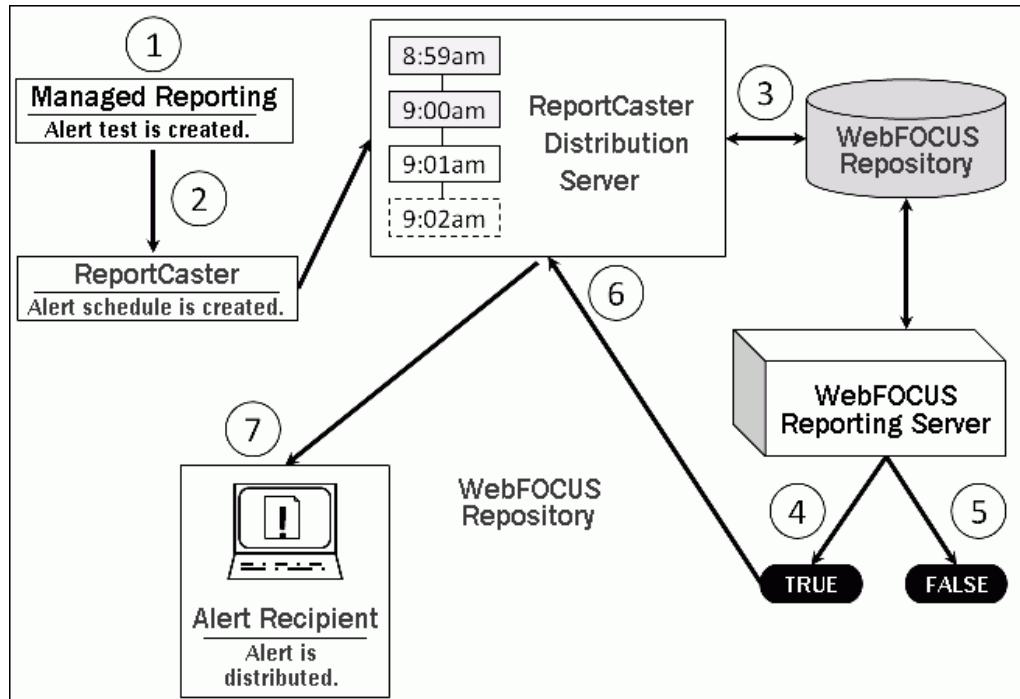
1. The developer, using Alert Assist or the Alert Wizard, creates an Alert test and designs the report that is run if the Alert condition is true.

2. If desired, an Alert schedule is created using ReportCaster.

3. The ReportCaster Distribution Server checks for scheduled jobs in the WebFOCUS Repository.

4. When the ReportCaster Distribution Server processes a scheduled Alert procedure, it is submitted to the WebFOCUS Reporting Server to evaluate if the Alert test is true.

   a. If the Alert test is false, the Alert is returned to the queue for the next scheduled time.

   b. If the Alert test is true, the WebFOCUS Reporting Server runs the Alert result and returns the results to the ReportCaster Distribution Server. The ReportCaster Distribution Server distributes the Alert result to the recipients, as specified in the schedule.

Creating and Scheduling an Alert

The following procedures describe how to create an Alert test, and Alert result using Alert Assist, and how to schedule an Alert with ReportCaster.

Procedure: **How to Create an Alert Test**

1. In the Alert Assist main window, right-click the *Test* node, and then point to *New*, as shown in the following image.
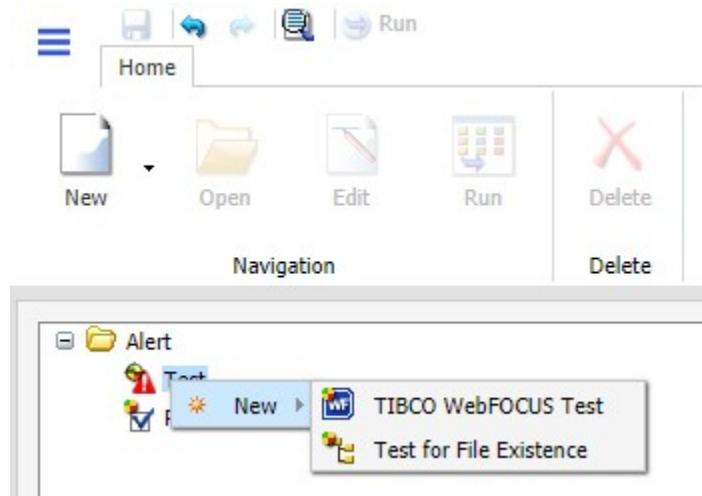
2. Select one of the following options:

   ❏ **WebFOCUS Test.** Allows you to create a new report in a scaled-down version of InfoAssist. Proceed to step 3.

   ❏ **Test for File Existence.** Allows you to select an existing report. Proceed to step 6.

   Note: The scaled-down version of InfoAssist is used to create basic TABLE requests with HOLD (not PCHOLD FORMAT) statements. It generates procedure syntax that is written to the Alert the same way as in earlier WebFOCUS releases. The Edit option on the ribbon allows you to open the editor and manually enter the procedure code or edit existing procedure code. When the test is saved from the editor, the syntax needs to be validated as having an ON TABLE HOLD statement, a prerequisite for an Alert test.

3. When you select *WebFOCUS Test*, InfoAssist opens. Select a Master File from the Open dialog box.

4. Create your report as desired, and then save it.

5. Close InfoAssist to return to Alert Assist.

6. When you select *Test for File Existence*, type the full path to the file accessible to the WebFOCUS Reporting Server that you want to check exists. Do not use a file name or folder path that includes spaces.

Testing a folder for existence is also valid. Type the full path to the folder accessible to the WebFOCUS Reporting Server. If the file is located, the Alert is triggered (true) and the Alert result report is run.

7. Click *OK* to save the Alert test.

Procedure: **How to Create an Alert Result**

1. In the Alert Assist main window, right-click the *Result* node and point to *New*, as shown in the following image.
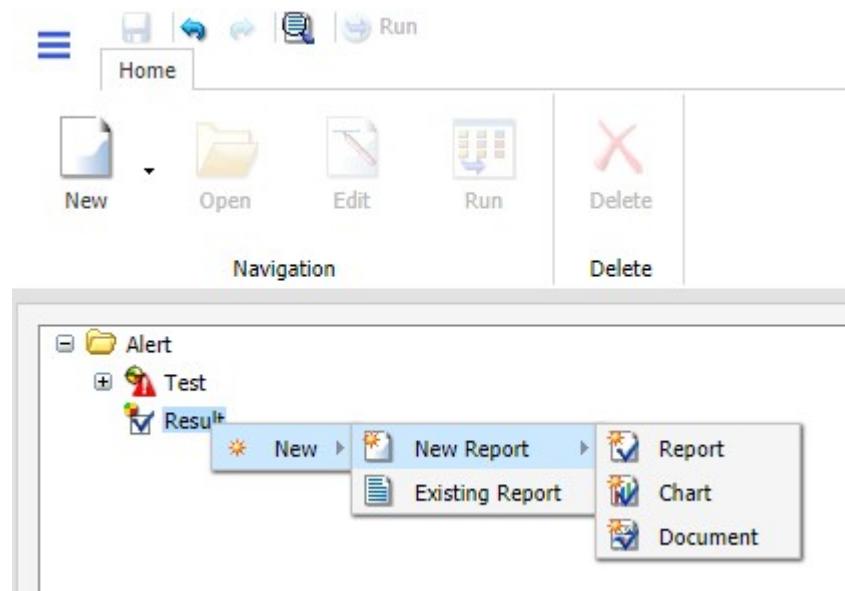
2. Select one of the following options:

❑ **New Report.** Allows you to create a new report, chart, document, or dashboard, using the full version of InfoAssist. Proceed to step 3.

❑ **Existing Report.** Allows you to choose from the existing reports in the tree. Proceed to step 5.

3. If you select *New Report*, the Open dialog box opens. Select a Master File.

InfoAssist opens, and you can create the report that will be run when the Alert test is triggered (true).

4. Save your report, and close the InfoAssist window to return to Alert Assist. Proceed to step 9.

5. If you select *Existing Report*, the Open dialog box opens. Select a report you are authorized to run from the tree.

6. Click *Open*.

   The Open dialog box closes and the selected report appears under the Result node.

7. Select *Save* from the Alert Assist menu. The Save As dialog box opens.

8. Type the Alert Title, and click *OK*.

9. Close Alert Assist.

   The Alert result is automatically run if the Alert test report is triggered (true). If you are authorized to schedule reports for distribution, you can optionally schedule the Alert.

   Note: As you use Alert Assist to create reports, you may see messages that state Report Saved. Your changes to the report have been saved, but they are not written to the WebFOCUS Repository until the Alert is saved. If you exit Alert Assist before you click *Save* in the Alert Assist menu, the Alert is not saved.

Procedure: How to Schedule an Alert

1. Access the scheduling tool in one of the following ways:

   ❑ From the WebFOCUS Hub, select the Workspaces area. Right-click the alert that you created, point to *Schedule*, and select a distribution method.

   ❑ From the WebFOCUS Home page, right-click the alert, point to *Schedule*, and click the distribution method for your alert schedule. You can also click the Schedule category in the Action Bar, and then click *Schedule* .

   ❑ From the Legacy Home Page, in the Resources tree, click the domain or folder where the Alert resides. In the WebFOCUS Explorer, click the Alert and then click *Schedule*. Select how the Alert report will be distributed when the Alert test is triggered (true).

The ReportCaster Basic Scheduling tool opens in a new browser window, as shown in the following image.
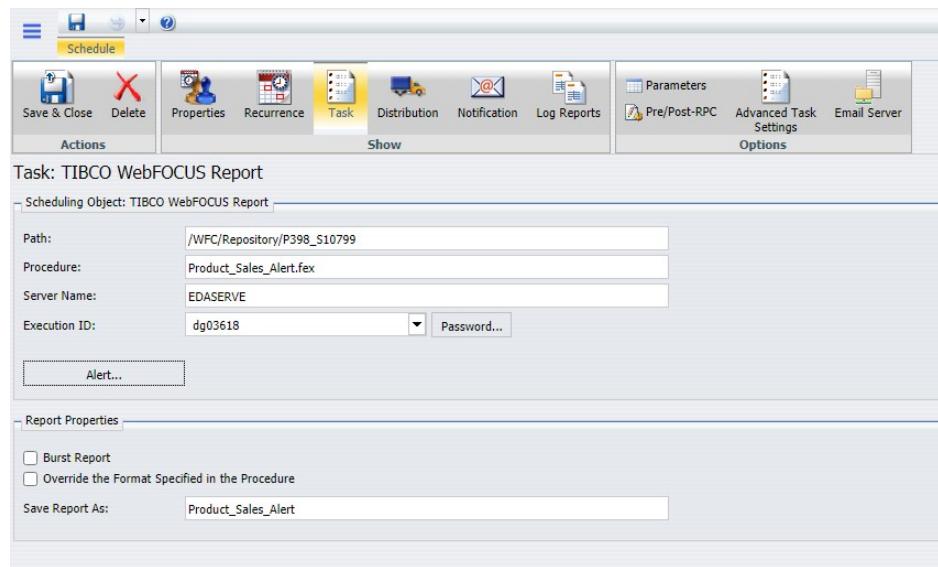
For more information on the Basic Scheduling tool and distribution options, see the *TIBCO WebFOCUS® ReportCaster Guide*.

2. Click *Alert*.

The Alert Options dialog box opens, as shown in the following image.
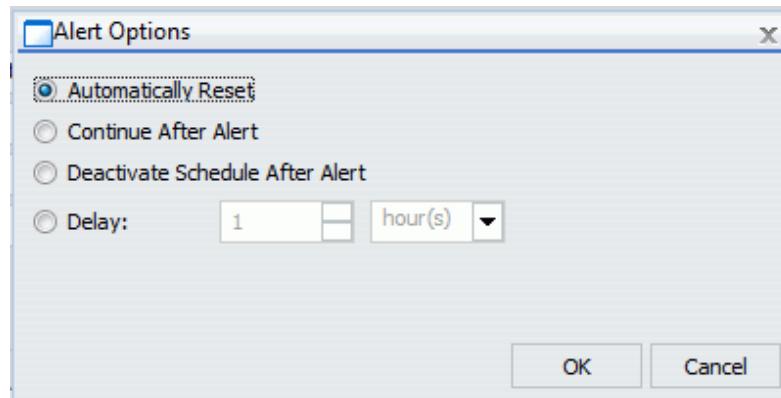
3. Select one of the following Alert Options:

   ❏ **Automatically Reset.** This option continues to run the schedule at the specified time and checks to confirm that the Alert test is no longer true before the Alert test is evaluated again. It is best to use this option when you do not want to receive the Alert result again until after the exception condition has been addressed and occurs again. For example, when the quantity in inventory is greater than 20,000, the Alert is triggered. You do not want to receive the report again until after the inventory is less than or equal to 20,000 for all products and then goes back over 20,000 again.

   ❏ **Continue After Alert.** This option continues to run the schedule at the specified time and distribute the report each time that the Alert test is true. It is best to use this option when you want to be notified at the interval specified in the schedule that the Alert test is true.

   ❏ **Deactivate Schedule After Alert.** This option deactivates the schedule after the Alert is triggered. The schedule has to be activated again for the Alert test to run after the Alert is triggered. It is best to use this option for one-time Alert tests. This is the default value.

   ❏ **Delay.** This option is best used when you want to allow a specific period of time to address the Alert test but want to be notified again if the Alert test has not been met. You can restart the Alert after a maximum of 99 hours, days, weeks, months, or years. For more information, see the *TIBCO WebFOCUS® ReportCaster Guide* technical content.

   As you complete the creation of the schedule, remember to consider the burst option to distribute specific report values, instead of the entire report. When a report is burst, the distribution information must be provided in a distribution list, distribution file, or dynamic list for email distribution and an access list for library distribution. The email and library distribution options are the most effective for Alert reports because of the push versus pull notification through email. For more information on using the burst option in ReportCaster, see the *TIBCO WebFOCUS® ReportCaster Guide*.

4. Select the *Properties* tab and type a title and summary for the scheduled report.

5. Click *Recurrence* and specify when and how often to run the schedule.

   For more information on Recurrence options, see the *TIBCO WebFOCUS® ReportCaster Guide*.

6. Click *Distribution* and specify the destination information for where you want the report to be distributed. For more information on specifying schedule distribution information, see the *TIBCO WebFOCUS® ReportCaster Guide*.

7. If you wish to receive notifications of the Alert distribution, click *Notification* and specify the destination information for where you want the notification to be sent.

8. If your Alert uses parameters, check *Parameters* to review and specify parameter values. Ensure that you have the correct Path, Procedure, and Server Name. For more information on specifying parameter values when scheduling a report procedure (FEX), see the *TIBCO WebFOCUS® ReportCaster Guide*.

9. Click *Save* and close the ReportCaster Basic Scheduling tool.

    The schedule report now appears in the repository, and you can access it from the Hub or Home Page.

Checking Scheduled Alerts

When an Alert test is false (and therefore not activated), the Alert result report is not run. When an Alert schedule runs, information about the Alert test evaluation (true or false) and any error or warning messages that occur during schedule or Alert processing are written to the log file.

In order to track the completion of a scheduled Alert, or errors that occurred during processing without checking the log report for the Alert schedule, we recommend that you use the Schedule Notification option.

In the Scheduling tool, the Notification tab allows you to specify:

❑ The terms for supplying notification (Never, which is the default value, Always, or On Error).

❑ The level of detail in the notification (full notification or brief notification).

❑ The email addresses to distribute the notification information to.

Using Sample Data to Create and Schedule an Alert

A data-driven Alert is an event that is prompted by a guideline that you define. This guideline can vary from the simple to the complex. The following tutorial describes how to create a simple Alert that is triggered when the cost of goods exceeds the revenue for a brand. This type of Alert could help a company decide whether they should continue to carry a specific brand, based on the money loss throughout a given timeframe.

To follow this tutorial, you must have access to the WebFOCUS Retail sample data source.

Example: Creating and Scheduling an Alert

1. Sign in to WebFOCUS as an administrator or developer.

2. Launch WebFOCUS Alert Assist in one of the following ways:

   a. From the WebFOCUS Hub or the WebFOCUS Home Page, open the *Workspaces* area and right-click the folder where you want the alert to reside. On the Action Bar, select *InfoAssist* and *Alert* to open the Alert Assist tool.

      Note: If the folder is not configured to connect to the sample data, by default, open the Properties panel and select the *Server* tab. Select the server where the sample data is loaded, assign the Application where the sample data resides and save your changes.

   b. From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want the alert to reside, point to *New*, and then click *Alert* to open the Tool Setup dialog box.

      Note: User access to the Tool Setup dialog box to specify WebFOCUS Reporting Server properties is controlled by a WebFOCUS security privilege. For more information, see the *TIBCO WebFOCUS® Security and Administration* manual.

      In the Tool Setup dialog box, select the server where the sample data is loaded, and assign the Application where the sample data resides, and click *OK*.

   The Alert Assist tool opens in a new browser window, as shown in the following image.
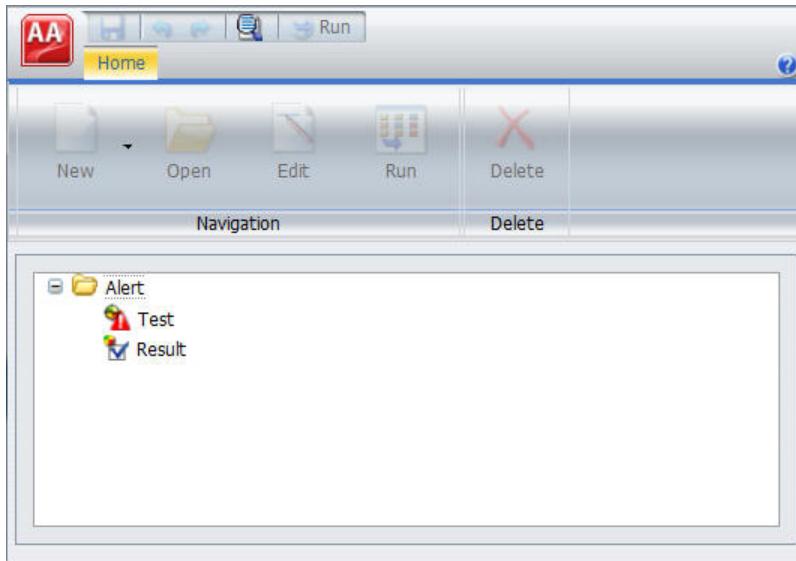
3. Click the *Test* node.

4. On the *Home* tab, in the *Navigation* group, click *New*, and then click *WebFOCUS Test*.

   WebFOCUS InfoAssist opens.

5. From the Open dialog box, choose the wf_retail Master file.

6. Add the following fields to your report:

  ❏ Product Category

  ❏ Brand

  ❏ Cost of Goods

  ❏ Revenue

  Before you complete your report, you must add the Where condition that defines the criteria that you want to be met.

7. On the *Data* tab, in the *Filter* group, click *Filter*.

  The Create a filtering condition dialog box opens.

8. Double-click the *Double-click or press F2 to edit!* text.

  The drop-down menus for Fields and Subqueries, Operators, and Values open.

9. Make the following selections:

  ❏ In the Field drop-down menu, click *Cost of Goods*.

  ❏ In the Operators drop-down menu, click *Greater than*.

  ❏ In the Value drop-down menu, click *Field*, and then select *Revenue*.

  The following image shows the finished Where condition.
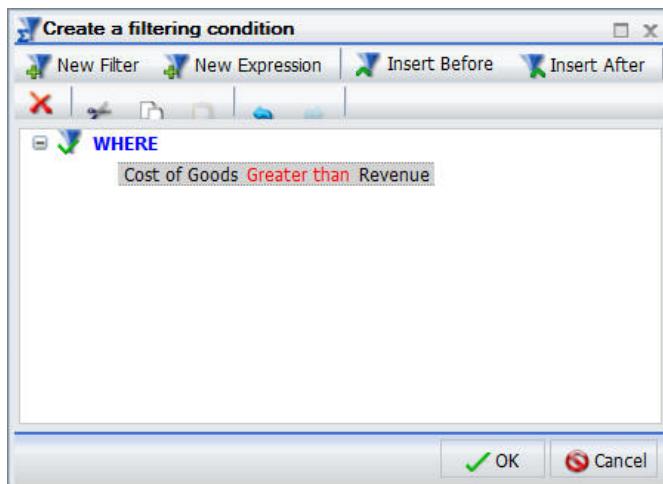
10. Click *OK*.

11. Save your report and close InfoAssist.

    Your report now shows under the Test node in the Alert Assist browser window.

12. Click the *Result* node. On the *Home* tab, in the *Navigation* group, point to *New*, click *New Report*, and then click *Report*.

    WebFOCUS InfoAssist opens.

    Since your Alert Test is checking for revenue loss, in this tutorial you want the final report to have a field that highlights the loss. This field is not available by default. You can create it.

13. From the Open dialog box, choose the wf_retail Master file.

14. On the *Data* tab, in the *Calculation* group, click *Detail*.

    The Detail Field (Define) dialog box opens.

15. In the Field input box, type *Loss*.

16. In the expressions field, create the following expression, as shown in the image below:

    WF_RETAIL.WF_RETAIL_SALES.REVENUE_US -
    WF_RETAIL.WF_RETAIL_SALES.COGS_US
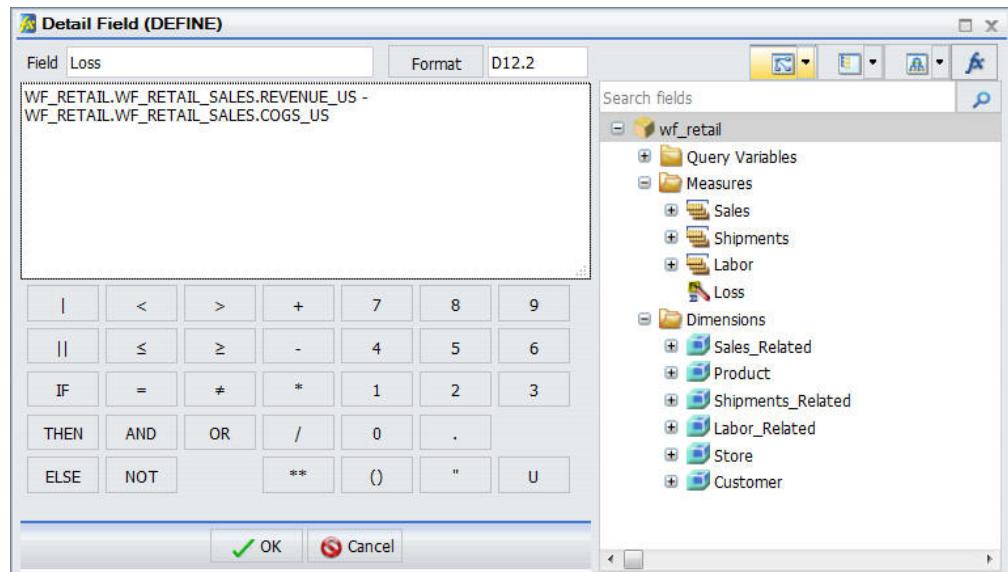
You can type the expression directly into the expression field or choose the fields from the data tree.

17. Click *OK*.

    The Data pane refreshes and now displays the new field, Loss.

18. Add the following fields to your report:

    ❏ Brand

    ❏ Quantity,Sold

    ❏ Loss

    ❏ Sale,Quarter

    To ensure that the Alert Result generates the correct report when the test criteria is met, you must add the same Where condition as the one you added to the Alert Test.

19. Repeat steps 8-11 to add the Where condition.

    You can style the report that gets distributed by adding a header.

20. On the *Home* tab, in the *Report* group, click *Header & Footer*, and then click *Report Header*.

    The Header & Footer dialog box opens.

21. Type *Brand Revenue Loss 2015*.

22. Click *OK*, and close the Header & Footer window.

23. Save your report, and close InfoAssist.

    Once both Test and Result are completed, you can save the Alert procedure.

24. In the Alert Assist browser window, click the *Save* button.

    The Save As dialog box opens.

25. In the Title field, type *Brand Revenue Loss Alerts*, and then click *Save*.

    Your new Alert now displays in the Resources tree and can be scheduled.

    You can schedule the report to be distributed through email, FTP server, report library, repository, or sent directly to a printer. In this tutorial, you want a monthly email to be sent.

26. From the WebFOCUS Home Page or Legacy Home Page, right-click the Alert that you created, point to *Schedule*, and then click *Email*.

The ReportCaster Basic Scheduling tool opens, as shown in the following image.
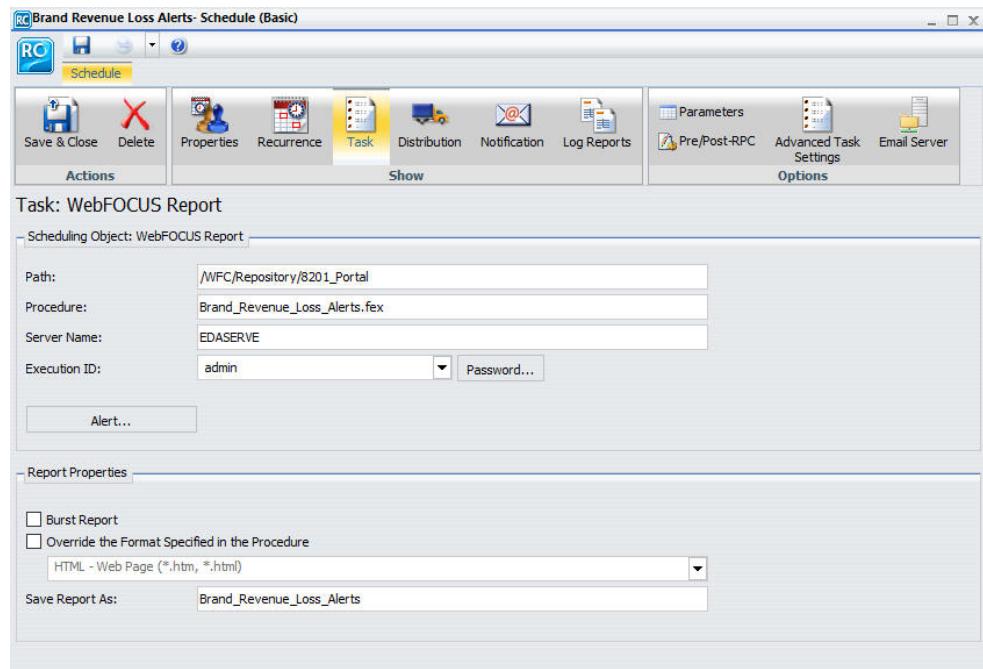
27. Under the Scheduling Object area, click *Alert*.

    The Alert Options dialog box opens.

28. Click *Continue After Alert* and then click *OK*.

    This means that the schedule continues to run at the specified time and distribute the report each time that the Alert test is true. Other options include Automatically Reset, Deactivate Schedule After Alert, and Delay. For more information about these options, see the *TIBCO WebFOCUS® ReportCaster Guide*.

29. Click *Properties*.

30. In the Summary area, type *This Alert procedure monitors the revenue loss by brand*.

31. Click *Reoccurrence*. In this example, you want to schedule the Alert procedure to run monthly on the last day of every month, as shown in the following image.
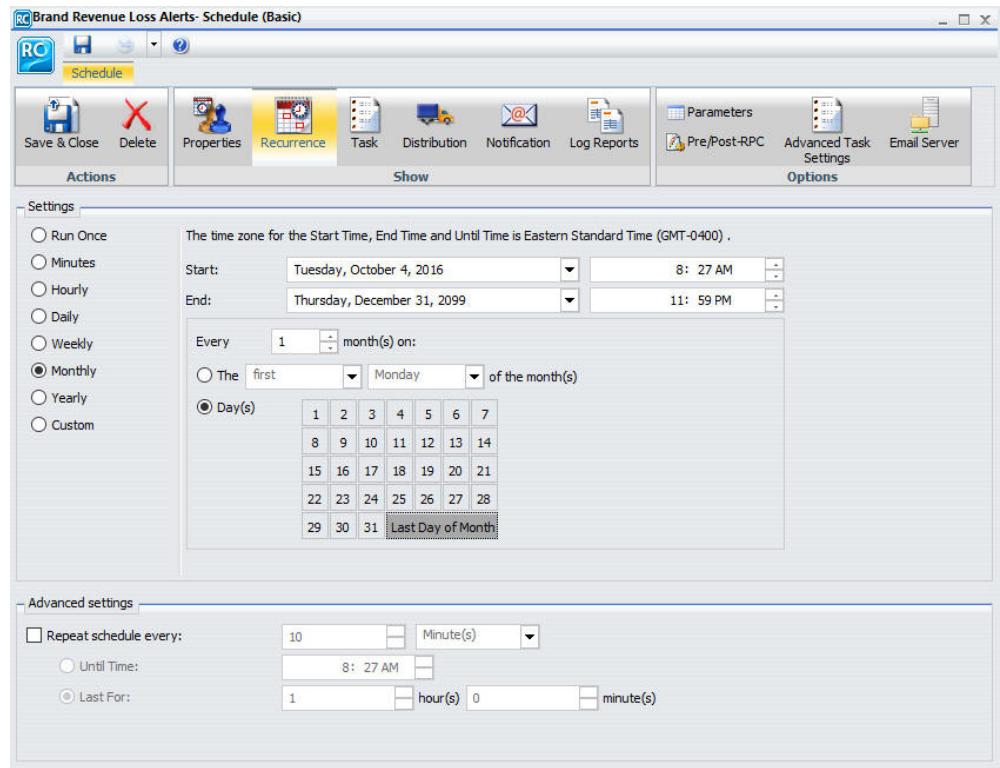
32. Click *Distribution*.

33. Complete the To, From, and Reply Address fields with the email addresses. In this tutorial, you can use your own email address to test the Alert. In the Subject field, type *Brand Revenue Loss Alerts*.

The following image shows an example of the Distribution tab.
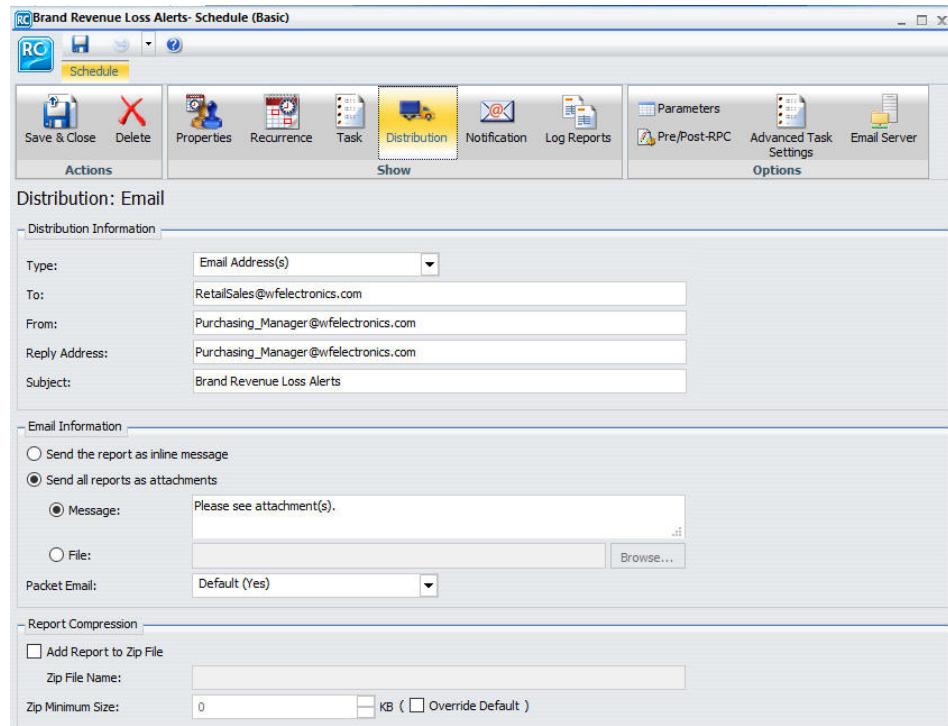
Additionally, you can set notifications of the Alert distribution. Click *Notification* and fill in the fields, as required.

34. Click *Save*.

    The Save As dialog box opens.

35. In the Title field, type *Brand Revenue Loss Alert Schedule* and click *OK*.

    The Alert Schedule now displays in the Resources tree.

36. Close the ReportCaster Basic Scheduling Tool.

37. To test the Alert, before it is scheduled to run, right-click the Alert Schedule, and then click *Run*.

    A prompt will ask you if you want to run the schedule.

38. Click *OK*.

    The email addresses that you identified earlier will receive the Alert Report, shortly.

The following images show examples of the Alert email and Alert report.

Creating Reporting Objects

With WebFOCUS Managed Reporting, a developer can easily transform complex views of data into simple objects labeled with common business terminology that every user can understand, such as Weekly Sales or Revenue. Developers create Reporting Objects that present available data using terms and formats meaningful to users. Users can then use Reporting Objects as templates for the creation of a wide range of reports and charts.

This topic describes Reporting Objects and how you can use them in WebFOCUS.

Reporting Object Tool

Reporting Objects are stored in folders in the tree within domain folders under the Content folder. They can include selection criteria (WHEREs), JOINs, virtual fields (DEFINEs), filters, and other WebFOCUS statements, as well as reports or charts supplied as templates.
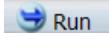
Note: A Reporting Object will not show in the repository when the user cannot functionally use the Reporting Object.

The browser Reporting Object tool allows you to create, edit, test, run, or delete a Reporting Object or its components. The main interface, as shown in the following image, consists of a static Quick Launch toolbar, a ribbon of context-sensitive options, and a window that displays the components of the Reporting Object with which you are working.
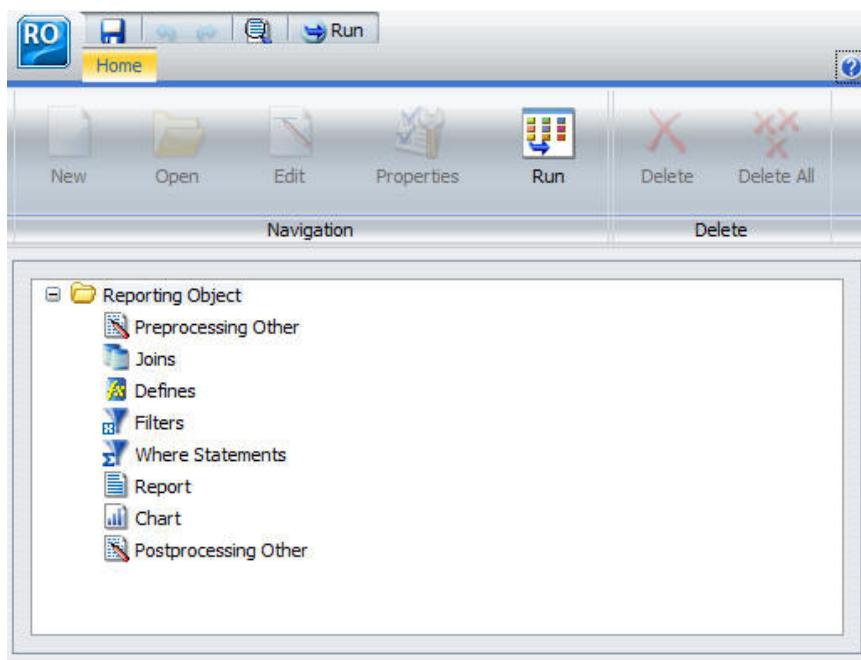
Reference: **Reporting Object Tool Quick Launch Toolbar**

The Reporting Object tool Quick Launch toolbar is a static menu whose commands apply to the entire Reporting Object, not simply to the particular component that you have selected. The following table describes each command in the Reporting Object tool Quick Launch toolbar.

Button	Shortcut Keys	Command	Description
	None	Reporting Object tool main menu	Launches a menu allowing you to Save, Save As, Run, and Exit.
	Ctrl+S	Save	Saves the Reporting Object.
	Ctrl+Z	Undo	Undoes the last action.
	Ctrl+Y	Redo	Repeats the last action.
	None	View code	Displays Reporting Object code in a read-only window.
	Ctrl+R	Run	Runs the Reporting Object.

Reference: Reporting Object Tool Ribbon

The Reporting Object tool ribbon is a menu whose commands apply to what you have selected, whether that is the Reporting Object as a whole, a particular component, or an individual example of a component. For example, a particular filter or filter group, if you have selected one, rather than selecting the entire Filter component.

The following table describes each command on the Reporting Object tool ribbon.

Button	Command	Description
New	New	Creates a new join, DEFINE statement, filter, or WHERE statement.
Open	Open	Launches InfoAssist to create or edit a report or chart, or launches the appropriate tool to create or edit a join, DEFINE statement, filter, or WHERE statement.
Edit	Edit	Opens component source code in the text editor.
Properties	Properties	Renames the selected filter or filter group.
Run	Run	Runs the selected component.
Delete	Delete	Deletes the selected item.

Button	Command	Description
	Delete All	Deletes all items of the type selected, for example, all WHERE statements, all filters in a particular group, or all filters in every group if the Filter component itself is selected.

Procedure: **How to Create a Reporting Object**

1. Sign in to WebFOCUS.

2. Access the Reporting Object tool in one of the following ways:

   ❏ From the WebFOCUS Home Page, on the Action Bar, click *Reporting Object* . The Open dialog box opens. Proceed to step 5.

   ❏ From the Legacy Home Page, in the Resources tree, right-click the domain or folder where you want to create the Reporting Object, point to *New*, and then click *Reporting Object*.

3. In the Tool Setup dialog box, select the server where the sample data is loaded, and assign the Application where your data resides, or accept the default settings.

   Note: The Tool Setup dialog box is only available on the Legacy Home Page. On the WebFOCUS Home Page, you must set a WebFOCUS Reporting Server and Application Paths on the folder level in the Properties prior to creating content.

4. Click *OK*.

   The Open dialog box opens, prompting you to select a Master File.

5. Select a Master File and click *OK*.

   The Reporting Object tool appears.

Procedure: **How to Edit a Reporting Object**

Right-click the Reporting Object and select *Edit*.

Note: Double-clicking the Reporting Object runs the Reporting Object rather than allowing you to edit it.

Procedure: **How to Save a Reporting Object**

1. Press Ctrl+S or click the *Save* [icon] icon on the Quick Launch toolbar.

   The Save dialog box opens.

2. Type the name of the new Reporting Object in the Title field and click *OK*.

   From now on, clicking *Save* or pressing Ctrl+S saves the Reporting Object without launching the Save dialog box.

Running a Reporting Object From the Browser

You can run a Reporting Object or any individual component of it from the browser. You can run a Reporting Object in the following ways:

❏ Select the object in the Reporting Object tool and click *Run,* or right-click the object and select *Run*.

❏ Right-click the Reporting Object in the tree and select *Run* or *Run Deferred*.

The Run option in the Reporting Object tool is enabled regardless of the setting of the *Only Run as a Deferred Report* property.

Expected Behavior of Running a Reporting Object

When you select and run a Reporting Object, the expected behavior is as follows:

❏ When you define a Report or Chart component, all components of the Reporting Object run.

❏ When you define a Report and Chart component, an HTML page opens, which enables you to select which component to run.

❏ When you define filters in a Reporting Object, an HTML page opens, which enables you to select from the defined filters of the Reporting Object.

❏ When you define parameters in a report or chart and the Reporting Object Prompt for Parameters property is specified, an HTML page opens, which prompts you for parameter values.

❏ Reporting Object components are validated prior to run time. This means that errors are found and corrected more easily, since errors in individual components are detected prior to run time.

❏ If you attempt to run a Reporting Object that is created without using the Report or Chart component, you receive the message:

   `Your request did not return any output to display.`

```
Possible causes:
- No data rows matched the specified selection criteria.
- Output was directed to a destination such as a file or printer.
- An error occurred during the parsing or running of the request.
```

Properties of a Reporting Object

From the WebFOCUS Home Page or Legacy Home Page, you can view or edit the properties of a Reporting Object by right-clicking the object and selecting *Properties*. The Reporting Object Properties dialog box opens.

Components of a Reporting Object

A Reporting Object may contain any of the following types of components, which are run in the order of precedence, as listed:

❏ Preprocessing Other (custom code that runs before all other components)

❏ Joins

❏ DEFINE statements

❏ Filters, when applicable

❏ WHERE statements

❏ Report or chart templates

❏ Postprocessing Other (custom code that runs after all other components)

Users using the Reporting Object to create a report do not see the DEFINE statements, WHERE statements, or JOIN commands defined in the Reporting Object, which are issued automatically every time a user accesses the Reporting Object. However, the report or chart components, including headers, footers, and styling features, are visible to authorized users who can use them to create their own customized report.

The filters defined in the Filter component are applied only if the user of the Reporting Object activates them when the report or chart based on the Reporting Object is run.

Preprocessing Other Component

The Preprocessing Other component contains custom code that must run before all other components. You can use the text editor in the component to create and edit code or to paste the code that you have copied from another application.

To create or edit a Preprocessing Other component, do one of the following:

❏ Double-click the component.

❏ Select the component and click *Edit* on the ribbon.

❏ Right-click the component and select *Edit.*

The Preprocessing Other text editor appears.

See the *Creating Reports With TIBCO WebFOCUS® Language* manual for more information about using the WebFOCUS language to code procedures.

Note:

❏ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.

❏ Commands in the Preprocessing Other component should not return a displayable answer set.

❏ InfoAssist previews in the Report component and the Chart component are disabled if the Preprocessing Other component contains the syntax:

```
-OLAP ON
```

To avoid this issue, enable OLAP through the Reporting Object properties instead of the Preprocessing Other component. For more information on the Reporting Object properties, see *Properties of a Reporting Object*.

Reference: **Considerations for Amper Auto Prompting With the Preprocessing and Postprocessing Other Components**

When using Amper Auto prompting, users may be prompted to supply amper variable values for parameters that the private user content does not reference. These scenarios are directly related to the internal processing of reports created using a Reporting Object.

Auto prompting considerations and expected behavior must be understood when referencing amper variables within a Reporting Object. For information on the Amper Auto prompting facility, see the *TIBCO WebFOCUS® Developing Reporting Applications* manual. The specification of values for the amper variables in the Reporting Object Other component using –DEFAULT, –DEFAULTH, or –SET commands will assign a default value for amper variables in a report request to avoid a FOC error for not specifying a value. A consideration for –DEFAULTH and –SET is that Amper Auto prompting does not prompt for amper variables that have values assigned using –DEFAULTH and –SET.

Whether a user is prompted by the Amper Auto prompting facility for amper variables assigned a default value using the –DEFAULT command is dependent on the setting of the WebFOCUS® Client configuration parameter, IBIMR_prompting. When IBIMR_prompting is set to XMLPROMPT, users are prompted for amper variable values, and default values are displayed in fields in which the default values have been specified. When IBIMR_prompting is set to XMLRUN, users are not prompted for values when all amper variables have been assigned a default value. For more information on setting the IBIMR_prompting parameter, see the *TIBCO WebFOCUS® Security and Administration* technical content.

Reference: ## Creating a Reporting Object That Uses a HOLD File

Suppose that your company has a data warehouse and you need a Reporting Object that uses an extract from that data warehouse. In your Preprocessing Other component, you create a HOLD file from the data warehouse, and then you use that HOLD file in each Reporting Object component. You can clear the JOIN command and delete the HOLD file in the Postprocessing Other component so that it is not mistakenly used again the next time that the Reporting Object is used.

This task has the following steps:

1. Create a HOLD file in the Preprocessing Other component.

2. Create a new Join component with two joins.

3. Use the Report component to create a new report in InfoAssist.

4. Clear the JOIN command and delete the HOLD file in the Postprocessing Other component.

5. Run the Reporting Object, and then view the object source to verify that the output is correct.

6. Verify that the HOLD file does not exist in the location in which it was created.

Example: ## Creating a HOLD File With the Preprocessing Other Component

1. Create a Reporting Object with the baseapp and ibisamp selected as the application paths and employee as the Master File.

   For more information on creating a Reporting Object, see *Properties of a Reporting Object*.

2. Select the Preprocessing Other component and click *Edit*.

3. Type the following code:

```
APP HOLD IBISAMP
TABLE FILE EMPLOYEE
PRINT EMPLOYEE.EMPINFO.DEPARTMENT AS 'NEWDEP'
EMPLOYEE.EMPINFO.CURR_SAL AS 'NEWCURR_SAL'
BY EMPLOYEE.EMPINFO.EMP_ID AS 'EMP_ID'
BY EMPLOYEE.EMPINFO.HIRE_DATE AS 'NEWHIRE_DATE'
ON TABLE HOLD AS WINFILE FORMAT FOCUS INDEX EMP_ID
END
```

4. Click *Save,* and then close the text editor.

5. To verify that the component works properly, select the Preprocessing Other component and click *Run.*

   The following output is produced:

```
0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
```

Example: Creating a New Join Component With Two Joins

1. Select the *Join* component and click *New.*

   The Join component is prefilled with the data from the employee Master File.

2. Click *Add New,* select the winfile Master File, and click *OK.*

3. Click the *Add New* button, select the jobfile Master File, and click *OK.*

4. Click *OK* to close the Join tool, saving your changes.

5. Click *View Code* in the Reporting Object Quick Launch toolbar to review the code.

   The following code for the Join component is displayed:

```
-*COMPONENT=Join_J001
JOIN EMPLOYEE.EMPINFO.EMP_ID IN IBISAMP/EMPLOYEE
TO UNIQUE WINFILE.SEG01.EMP_ID IN IBISAMP/WINFILE TAG J001 AS J001
END
-*COMPONENT=Join_J002
JOIN EMPLOYEE.PAYINFO.JOBCODE IN IBISAMP/EMPLOYEE
TO UNIQUE JOBFILE.JOBSEG.JOBCODE IN IBISAMP/JOBFILE TAG J002 AS J002
END
```

Example: Creating a Report With the Report Component

1. Double-click the *Report* component.

   InfoAssist is launched.

2. Drag the NEWCURR_SAL measure from the Data pane to the canvas.

3. Drag the EMP_ID dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.

4. Drag the NEWHIRE_DATE dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.

5. Drag the NEWDEP dimension to the left of the NEWCURR_SAL column in the canvas, and select *Drop as sort*.

   The report is displayed as a table with four columns, sorted by EMP_ID.

6. Save the report and exit InfoAssist.

7. To verify that the component works properly, click *Run* on the Quick Launch toolbar.

   The report that you created in InfoAssist is displayed in the browser.

Example: **Deleting the Join in the Postprocessing Other Component**

1. Select the *Postprocessing Other* component and click *Edit*.

2. Type the following:

   ```
   JOIN CLEAR *
   ? JOIN
   ```

3. Click *Save*, and then click *Exit*.

4. To verify that the Reporting Object works properly, click *Run* on the Quick Launch toolbar.

   The report that you created in InfoAssist is displayed in the browser.

5. Right-click the report webpage and select *View source*.

   Note: Depending on your browser, information may display differently.

6. Scroll to the bottom of the source window.

   The following comment is displayed:

   ```
   <!--
   0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
   0 NUMBER OF RECORDS IN TABLE= 12 LINES= 12
   0 HOLDING HTML FILE ON PC DISK ...
   JOINS CURRENTLY ACTIVE
   HOST                            CROSSREFERENCE
   FIELD        FILE       TAG     FIELD      FILE       TAG AS ALL WH
   -----        ----       ---     -----      ----       --- -- --- --
   EMPLOYEE.EM&gt;EMPLOYEE          WINFILE.SEG&gt; WINFILE J0 J0 Y N
   EMPLOYEE.PA&gt;EMPLOYEE          JOBFILE.JOB&gt; JOBFILE J1 J1 Y N
   0 NO JOINS CURRENTLY IN EFFECT
   -->
   ```

Joins

A join is a temporary connection between two or more data sources that share at least one common field. After you join two data sources, each time that WebFOCUS retrieves a record from the first data source (the host file), it also retrieves the matching records from the second data source (the target file).

For more information on joining data sources, see the *TIBCO WebFOCUS® InfoAssist User's Manual*.

Note:

❏ When you join two FOCUS data sources, the target file field must be indexed or the join must be a WHERE-based join. If you attempt to link to a non-indexed target file, the Reporting Object tool offers you the opportunity to create a WHERE-based join. For more information on creating WHERE-based joins, see *Join Group* in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

❏ Since every procedure creates a new session on the WebFOCUS Reporting Server when it is run, the duration of your connection is always limited to a single procedure. Therefore, any join issued at the beginning of a procedure is in effect only for those report requests that are called in the same procedure.

Procedure: How to Create a Join

1. Right-click the *Joins* component and select *New*, or select the *Join* component and click *New* on the ribbon.

   The Join tool opens, displaying the data source associated with the Reporting Object.

2. Create a join using the Join tool.

   For more information on using the Join tool, see *Join Group* in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

3. When you are finished, click *OK* to return to the Reporting Object tool.

Procedure: How to Delete a Join

To delete a join, right-click the join and select *Delete*, or select the join and click *Delete* on the Quick Launch toolbar.

Procedure: How to Rename a Join

1. In the Join tool, select a join by clicking its connector line, and then click *Edit* on the Join toolbar.

   The Edit Join dialog box opens.

2. Type a new description in the Description box and click *OK* to return to the Join tool.

   The new description appears under the Join component in the Reporting Object tool. The internal name used for the join remains the same name assigned to the join when you created it.

Procedure: **How to View or Edit Join Syntax in a Text Editor**

1. Select the join and click *Edit* on the ribbon, or right-click the join and select *Edit*.

   The join code is displayed in a text editor.

2. Make the desired changes and click *Save* to return to the Reporting Object tool. To exit without making any changes, click *Close*.

Virtual Fields (DEFINE Statements)

A virtual field is a field whose value is not stored in the data source but can be calculated from the data that is there. A virtual field takes up no storage space. It is created only when a user accesses the Reporting Object that includes the virtual field.

You use the Define tool to create a virtual field. Using this tool, you specify the virtual field name and format, and the expression that defines the field. An expression enables you to combine fields, constants, predefined functions, and operators into an operation that produces a single value. When you define a virtual field, you must specify a field format type, length, and appropriate display options.

For more information about defining fields, see *Data Tab* in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

Procedure: **How to Create a Virtual Field**

1. Right-click the *Defines* component and select *New*, or select the *Define* component and click *New* on the ribbon.

The Define tool dialog box opens, as shown in the following image.
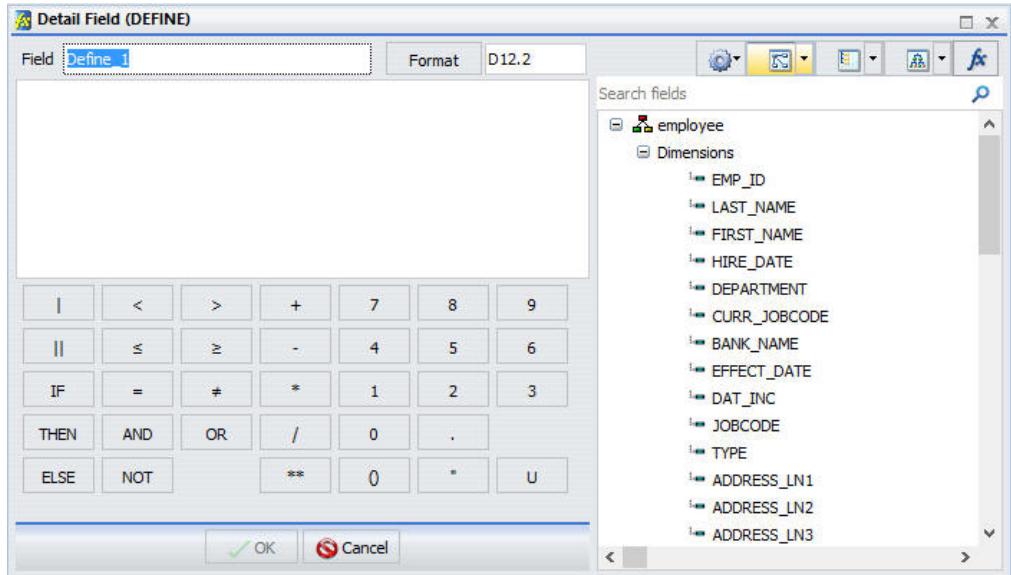
2. Create a virtual field using the Define tool.

    For more information about the Define tool, see *Data Tab* in the *TIBCO WebFOCUS*®
    InfoAssist User's Manual.

3. Click *OK* to save the virtual field and return to the Reporting Object tool.

    The virtual field now appears in the field list when a user accesses this Reporting Object.

Note:

❑ The field list shown in the Define tool is not updated to display new virtual fields until you exit from the Define tool and reopen it. If you are creating a virtual field (DEFINE statement) that uses a previously created virtual field in the expression, you must save the first virtual field before creating the second one.

To save the first virtual field, exit from the Define tool by clicking *OK*. Reopen the Define tool to create the second field. Alternatively, you can type the name of the first virtual field in the expression instead of selecting it from the field list. In this case, you do not need to exit and reopen the Define tool.

❑ Since every procedure creates a new session on the WebFOCUS Reporting Server when it is run, the duration of your connection is always limited to a single procedure. Therefore, any DEFINE statements issued at the beginning of a procedure are in effect only for those report requests that are called in the same procedure.

Procedure: **How to Edit a Virtual Field**

Existing virtual fields appear under the Defines node, as shown in the following image.
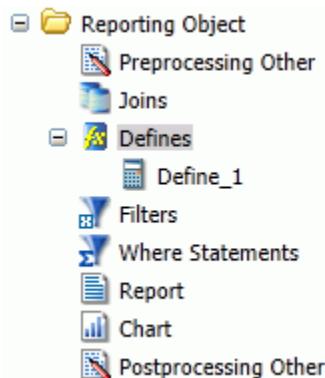
1. Right-click the virtual field that you want to edit and select *Open*, or select the virtual field and click *Open* on the ribbon.

   The Define tool dialog box opens, displaying the selected field.

2. Make changes to the field name, expression, or format, and click *OK* to return to the Reporting Object tool.

Procedure: **How to View or Edit a Virtual Field in the Text Editor**

1. Right-click the virtual field that you want to view or edit as text and select *Edit*, or select the virtual field and click *Edit* on the ribbon.

The Text Editor opens, displaying the selected field.

2. Make changes to the field name, expression, or format, and click *OK* to return to the Reporting Object tool.

Procedure: **How to Delete a Virtual Field**

1. Right-click the virtual field that you want to delete and select *Delete*, or select the virtual field and click *Delete* on the ribbon.

2. To delete all virtual fields at once, right-click the *Defines* component and select *Delete All*, or select the component and click *Delete All* on the ribbon.

Filters

Filters enable users to quickly select predefined criteria that limit the data included in a report or chart. Filters are selection criteria (WHERE statements) that you create for users, who then select the filters needed to limit the data in a report or chart without having to create their own selection criteria.

In order to create a filter, you must create the filter group and define the filters that make up the group.

Note: The Undo and Redo functions are not available for the Filter component until you have created at least one filter.

For more information about filters, see the *Using Filters to Customize the Display of Data* topic in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

Procedure: **How to Create a Filter Group**

1. Right-click the *Filters* component and select *New*, or select the *Filter* component and click *New* on the ribbon.

   The Reporting Object Filter Group dialog box opens.

2. In the Filter Group Name field, type a descriptive name for the filter group folder.

   Make the filter group name as explicit as possible, because users depend on this name to select the correct filter to apply to their reports.

3. Click *OK*.

   You are returned to the Reporting Object tool. The filter group folder appears below the Filter component node.

Procedure: **How to Define a Filter**

1. Right-click the Filter group to which you would like to add a filter and select *New*, or select the Filter group folder and click *New* on the Quick Launch toolbar.

   The Reporting Object Filter dialog box opens.

2. In the Filter Name field, type a descriptive name for the filter and click *Add New* if you plan to create multiple filters, or click *OK* if you plan to create only one filter.

   Make the filter names as explicit as possible, because users depend on these names to select the correct filter to apply to their reports.

   The Advanced Filter dialog box opens, as shown in the following image.
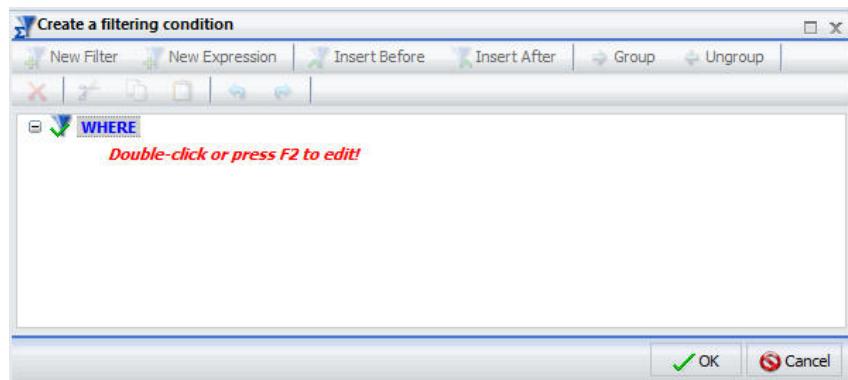
3. Use the Advanced Filter dialog box to create the filter.

   For more information about defining filters, see *Data Tab* in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

4. When you have created the filter, click *OK*.

   If you clicked *Add new* in step 2, the New Filter dialog box opens. If you clicked *OK* in step 2, you are returned to the Reporting Object tool.

Procedure: **How to Edit a Filter**

Existing filters appear under the Filter group beneath the Filters node, as shown in the following image.
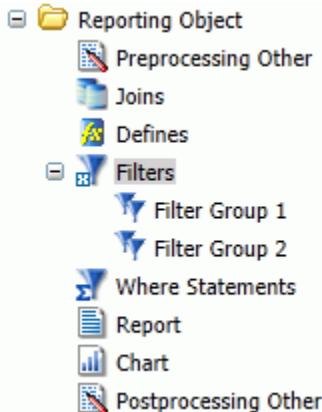
1. Right-click the filter that you want to edit and select *Open*, or select the filter and click *Open* on the ribbon.

   The Advanced Filter dialog box opens, displaying the selected filter.

2. Make your changes and click *OK* to return to the Reporting Object tool.

Procedure: **How to Rename a Filter or Filter Group**

1. Right-click the filter or filter group that you want to rename and select *Properties*, or select the filter or filter group and click *Properties* on the ribbon.

2. Type the new filter or filter group name in place of the current one and click *OK*.

Procedure: **How to Delete a Filter or a Filter Group**

1. Right-click the filter or filter group that you want to delete and select *Delete*, or select the filter or filter group and click *Delete* on the ribbon.

2. To delete all filters at once, right-click the *Filter* component and select *Delete All*, or select the component and click *Delete All* on the ribbon.

Procedure: **How to View or Edit a Filter in the Text Editor**

1. Right-click the filter that you want to view or edit as text and select *Edit*, or select the filter and click *Edit* on the ribbon.

   The text editor opens, displaying the selected filter.

2. Make your changes and click *OK* to return to the Reporting Object tool.

Reference: **Filter Considerations With Amper Auto Prompting**

When Amper Auto prompting is used (*Prompt for Parameter*s is selected in the Reporting Object properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Selection Criteria (WHERE Statements)

WHERE statements or selection criteria, restrict the data retrieved to only those records that meet the conditions that you specify. Filters are selection criteria that run when the user selects the filter in WebFOCUS. Other selection criteria run when the user opens the Reporting Object, preventing data values that do not meet the criteria from being available to the user.

For more information on WHERE statements, see *Field Tab* in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

Procedure: **How to Create Selection Criteria**

1. Right-click the *Where Statements* component and select *New*, or select the component and click *New* on the ribbon.

   The New Filter dialog box opens.

2. Double-click the red text or press F12 to edit the WHERE statement.

   For more information on creating selection criteria, see the *Using Filters to Customize the Display of Data* topic in the *TIBCO WebFOCUS® InfoAssist User's Manual*.

3. When you have created the selection criterion, click *OK* to return to the Reporting Object tool.

Report Component

The Report component creates a report template and saves it in a Reporting Object. Authorized users can use the report template to create a report that suits their needs and then save the new report.

To create a report template, double-click the *Report* component, or right-click the component and select *Open*. InfoAssist opens, allowing you to create a report template.

For more information on using InfoAssist, see the *TIBCO WebFOCUS® InfoAssist User's Manual.*

Note:

❏ To open the report source code in the text editor instead of InfoAssist, right-click the *Report* component and select *Edit*. Manual changes to the code may make the report incompatible with InfoAssist.

❏ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.

❏ If the Reporting Object contains both a report and a chart, the user is asked whether to run the object as a report or chart. The Reporting Object cannot be run simultaneously as both.

❏ When Amper Auto prompting is used (*Prompt for Parameters* is selected in the Reporting Objects properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Chart Component

The Chart component works exactly like the Report component. The Chart component creates a chart template and saves it in a Reporting Object. Authorized users can use the chart template to create a chart that suits their needs and then save the new chart.

To create a chart template, double-click the *Chart* component, or right-click the component and select *Open*. InfoAssist opens, allowing you to create a chart template.

For more information on using InfoAssist, see the *TIBCO WebFOCUS® InfoAssist User's Manual.*

Note:

❏ To open the chart source code in the text editor instead of InfoAssist, right-click the *Chart* component and select *Edit*. Manual changes to the code may make the chart incompatible with InfoAssist.

❏ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.

❏ If the Reporting Object contains both a report and a chart, the user is asked whether to run the object as a report or chart. The Reporting Object cannot be run simultaneously as both.

❏ When Amper Auto prompting is used (*Prompt for Parameters* is selected in the Reporting Object properties), there are scenarios in which users are prompted to provide amper variable values in selection criteria (WHERE statements) in the Reporting Object that the user did not save with the report. This is due to the internal processing of private reports created from Reporting Objects. You can avoid this issue by using the Filter component to predefine selection criteria for users to include in reports. Only the filter or filters that users select for inclusion in their reports are evaluated by the WebFOCUS Amper Auto prompting facility.

Postprocessing Other Component

The Postprocessing Other component contains custom code that must run after all other components. You can use the text editor in the component to create and edit code, or to paste the code that you have copied from another application.

To create or edit a Postprocessing Other component, double-click the component, or select the component and click *Edit* on the ribbon. Alternatively, right-click the component and select *Edit*. The Postprocessing Other dialog box opens.

See the *Creating Reports With TIBCO WebFOCUS® Language* manual for more information about using the WebFOCUS language to code procedures.

Note:

❏ Syntax and error checking is not performed on the commands that you type until the Reporting Object is run.

❏ Commands in the Postprocessing Other component should not return a displayable answer set.

❏ InfoAssist previews in the Report component and the Chart component are disabled if the Postprocessing Other component contains the syntax:

```
-OLAP ON
```

To avoid this issue, enable OLAP through the Reporting Object properties instead of the Postprocessing Other component. For more information on the Reporting Object properties, see *Properties of a Reporting Object*.

For information on Amper Auto Prompting, see *Considerations for Amper Auto Prompting With the Preprocessing and Postprocessing Other Components*.

URL Tool

One of the WebFOCUS resources available to you is a URL. A URL is a link to a website.

For full documentation on the URL tool, see *URLs* on page 94.

Text Editor

The text editor enables you to create, view, and edit the source code for procedures, procedure components, Master Files and Access Files, and other types of files required by your applications. The Text Editor enables you to find and replace text within the source code.

In addition, you can run procedures or procedure components directly from the Text Editor. You can also save the source code with a different name.

Since the Text Editor is fully integrated with the graphical toolset, changes you make to source code are immediately reflected in the graphical tools, and vice versa.

Accessing the Text Editor

You can access the Text Editor in one of four ways:

❏ From the WebFOCUS Home Page, in the Action Bar, click the Text Editor button .

❏ From the WebFOCUS Home Page, right-click an item you want to modify, and then click *Edit with text editor*.

❏ From the Legacy Home Page, right-click a domain or folder, point to *New*, and then click *Text Editor*.

❏ From the Legacy Home Page, right-click an item you want to modify, point to *Edit With*, and then click *Text Editor*.

Scheduling Tools

A ReportCaster schedule allows you to specify when to run a report, the format in which to create the output, and the method of distribution. You create a ReportCaster schedule with the Basic Scheduling tool or the Advanced Scheduling tool.

The ReportCaster Basic Scheduling tool provides you with the ability to create a schedule for a WebFOCUS procedure (FEX) from a tree folder.

The Advanced Scheduling tool has the same scheduling options as the Basic Scheduling tool. It provides you with the ability to create a schedule for a WebFOCUS Reporting Server procedure (FEX), a WebFOCUS Repository procedure (FEX), a file accessible to the Distribution Server, or a file from an FTP server. You can also create a schedule for a fully qualified URL to submit to a web or application server.

For more information on the scheduling tools, see the *TIBCO WebFOCUS® ReportCaster Guide*.

Using Deferred Reporting

The following topics provide an overview of the Deferred Report Status Interface, including a detailed description of its appearance and functions. Specific procedures guide you through viewing, saving and deleting reports, deleting deferred reports that are being processed but are not yet complete, and reviewing parameters for reports containing amper variables.

A Deferred Report is a report that you can run as a background task, while continuing other work. Once you submit a report, you can continue working while WebFOCUS processes the report. Deferred Reporting is a very useful WebFOCUS option. For more information about Deferred Reporting, see the *TIBCO WebFOCUS*® *Security Administration* and the *TIBCO WebFOCUS*® *Deferred Reporting Administration* manuals.

Running a Report as Deferred

When you run a report as deferred, the report title is assigned as the deferred report description by default. If the Custom Deferred Report Description feature is enabled, you are prompted to edit a report description. This feature allows you to distinguish between the outputs of the same report that you ran at different times.

You can view information about a deferred report in the Deferred Report Status interface window. The window indicates the time the report was submitted and whether the report was completed, and also provides Delete, View, Save, as well as Run or Parameters options.

Procedure: **How to Run a Report as Deferred**

1. From the Resources tree, right-click a report that you want to run as deferred, and then click *Run Deferred*.

   If the Custom Deferred Report Description feature is enabled, the Deferred Report Description dialog box opens, as shown in the following image. If you run a parameterized report as deferred, the Deferred Report Description field is displayed in the Parameters prompt window.
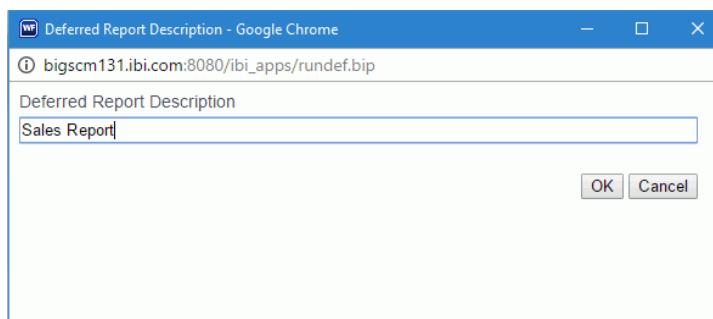
Note: The Custom Deferred Report Description feature is disabled by default. To enable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder, then click *Deferred Reporting*. Set the Prompt for Custom Deferred Report Description (IBI_DEFERRED_CUSTOM_DESCRIPTION) setting to *True*.

2. Optionally, type a new or updated description and click *OK*.

   The Deferred Report Notification dialog box appears, reflecting the updated description, as shown in the following image.


3. To open the Deferred Report Status window directly from the dialog box, click the *Deferred Report Status* link.

   To review the deferred report later, close the dialog box. On the BI Portal Menu bar, click *Tools*, then click *Deferred Status*.

Using the Properties Option

The Properties option for a procedure (FEX) displays a dialog box that contains a number of different options that define the use and accessibility of a report, as shown in the following image. You can use the Use Title for Deferred Report Description Properties option to specify to use the Title of the report and not prompt for a custom Deferred Report description when the report is run deferred. This option is not evaluated when the configuration setting to prompt for a custom Deferred Report description is set to False (Prompt for Custom Deferred Report Description (IBI_DEFERRED_CUSTOM_DESCRIPTION)).
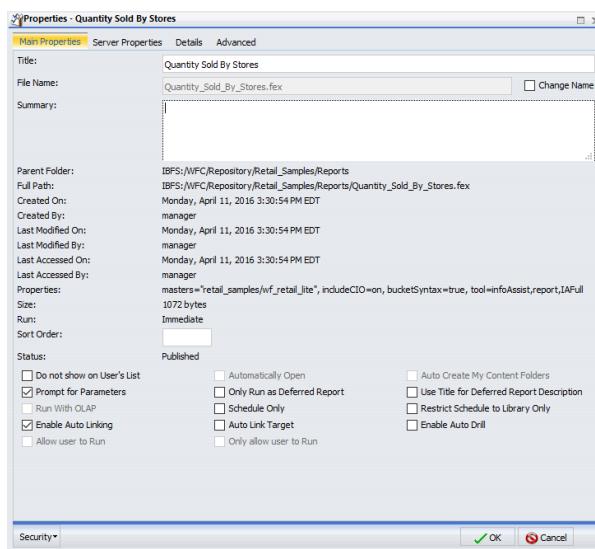
When the Use Title for Deferred Report Description is selected, the prompt for the custom Deferred Report description does not appear and the title of the deferred report is assigned as the Deferred Report description when the report is run deferred. If you want to customize the Deferred Report description, do not select the Use Title for Deferred Report Description property and verify the configuration setting to prompt for a custom Deferred Report description is set to True.

Deferred Report Status Interface Overview

The Deferred Report Status Interface enables you to obtain information about deferred reports. From this Interface, you can perform the following actions on a deferred report:

❑ Sort deferred report output by date, description, Domains, and server ID.

❑ View deferred report output.

❏ Delete a deferred report from the WebFOCUS Reporting Server.

❏ Save the report output as private content.

❏ Run the deferred report again.

❏ Review parameters and select new parameters with which you can run a new report.

   Note: Selecting new parameters generates a new deferred report, which will appear in the Deferred Report Status Interface.

❏ View the number of days remaining prior to expiration (deletion) on the server.

❏ Terminate a deferred request that is in the deferred report queue.

❏ Terminate a deferred report that is running.

❏ Delete all expired, unknown, completed, running, and queued tickets.

The Deferred Report Status Interface includes:

❏ A banner at the top of the window that lists the date and time of the request.

❏ A gray toolbar below the banner that contains Refresh and Help options, a Sort By drop-down list to select sort values, a sort order button to toggle between ascending and descending order, and a Delete drop-down list. The Delete drop-down list has options to delete All, All Completed, All Running, All Queued, All Expired, or All Unknown reports, depending on which report status types exist in the Interface.

❏ The status of each report within the Interface.

You can access the Deferred Status Report Interface from:

❏ WebFOCUS App Studio, by selecting the *Deferred Status* option from the WebFOCUS Administration menu.

❏ BI Portal, by selecting *Tools* on the Menu bar, then clicking *Deferred Status.*

❏ Deferred Report Submit Notification, which appears when you run a report as deferred.

   Note: The Deferred Report Submit Notification feature is enabled by default. To disable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Display Deferred Request Submitted Notification (IBI_DEFERRED_NOTIFY_SUBMITTED)) setting to *False*.

Sort Controls for the Deferred Report Status Interface

The sorting feature pertains to the entire report. When the default sort value (Date/Time Submitted) is changed, the new primary sort becomes your choice, but the secondary sort is always fixed as Date/Time Submitted. To resort the list, select the Sort by option:

❏ Date (default)

❏ Description

❏ Domain

❏ Server Id (This does not actually appear as a column. For more information, see *Special Behavior for Sorting by WebFOCUS WebFOCUS Reporting Server User ID*.)

You can optionally change the sort order (ascending or descending) by clicking the Reverse

Sort Order ![A/Z] button, which toggles between A to Z and Z to A.

Note: When the sort value is Date, the sort order option A to Z means from new to old and not alphabetical from A to Z.

To see the results of the new sort options, click *Refresh*.

Deferred Report Status

The status of deferred requests are organized under the following sections within the Interface:

❏ **Completed.** Indicates that the Deferred Receipt request has finished processing.

❏ **Running.** Indicates that the Deferred Receipt request is processing.

❏ **Queued.** Indicates that the Deferred Receipt request is queued for processing.

❏ **Unknown.** Indicates that the Deferred Receipt request cannot be identified. The following table shows the tickets that are identified as Unknown and the information that is displayed in the Status column for each of these tickets.

Reason	Status Column Information
Deferred processing confirms the ticket does not exist on the WebFOCUS Reporting Server.	Expired.
Error comes from WebFOCUS Reporting Server limit.	The size of the report exceeds limit.

Reason	Status Column Information
WebFOCUS Reporting Server Agent failure.	Abnormal termination of WebFOCUS Reporting Server agent.
Failed to connect to the WebFOCUS Reporting Server.	Server <srv_name> unavailable.
WebFOCUS Reporting Server is not defined in odin.cfg.	Server <srv_name> unavailable.

For more information, see *Deferred Report Expiration Setting* on page 274.

The following image shows a sample Deferred Report Status window with one completed report and two queued reports.

Column headings provide information about the published content including the date and time the published content was submitted, the domain of origin, a description of the report (the report name), an expiration indicator, and an Options heading for options within the Deferred Report Status Interface.

When you select the Deferred Status option, the status for all the deferred requests submitted by your Managed Reporting user ID is retrieved. Depending on how Managed Reporting is configured, deferred status may be coming from multiple WebFOCUS WebFOCUS Reporting Servers on various platforms. If credentials are required for the connections, you are prompted by the WebFOCUS Dynamic Server System Signon feature. You can view the status of all the deferred requests submitted by your Managed Reporting user ID, but can only delete, view, save, stop, or review parameters for deferred requests submitted with an identical WebFOCUS WebFOCUS Reporting Server user ID.

Caution: Sharing Managed Reporting user IDs is not recommended.

The options available in the Deferred Report Status Interface are based upon the status of the report request and security validation. You can perform various functions by clicking the buttons under the following options.

For more information on configuring Deferred Report Status options and buttons, see *Technical Memo 4719: Managed Reporting - Deferred Status Interface How to Hide Deferred Report Options (Buttons)*.

❏ **Delete.** Available for all report status types. The Delete option deletes the deferred request according to the report status, as follows:

  ❏ **Queued.** When a deferred request is listed in the Queued tab, the Delete option removes the deferred report from the WebFOCUS WebFOCUS Reporting Server and deletes the deferred request ticket from the WebFOCUS Repository.

  ❏ **Unknown.** When a deferred request is listed in the Unknown tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository.

  ❏ **Completed.** When a deferred request is listed in the Completed tab, the Delete option removes the report from the window, deletes the deferred report results from the WebFOCUS WebFOCUS Reporting Server, and deletes the deferred request ticket from the WebFOCUS Repository.

  ❏ **Running.** When a deferred request is listed in the Running tab, the Delete option deletes the deferred request ticket from the WebFOCUS Repository and cancels the job on the WebFOCUS WebFOCUS Reporting Server.

Note: The Delete drop-down list in the toolbar at the top of the Interface provides options to delete All, All Completed, All Running, All Queued, All Expired, or All Unknown reports, depending on which report status types exist in the Interface.

❏ **View.** Available when the report status is Completed.

The View option displays the completed report in a new browser session, or the report format may result in the opening of a Windows dialog box that prompts you to save the report to disk or open the report within an application (such as Microsoft® Excel®, Microsoft® Word®, or Adobe® Acrobat®).

❏ **Save.** Available when the report status is Completed.

The Save option allows you to save Deferred Receipt reports to the WebFOCUS Repository, if your administrator has authorized you to save deferred reports and to create private content. You can save the report output to your My Content folder or a folder you are authorized to create content in and write to. When your deferred report is saved to the WebFOCUS Repository, it is removed from the Deferred Report Status Interface. For more information on security privileges, see the *TIBCO WebFOCUS® Security Administration* manual.

Note: This option appears for users authorized to save deferred reports.

❏ **Run.** Available for reports without parameters when the report status is completed or queued. The Run option runs the report deferred again. If the Custom Deferred Report Description feature is enabled, you are also prompted for a new deferred report description.

Note: The Custom Deferred Report Description feature is disabled by default. To enable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Prompt for Custom Deferred Report Description (IBI_DEFERRED_CUSTOM_DESCRIPTION) setting to *True*.

❏ **Parameters.** Available for reports with parameters when the report status is completed or queued. The Parameters option allows you to review parameters or select new parameters when the parameter prompting configuration specifies to always prompt for parameters (XMLPROMPT). When the parameter prompting configuration specifies to run the report when all parameters for the report are assigned a default value (XMLRUN), the parameters saved with the deferred ticket are used and prompting only occurs if there are parameters that are not assigned a default value. Selecting new values for the parameters or running with the same parameter values generates a new deferred report, which will appear in the Deferred Report Status Interface. If the Custom Deferred Report Description feature is enabled, you are also prompted for a new deferred report description.

Note: Deferred reports run from within any report development tool do not have an option to view or change amper variable parameter values in the Deferred Status Interface window.

Under certain circumstances, WebFOCUS is unable to submit the request to run in deferred mode. This can occur, for example, when the WebFOCUS WebFOCUS Reporting Server is unavailable. When WebFOCUS is unable to submit a deferred request, a Deferred Receipt Notification window opens, notifying you of the failure.

Note: The Deferred Report Submit Notification feature is enabled by default. To disable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Display Deferred Request Submitted Notification (IBI_DEFERRED_NOTIFY_SUBMITTED) setting to *False*.

Deferred Report Expiration Setting

The number of days until expiration appears next to each report. On the last day, the value Today appears.

The following image shows the results of a deferred status request, run on the afternoon of Friday, April 27. (The current date appears in the status bar at the top of the page.) Each report is listed with the time remaining before it is deleted from the WebFOCUS WebFOCUS Reporting Server. The time remaining is based on 24-hour intervals (rather than whole days), beginning with the time that the report was submitted. For example, the last report shown on the list will be deleted shortly after 1:10 pm on April 28, not at midnight on April 27.

If a deferred report is not saved or deleted prior to its expiration, the output is automatically deleted from the WebFOCUS WebFOCUS Reporting Server dfm_dir directory and the deferred report is moved to the Unknown status tab in the Deferred Report Status Interface. From here, you can only delete the orphaned report.

If deferred output expiration is not configured on your WebFOCUS WebFOCUS Reporting Server, then the value Never appears next to each report under the Expires In column.

Note: This setting does not affect deferred output saved to your private content area.

Special Behavior for Sorting by TIBCO WebFOCUS Reporting Server User ID

Sorting by WebFOCUS WebFOCUS Reporting Server user ID enables you to bring deferred reports you want to interact with to the top of the list. At the same time, the deferred reports that you cannot interact with are pushed to the bottom of the list and sorted alphabetically.

This is a special sort. Regardless of the setting for A to Z or Z to A when the sort value is Server ID, deferred reports for the current ID appear at the top. These are followed, in sort order, by deferred reports for other Server IDs, if any exist. The Server ID automatically appears in the Options column.

Example: **Sorting by Server ID**

You may see deferred reports listed that you are not allowed to interact with if they:

❑ Are inconsistent with the case that you use when you log on with your WebFOCUS WebFOCUS Reporting Server ID.

❑ Connect to different WebFOCUS WebFOCUS Reporting Servers, or to the same WebFOCUS WebFOCUS Reporting Server at different times with different WebFOCUS WebFOCUS Reporting Server user IDs.

The following image shows a sample Deferred Report Status window with three reports that have no options for interaction.
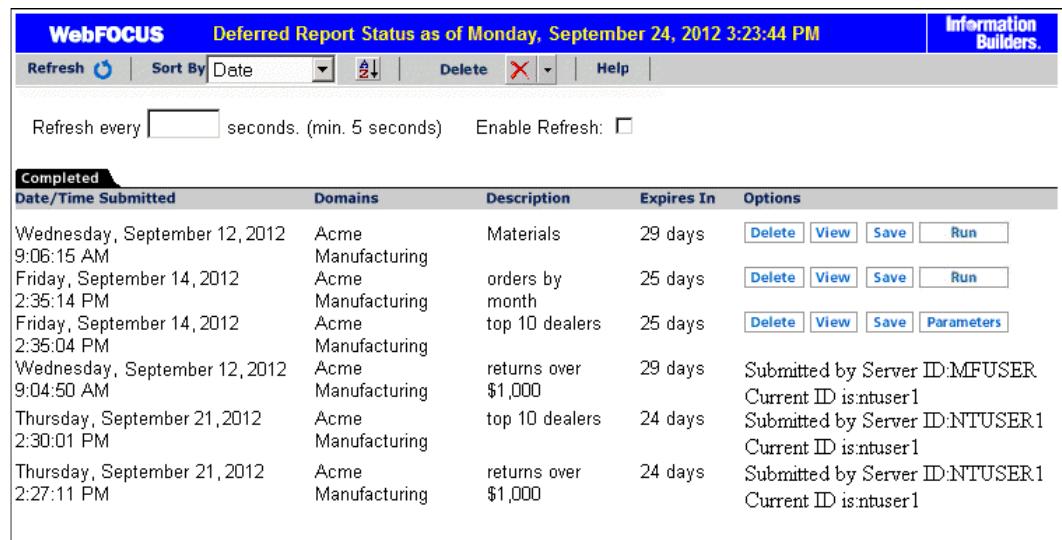
Setting the Automatic Refresh Interval

You can set the automatic refresh interval to any value. The default is 5 seconds and there is no maximum value.

Procedure: **How to Set the Automatic Refresh Interval**

1. Enter a time interval (in seconds) in the input box below the gray toolbar.

   The default value is 5 seconds. There is no maximum value.

2. Select the Enable Refresh check box to enable automatic refresh.

Viewing Deferred Reports

You must access the Deferred Report Status Interface to view deferred reports.

Procedure: **How to View a Deferred Status Report**

1. Open the Deferred Report Status Interface.

2. To view the output of a deferred report:

   a. Locate the report description under the Completed tab.

   b. Click *View*, under the Options column, to view the report.

      The output appears in a new window.

3. The Deferred Report Status Interface remains open until closed.

   a. To return to the Deferred Report Status Interface, close or minimize the report output window.

   b. To return to your reporting environment, close or minimize the report output window, then close the Deferred Report Status Interface.

4. Click *Refresh* to obtain the most current status of deferred requests.

Reviewing Deferred Report Parameters

The Deferred Report Status Interface enables you to retrieve parameters submitted with a deferred request. You access parameters by opening the Deferred Report Status Interface and clicking the parameters button for the report of your choice. The parameters button is not available when the deferred request is submitted from within a report development tool, such as InfoAssist.

You can also change the parameters associated with a report and submit the report to run deferred with the new parameters you specified. WebFOCUS generates your report again using the new parameters and does not overwrite your original report request. If the Custom Deferred Report Description feature is enabled, you are also prompted for a new deferred report description.

Procedure: **How to Retrieve Deferred Request Parameters**

1. Open the Deferred Report Status Interface.

2. In the Completed or Unknown tabs, identify the report containing the parameters to review.

3. Click *Parameter* under the Options column heading.

   The Parameters prompt window opens. If the Custom Deferred Report Description feature is enabled, the Deferred Report Description field displays in the Parameters prompt window.

   a. To review and accept the original parameters, close the browser window.

   b. To change the parameters, select a new value in the input box, type a new or updated description, and click *Run*.

      The Deferred Report Notification window opens.

      Note: The Deferred Report Submit Notification feature is enabled by default. To disable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Display Deferred Request Submitted Notification (IBI_DEFERRED_NOTIFY_SUBMITTED) setting to *False*.

4. Close the Deferred Report Notification window to return to the Deferred Report Status Interface.

Example: **Using Deferred Report Status Interface Options**

In the following example, you will manipulate a report called Current Salary Report that has been submitted as a deferred request. This example is based on a report developed using the Employee Master File and is intended to offer a practical demonstration of some of the options available in the Deferred Report Status Interface. You should note that an administrator can develop a similar file for training purposes.

1. Open the Deferred Report Status Interface.

2. Under the Completed tab, locate *Current Salary Report*, as shown in the following image.

3. Under the Options column heading, click *Parameters*.

   The Parameters prompt window opens. If the Custom Deferred Report Description feature is enabled, the Deferred Report Description field displays in the Parameters prompt window.

4. In the input box, select the *A17* value, type a new or updated description, and click *Run*.

   The Deferred Report Notification window opens confirming receipt of your request.

   Note: The Deferred Report Submit Notification feature is enabled by default. To disable this feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Display Deferred Request Submitted Notification (IBI_DEFERRED_NOTIFY_SUBMITTED) setting to *False*.

5. Close the Deferred Report Notification window to return to the Deferred Report Status Interface.

To view Current Salary Report:

1. Under the Completed tab, locate *Current Salary Report* again.

2. Click *View*.

   WebFOCUS displays Current Salary Report in a separate browser window, as shown in the following image.

EMP_ID	LAST_NAME	FIRST_NAME	CURR_SAL	EFFECT_DATE	JOBCODE
119329144	BANNING	JOHN	$29,700.00	83/01/01	A17
818692173	CROSS	BARBARA	$27,062.00	83/05/01	A17

3. Close the window to return to the Deferred Report Status Interface.

4. Under the Options column, click *Save*.

   WebFOCUS saves Current Salary Report to the Managed Reporting Repository as private content.

5. Close the Deferred Report Status Interface to return to your reporting environment.

Saving Deferred Reports

You can save Deferred Receipt reports to the WebFOCUS Repository, if your administrator has authorized you to save deferred reports. You can save the report output to your My Content folder or a folder you are authorized to create content in and write to. When your deferred report is saved to the WebFOCUS Repository, it is removed from the Deferred Report Status Interface. For more information on security privileges, see the *TIBCO WebFOCUS® Security Administration* manual.

Procedure: ## How to Save a Deferred Report

1. Open the Deferred Report Status Interface.

2. Under the Completed tab, locate the report you want to save.

3. Under the Options column, click *Save*, which is located to the right of the deferred report description.

   Note: Only users authorized to save deferred reports will see the Save button.

   The Save File Content dialog box opens.

4. Navigate to your My Content folder or another folder you are permitted to create content in and write to.

5. Click *Save* to save the deferred report results.

To return to your reporting environment, close the Deferred Report Status Interface.

Deleting Tickets for All Report Status Types

From the Deferred Status Interface, you can delete tickets for all report status types using the Delete drop-down list located in the toolbar at the top of the Interface. The drop-down list provides options to delete All, All Completed, All Running, All Queued, All Expired, and All Unknown reports, but only when one or more reports exist for that status type in the Deferred Status Interface. If a report status type is not displayed in the Interface, the corresponding status option does not appear in the Delete drop-down list.

You can also delete individual tickets using the Delete button, located in the Options column next to each report.

The following image shows the Deferred Status Interface with the Delete drop-down list expanded showing the available options.

For unknown tickets, the status column shows:

❑ *Expired* if the report has expired and is no longer stored on the WebFOCUS Reporting Server.

❑ *Unknown* for cases where the status cannot be determined, including situations where the server is not running so a connection could not be made to determine the status.

Note: For Unknown reports, the Options column displays the Server ID that submitted the report along with the Current ID.

Procedure: How to Delete Tickets for All Report Status Types

1. Open the Deferred Status Interface.

2. Click the down-arrow next to Delete and select one of the following from the drop-down list that opens:

   ❑ All

   ❑ All Completed

   ❑ All Running

   ❑ All Queued

   ❑ All Expired

❏ All Unknown

You are prompted to confirm the deletion.

3. Click *OK* to delete all tickets for the selected status type or click *Cancel* to cancel the request.

Deferred Status Delete Confirmation Messages

The Deferred Status Interface presents the user with a delete confirmation message before deleting a deferred report that is in Completed, Running, or Queued states. A confirmation message is already displayed for deferred reports in Unknown status.

Note: The deletion confirmation message is controlled by the IBI_Deferred_Ticket_Delete_Confirm setting, which you can configure in the Administration Console. To disable the deletion confirmation message feature, in the Administration Console, on the Configuration tab, expand the Application Settings folder. Then click *Deferred Reporting*, and set the Display Deferred Ticket Delete Confirmation (IBI_DEFERRED_TICKET_DELETE_CONFIRM) setting to *False*.

When you click the delete button from the Deferred Status page, you are prompted to confirm the delete before the deferred report is actually deleted. A similar confirmation message is used for all deferred reports, but the message varies depending on the conditions.

The following are the confirmation messages and the associated conditions:

❏ If the report is expired or was deleted from the server, the message recommends deletion and indicates that there is no report output on the specific WebFOCUS Reporting Server.

❏ If the WebFOCUS Reporting Server is unavailable, the message indicates there is an error attaching to the specific WebFOCUS Reporting Server.

❏ If there is no entry for the server in the WebFOCUS client configuration, the message recommends deletion and indicates that the specific WebFOCUS Reporting Server is not defined in the WebFOCUS client configuration file.

Each of the deletion confirmation messages also displays the date and time the deferred report was submitted, and the description that is displayed in the Deferred Status Interface.

Enhancing Portals Using Interactive Features and Coding Techniques

You can use interactive features and coding techniques that are available in WebFOCUS to customize your portal. These interactive features enable you to drill-down to specific data sets, exclude data from analysis, navigate to the precise point in your content, highlight critical information, as well as use coding techniques to override the default behavior.

This topic outlines how you can use interactive features and coding techniques to customize your portal.

In this chapter:

❏ Creating Filtered Dashboard Pages

❏ Using a JavaScript Function to Navigate to a Portal Page

❏ Advanced Coding Techniques and Coding Considerations

Creating Filtered Dashboard Pages

In Release 8.2 Version 01, WebFOCUS App Studio has a new Filter Panel option in the Requests & Data Sources tab, which lets you pick the Reporting Object and then streamlines the workflow for creating a filter panel to be used in a portal. This includes setting up a responsive layout with a single row of filter controls. It also sets the Load in iFrame Object property on the file to *No*, so that the portal creates an HTML DIV for the filter panel instead of an iFrame. This is important so that custom jQuery controls on the filter panel, such as the multi-select drop-down list and the calendar control, will be able to overlap the filter panel boundary.

An example of a filtered dashboard page, displayed on multiple devices, is shown in the following image.

To build a filtered dashboard page, you need to perform the following steps.

❏ **Step One.** Create a Reporting Object and populate it with parameters.

❏ **Step Two.** Create parameterized analytical content, such as a parameterized report, using the same Reporting Object.

❏ **Step Three.** Build filter controls in WebFOCUS App Studio.

❏ **Step Four.** Combine parameterized content and the filter panel in a responsive portal.

Step One: Creating a Parameterized Reporting Object

In this step, you create a Reporting Object and populate it with the Where statements that you will use for building a filter panel.

Procedure: **How to Create a Parameterized Reporting Object**

1. Create a Reporting Object using the wf_retail_lite Master File.

2. In the Reporting Object tool, right-click *Where Statements* and click *New*.

   The Create a filtering condition dialog box opens.

3. Create WHERE statements that you will use as parameters in a filter panel. In this example, we are creating the following five WHERE statements.

   ❏ Store,Business,Region Equal to Optional Static Parameter

   ❏ Product,Category Equal to Optional Multiselect Parameter

   ❏ Store Type Equal to Optional Static Parameter

   ❏ Sale,Date Greater than or equal to Optional Simple Parameter

   ❏ Sale,Date Less than or equal to Optional Simple Parameter

   Follow the steps below to create these.

   Store,Business,Region Equal to Optional Static Parameter

   a. Set the Field to *Store,Business,Region*, set the expression to *Equal to*, and set the Value to *Parameter*.

   b. Select the *Static* radio button, and then select the *Optional* check box.

   c. In the Value field, type *_FOC_NULL*, and click the *Add to List* button.

   d. Click *Get Values* and then click *All*.

   e. Multi-select all values and click the *Add to List* button.

   f. Click *OK*.

   Product,Category Equal to Optional Multiselect Parameter

   a. Click *New Filter*.

   b. Set the Field to *Product,Category*, set the expression to *Equal To*, and set the Value to *Parameter*.

   c. Select the *Dynamic* radio button, and then select the *Optional* check box.

   d. Select the *Select multiple values at runtime* check box.

   e. Click *OK*.

   Store Type Equal to Optional Static Parameter

   a. Click *New Filter*.

   b. Set the Field to *Store,Type*, set the expression to *Equal To*, and set the Value to *Parameter*.

   c. Select the *Static* radio button, and then select the *Optional* check box.

   d. In the Value field, type *_FOC_NULL*, and click the *Add to List* button.

   e. Click *Get Values* and then click *All*.

f.   Multi-select all values and click the *Add to List* button.

g.   Click *OK*.

Sale,Date Greater than or equal to Optional Simple Parameter

a.   Click *New Filter*.

b.   Set the Field to *Sale,Date*, set the expression to *Greater than or equal to*, and set the Value to *Parameter*.

c.   Select the *Simple* radio button, and then select the *Optional* check box.

d.   Click *OK*.

Sale,Date Less than or equal to Optional Simple Parameter

a.   Click *New Filter*.

b.   Set the Field to *Sale,Date*, set the expression to *Less than or equal to*, and set the Value to *Parameter*.

c.   Select the *Simple* radio button, and then select the *Optional* check box.

d.   Click *OK*.

The following image shows the completed WHERE statements.
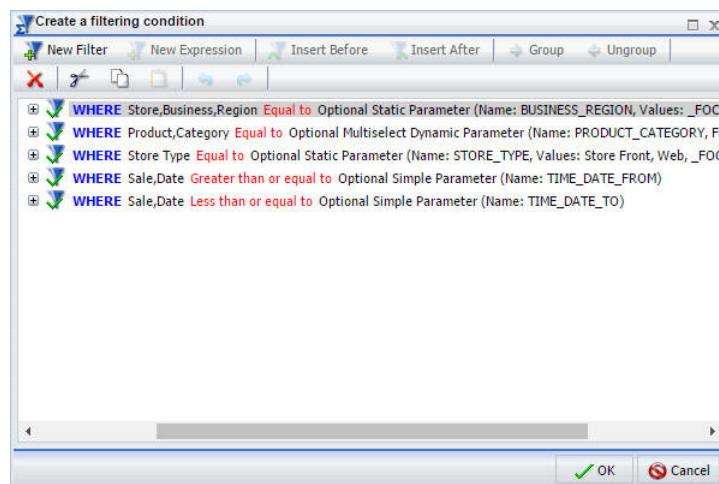
4.   Click *OK* to close the Create filtering condition dialog box.

5.   Save and close the Reporting Object tool.

Step Two: Creating Parameterized Content Using a Reporting Object

In this step, you use your newly created Reporting Object to generate analytical content. This procedure provides a fast and easy way to ensure the uniformity of the parameters used across the content.

Procedure: **How to Create Content Using a Reporting Object**

1. Edit the Reporting Object that you created in the previous step, by creating a new report or chart.

   InfoAssist opens. The Master File that you used to build your reporting object is automatically selected.

2. Drag fields of your choice from the Data pane to the Query pane to build a report or chart.

3. Save your item and close InfoAssist.

   Note: Repeat these steps to create more content.

Step Three: Building Filter Controls

In this step, you create an HTML document with the filter controls that can be used to filter content on a page.

Procedure: **How to Build Filter Controls in WebFOCUS App Studio**

1. Launch WebFOCUS WebFOCUS App Studio.

2. In the Environments tree, right-click a domain or folder, point to *New*, and then click *HTML/Document*.

   The HTML/Document Wizard opens.

3. Click *Next*.

   The Templates, Settings, and Themes screen appears.

4. Keep the default settings and click *Finish*.

5. In the Requests & Data Sources panel, click the arrow next to the *New* button, and then click *Requests->Parameters->Filter Panel*.

   The Open File dialog box opens.

6. Navigate to the reporting object that you created in Step 1 and click *OK*.

The New Parameters dialog box opens, as shown in the following image.
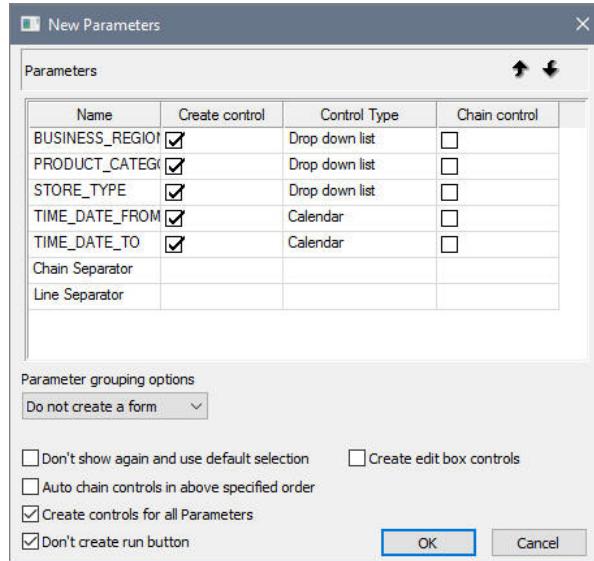
7. Right-click the control type for the STORE_TYPE field and select *Radio Button* from the list of options.

8. Keep the remaining default options and click *OK*.

    The filter controls appear in the HTML canvas.

9. Perform the following actions to visually streamline the controls:

    a. Multi-select two date fields, right-click either one of them, point to *Html object manipulation*, and then click *Merge containers*.

    b. Change *_FOC_NULL* to *All* wherever applicable. To do so, select a control, open the Settings panel, double-click the Display value and modify the entry.

    c. Optionally, edit the titles of the controls. To do so, double-click the title of a control and modify the entry.

        An example of completed filter controls is shown in the following image.

10. In the Tasks & Animations panel, under Tasks, click the *New* button.

11. From the Trigger Type drop-down list, select *Selection Changed*.

12. In the Trigger Identifier field, select check boxes next to all controls.

13. In the Requests/Actions section, click the arrow next to the *Requests Selections* button, and then click *Refresh*.

    The Target type automatically changes to *Refresh BI Portal* and the *Current page only* radio button is automatically selected.

14. Save the page and close WebFOCUS App Studio.

Step Four: Combining the Filter Panel and the Content

In this step, you build a responsive portal page and add your new filter panel to create a filtered dashboard.

Procedure: How to Use a Filter Panel in a Portal

1. Create a new basic or collaborative portal and build a responsive portal page.

2. Add your new filter panel to the responsive portal page, as described in *Building a Basic Responsive Portal* on page 111.

3. Once you finished customizing your filtered dashboard page, click Save and close the Portal Designer.

4. Run the portal.

   The completed filtered dashboard page at run time is shown in the following image.
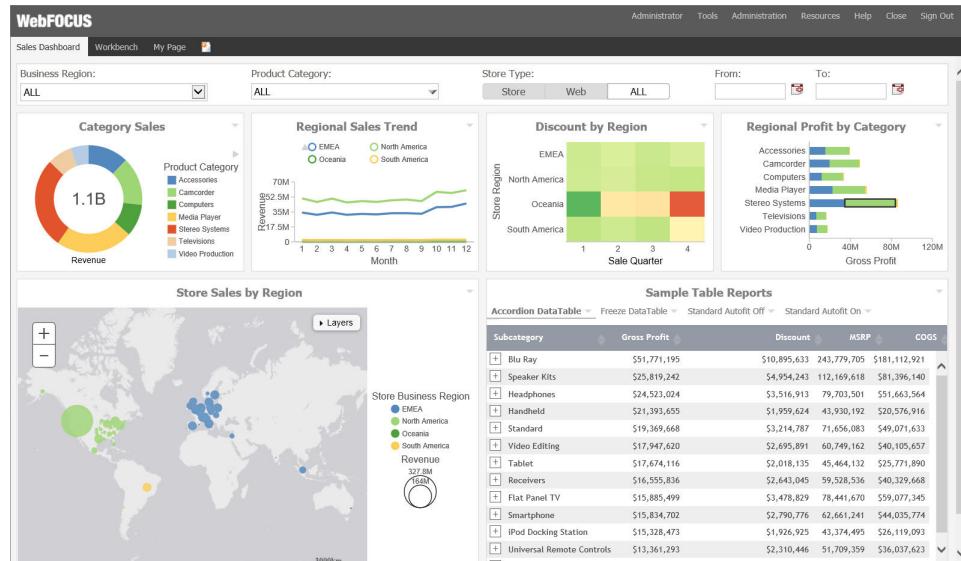
5. Manipulate the filter controls to see the content refresh, change the browser width to observe the responsive behavior.

6. Optionally, publish your portal to make it available to other users and groups.

Using a JavaScript Function to Navigate to a Portal Page

You can use a JavaScript function to dynamically navigate to portal pages and reports within your portal. This feature is especially useful in portals with multiple portal pages, because it allows you to link to a specific item or point in your content. You can also pass a parameter from a link to its output, such as a chart or report.

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

1. **Create Hyperlinks in a Report.** Create hyperlinks within a report, which you will later configure to point to a page and parameterized content.

2. **Create Parameterized Content.** Create charts and reports to which the links will point.

3. **Set Up a Portal for the Navigate to Page Function.** Create the landing page for the links.

4. **Configure Hyperlinks.** Specify the output location for the links.

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*.

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 *TIBCO WebFOCUS® InfoAssist User's Manual*.

5. Click the field that you want to use for the Navigate to Page 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. From the Refresh list, click *All Pages*.

9. Click the *Add Parameter* button.

10. Type a name for the parameter.

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

11. In the Type list, click *Field*.

12. 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 *Country* is the name of the parameter.
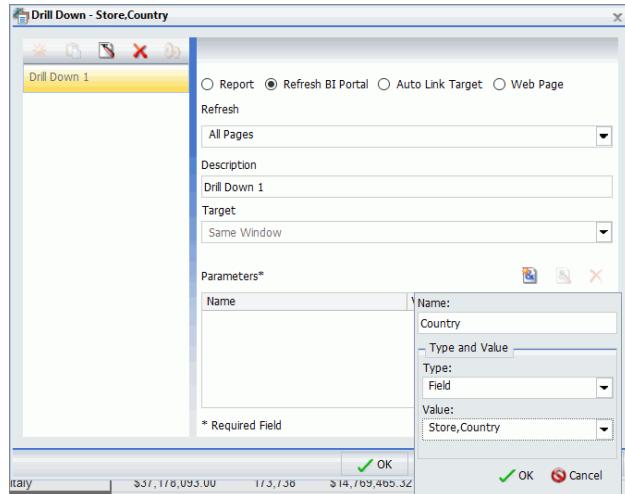
13. Click *OK*.

    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.

14. Save the report.

Step Two: Creating Parameterized Content

In this step, you build parameterized reports and charts that will serve as outputs for your links.

Procedure: How to Create Parameterized Content for Hyperlinks

1. From InfoAssist, click the application button, then click *New*.

   Click *Build a Report*.

2. Select the same data source file that you used for the initial report, and then click *OK*.

3. Drag fields from the Data pane onto the canvas or into the Query pane to create a report.

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

   The Create a filtering condition dialog box opens.

5. Double-click the *Double-click or press F2 to edit!* text.

6. 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 *Country* is the name of the parameter.
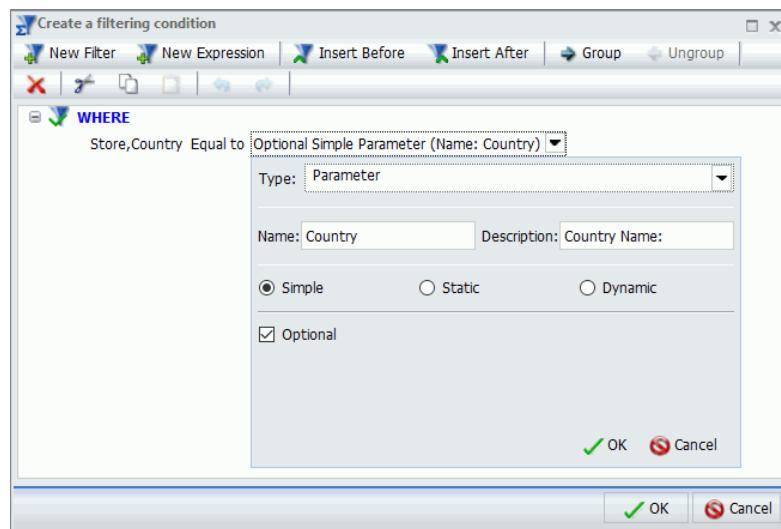
7. Click *OK*.

8. Save the second report and close WebFOCUS InfoAssist.

9. Repeat steps 1-8 to create more content.

Step Three: Setting Up a Portal for the Hyperlinks

In this step, you will create a landing page for the hyperlinks and incorporate the report that you created in Step Two, to a Portal.

Procedure: How to Set Up a Portal for the Hyperlinks

1. Create a new basic or collaborative portal.

2. In the Portal Designer, create a new page and note the Page Name value.

   Note: In a collaborative portal, the Page Name value is displayed in the Add Page window. In a basic portal the Page Name value is displayed in the Properties panel. You can also see the Page Name value in if you hover over any portal in the Resources tree.

3. Right-click the page canvas, and then click *Page Layout*.

   The Choose a Layout dialog box opens.

4. Select the layout type for your page.

   In this example, we select Two Column layout.

5. Click the first column.

6. On the *Insert* tab, in the *Containers* group, click *Panel*.

   A Panel container is inserted inside the first column.

7. Click the container to select it.

8. In the Properties panel, on the Content tab, view and remember the value of the WebFOCUS Resources field. This value will be used in the subsequent steps.

9. Repeat steps 6-8 for the other columns.

10. On the *Insert* tab, in the *Content* group, click *WebFOCUS Resources*.

    The Resources tree opens.

11. Drag the report with hyperlinks to the Page 1 canvas.

12. Drag the remaining content to the panels on Page 2.

Step Four: Configuring Hyperlinks

In this step, you edit the report containing hyperlinks to specify the output location.

Procedure: **How to Configure Hyperlinks**

1. Open the initial report in the Text Editor.

2. Navigate to the line that contains the following code: *JAVASCRIPT=drillRefresh*.

3. Change drillRefresh to navigateToPage, change AMPERS_PORTAL to the name of the landing page, and specify names of the panels, separated by spaces. Ensure that you enclose these entries in single quotation marks.

   An example of modified syntax should look similar to this:

```
JAVASCRIPT=navigateToPage('page1' 'panel1 panel2' 'Country'
WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME)
```

where:

navigateToPage

Is the JavaScript function.

page1

Is the name of the landing page.

Note: This value is case sensitive. You can only have one landing page.

panel1 panel2

Are the names of the panels with parameterized content.

Country

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

Note: The panels added to this syntax will be refreshed once you click the hyperlink. This behavior can be changed at any time by adding panel names to or removing them from this syntax. This allows you to choose which content gets refreshed on the landing page.

WF_RETAIL_LITE.WF_RETAIL_GEOGRAPHY_STORE.COUNTRY_NAME

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

The following image shows an example of modified syntax.

4. Click *Save* and close the Text Editor.

5. Optionally, customize your portal to achieve the desired style and layout.

6. Click the *Save* button and close the Portal Designer.

7. Run your new portal.

8. At run time, click any link on the first page of the portal.

   The second portal page displays, and the content refreshes to show the correct data.

   Note: If you navigate to a portal page that has changed, you will not receive an error message, and must ensure that your syntax values are set correctly.

The following images show the Navigate to Page function at run time.

Advanced Coding Techniques and Coding Considerations

This section describes how to use the -INCLUDE command to insert a report procedure (FEX) or style sheet file (STY) within another report procedure (FEX). It also describes how to use the -MRNOEDIT command to ignore code in a procedure (FOCEXEC).

Execution of a Report Procedure or Style Sheet File Using -INCLUDE

Using the -INCLUDE command, you can insert a report procedure (FEX) or style sheet file (STY) within another report procedure (FEX). For information on creating report requests and creating style sheet files, see the *Creating Reports with TIBCO WebFOCUS® Language* manual.

When you create a report procedure in the repository content folder path, a unique path and file name reference is created, based on the folder the report is created in and the file name and type specified. Note that there are file naming rules that replace most non-alphanumeric characters and modify the file name, when necessary.

The full path is the value to specify when referencing a report procedure or style sheet file in a -INCLUDE command. The full IBFS path information, including file name, can be obtained by selecting the report and then selecting the *Properties* option. If the report procedure (FEX) or StyleSheet file (STY) referenced by the -INCLUDE command is contained in the same folder, you can substitute the full path name with the term ./ followed by the file name. For example:

```
-INCLUDE ./setup_headings.fex
```

Note: WebFOCUS 7.x report procedures migrated with -INCLUDE commands, coded with the 7.x Managed Reporting Repository Internal HREFs, are supported in WebFOCUS 8. This is because the WebFOCUS 7.x internal HREF references are migrated with the properties information for an item (for example, a report or style sheet file). Items created in WebFOCUS 8 must be referenced by their full IBFS path.

The following image shows the Properties dialog box for a report procedure (FEX) with the full path.
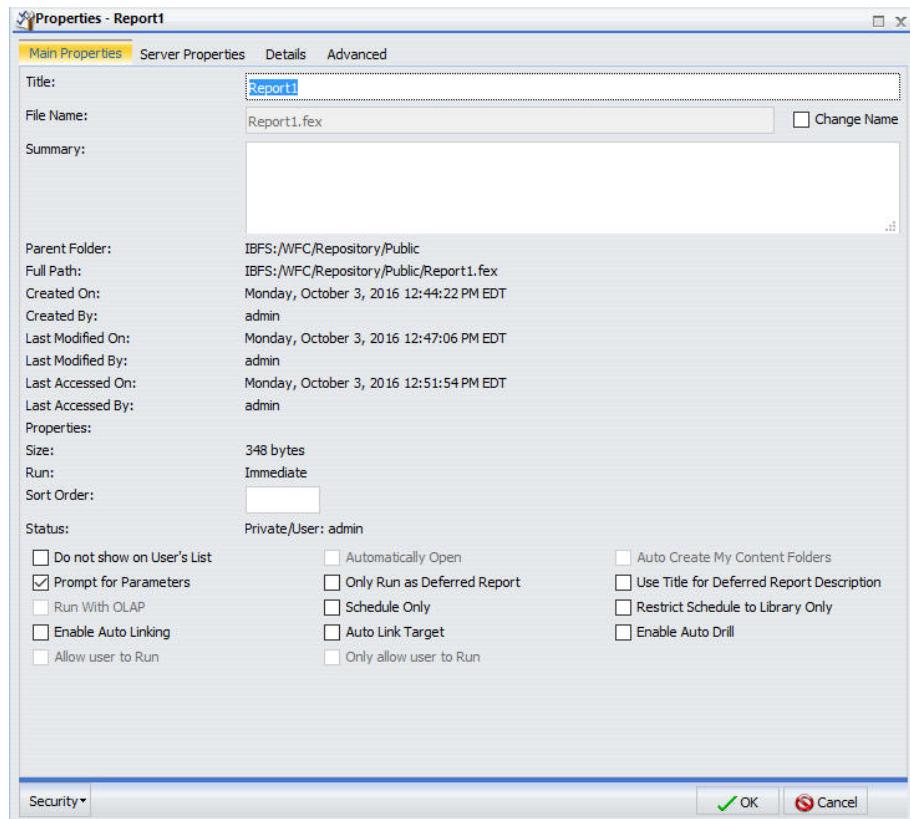
Syntax: How to Incorporate a Report Procedure (FEX) or Style Sheet File (STY) With -INCLUDE

The following code illustrates how to incorporate a report procedure (FEX) using IBFS path with -INCLUDE command.

Note: A procedure or style sheet file that is located on a WebFOCUS Reporting Server can be incorporated into a Managed Reporting procedure using the -MRNOEDIT command prior to the -INCLUDE command.

```
-INCLUDE IBFS:/path/filename
```

where:

```
IBFS:/path/filename
```

Is the full path, including filename, of the report procedure (FEX) or filename.sty of the style sheet file. The file extension is optional when a report procedure (FEX) is referenced.

If the report procedure (FEX) or StyleSheet file (STY) referenced by the -INCLUDE command is contained in the same folder, you can substitute the full path name with the term ./ followed by the file name. For example:

```
-INCLUDE ./setup_headings.fex
```

To incorporate a procedure on a WebFOCUS Reporting Server using -MRNOEDIT and -INCLUDE, enter the following:

```
-MRNOEDIT -INCLUDE appname/filename.ext
```

where:

```
appname
```

Is the application directory path on the WebFOCUS Reporting Server in which the server procedure (FEX) or style sheet file (STY) is located. If this is not specified, the file must be on the application path of the WebFOCUS Reporting Server.

```
filename.ext
```

Is the name of the procedure located on the WebFOCUS Reporting Server. The file extension is optional when a report procedure (FEX) is referenced. When incorporating a style sheet file, specify the STY extension.

Reference: **Including a WebFOCUS Reporting Server Procedure or Style Sheet File in a Managed Reporting Procedure Using an IBFS Path**

To incorporate a procedure located in an application directory on a WebFOCUS Reporting Server using the WebFOCUS IBFS path, enter:

```
-INCLUDE IBFS://EDA/nodename/appname/filename.ext
```

where:

nodename

> Is the WebFOCUS Reporting Server node defined in the WebFOCUS Client configuration. The IBFS://EDA/ path specifies that the procedure or style sheet file is located on a WebFOCUS Reporting Server. Managing Reporting processing removes IBFS://EDA/ *nodename* from the Managed Reporting request when submitting the request to the WebFOCUS Reporting Server because the WebFOCUS Reporting Server processing will use its application path to locate the procedure or style sheet file.

appname

> Is the application directory on the WebFOCUS Reporting Server in which the server procedure or style sheet file is located. If this is not specified, the file must be on the application path of the WebFOCUS Reporting Server.

filename.ext

> Is the name of the procedure or style sheet file located on the WebFOCUS Reporting Server. The file extension is optional when a report procedure (FEX) is referenced. When incorporating a style sheet file, specify the STY extension.

Reference: **How to Include a WebFOCUS Reporting Server Procedure or Style Sheet File in a Managed Reporting Procedure Using -MRNOEDIT and -INCLUDE**

A best practice in WebFOCUS 8 application development is to centralize report styling and environmental setup, such as JOINs and DEFINEs, by storing them in a common workspace and defining security permissions to permit users to read and run them, but not edit or change them. However, applications may require referencing report procedures and style sheet files that are located in an application directory on the WebFOCUS Reporting Server. The information in this section is for legacy applications that have been migrated.

The following is an example of incorporating a WebFOCUS Reporting Server procedure or a style sheet file within a Managed Reporting procedure using the -MRNOEDIT and -INCLUDE command.

The salesrptsetup procedure, containing the following commands to create a field commonly used in the product sales reports, is located in the /ibi/apps/ibisamp directory on the WebFOCUS Reporting Server.

```
DEFINE FILE GGSALES
PROFIT/D12.3= DOLLARS - BUDDOLLARS;
INVENTORY/D12 = UNITS - BUDUNITS;
END
```

The salesrptstyle.sty style sheet containing the following styling commands, is located on the WebFOCUS Reporting Server in the /ibi/apps/ibisamp directory.

```
TYPE=REPORT,COLOR=NAVY,FONT='ARIAL',SIZE=9,GRID=OFF,$
TYPE=HEADING,LINE=1,STYLE=BOLD,SIZE=12,JUSTIFY=CENTER,$
TYPE=TITLE,BACKCOLOR=RGB(45 111 205),COLOR=WHITE,STYLE=UNDERLINE+BOLD, $
TYPE=DATA,BACKCOLOR=(WHITE RGB(235 235 255)),$
TYPE=SUBTOTAL,BACKCOLOR=RGB(163 200 236),STYLE=BOLD,$
```

The Managed Reporting procedure incorporates the salesrptsetup procedure and salesrptstyle style sheet located on the WebFOCUS Reporting Server.

```
-MRNOEDIT -INCLUDE ibisamp/salesrptsetup
TABLE FILE GGSALES
"Regional Inventory and Profit Report"
SUM BUDUNITS UNITS INVENTORY AS 'Inventory'
BUDDOLLARS DOLLARS PROFIT AS 'Profit'
BY REGION
BY CATEGORY
ON TABLE SET STYLE *
-MRNOEDIT -INCLUDE ibisamp/salesrptstyle.sty
ENDSTYLE
END
```

WebFOCUS Report - Windows Internet Explorer

PAGE 1

Regional Budget and Sales Report

Region	Category	Budget Units	Unit Sales	Inventory	Budget Dollars	Dollar Sales	Profit
Midwest	Coffee	335526	332777	-2,749	4086032	4178513	92,481.000
	Food	339263	341414	2,151	4220721	4338271	117,550.000
	Gifts	232318	230854	-1,464	2887620	2883881	-3,739.000
Northeast	Coffee	335920	335778	-142	4252462	4164017	-88,445.000
	Food	351431	353368	1,937	4453907	4379994	-73,913.000
	Gifts	227008	227529	521	2870552	2848289	-22,263.000
Southeast	Coffee	355693	350948	-4,745	4431429	4415408	-16,021.000
	Food	351509	349829	-1,680	4409288	4308731	-100,557.000
	Gifts	235045	234455	-590	2967254	2986240	18,986.000
West	Coffee	358784	356763	-2,021	4523963	4473517	-50,446.000
	Food	335361	340234	4,873	4183244	4202337	19,093.000
	Gifts	236636	235042	-1,594	2934306	2977092	42,786.000

Reference: **Considerations When Using -INCLUDE With ReportCaster**

From the WebFOCUS Reporting Server, for each task within a schedule, ReportCaster supports receiving a single answer set, such as report, chart, or HTML file. Therefore, when using -INCLUDE to incorporate a procedure into a procedure that will be scheduled with ReportCaster, only one answer set should be created. If you need to distribute multiple reports within a single document, use the Compound Report feature. For more information, see the *Creating Reports With TIBCO WebFOCUS® Language* manual.

Ignoring Code in a Procedure (FEX)

You can instruct Managed Reporting to not process single lines or blocks of code using the -MRNOEDIT tag.

Syntax: **How to Ignore Code in a Procedure (FOCEXEC)**

To instruct Managed Reporting to not process code, use the following:

For a single line of code:

```
-MRNOEDIT focexec_code
```

For multiple lines of code:

```
-MRNOEDIT BEGINfocexec_code
-MRNOEDIT END
```

Note: Both lowercase and uppercase syntax are supported for the -MRNOEDIT tag. The *focexec_code* must fit on the same line.

The syntax above is not part of the FOCUS language. It is used only by Managed Reporting.

Managed Reporting will not process the lines when evaluating the Managed Reporting procedure prior to sending it to the WebFOCUS Reporting Server. The lines of code will be passed without the -MRNOEDIT tags to the WebFOCUS Reporting Server.

By design, amper variables specified within the -MRNOEDIT tags are resolved by Managed Reporting. You should clear the procedure property, *Prompt for Parameters*, if you do not want to be prompted for parameter values when:

❏ Running a procedure immediately.

❏ Running a procedure deferred.

❏ Scheduling a procedure.

You must also set the *Managed Reporting when Prompt Parameters Property Unset* to Off. For more information, see the *TIBCO WebFOCUS® Security and Administration* manual.

Reference: **Using -MRNOEDIT to Instruct Managed Reporting to Ignore Lines of Code**

Both lowercase and uppercase syntax are supported for the -MRNOEDIT tag.

```
-MRNOEDIT -INCLUDE salesrptstyle.sty
```

Managed Reporting ignores the -INCLUDE salesrptstyle.sty command. Without the -MRNOEDIT tag, this would result in retrieval of the FOCEXEC from the WebFOCUS Repository. In this case, the -INCLUDE is resolved on the WebFOCUS Reporting Server. Therefore, salesrptstyle.sty should reside on the path of the WebFOCUS Reporting Server.

```
TABLE FILE GGSALES
"Regional Inventory and Profit Report"
SUM BUDUNITS UNITS INVENTORY AS 'Inventory'
BUDDOLLARS DOLLARS PROFIT AS 'Profit'
BY REGION
BY CATEGORY
ON TABLE SET STYLE *
-MRNOEDIT -INCLUDE salesrptstyle.sty
ENDSTYLE
END
```

Glossary

Accessibility

Ensures product accessibility to all potential users, including individuals with disabilities, and maintains TIBCO compliance with Federal regulations.

Accordion

A compound container that can hold one or more pieces of content.

Administration Console

Area where you configure, administer, and monitor the components of a WebFOCUS application.

Alert

An event that is prompted by a guideline that you define. For example, you may want to be notified if a sale over $1 million is entered.

Alert Procedure

A report procedure that evaluates whether a defined condition is true or a file exists, in order to determine whether to run (trigger) the specified or referenced report request.

Banner

An area that is visible in the portal, no matter what page you are on.

Business Intelligence (BI) Portal

You can use the BI Portal to build complete, modern websites.

Canvas

The design area, which includes the banners and pages of your portal.

Container

Holds the page content. The following types of containers exist in the BI Portal: Panel, Accordion, and Tabbed.

Distribution List

Used with a ReportCaster schedule (Email, FTP, or Printer) to specify the email addresses, directory locations, or printers to distribute content. A Distribution List is an easy way to distribute content to multiple recipients or destinations. The list, which is stored in the WebFOCUS repository, contains a previously specified group of individual recipients. The Distribution List automates distribution to this stored list, rather than requiring the entry of each recipient individually into a schedule.

Folder

Allows the user to organize their private or published application content.

Graph Procedure

Contains the core language commands to tell the WebFOCUS Reporting Server how to create the graph.

Join

Enables the merging and use of data from multiple data sources. If a report requires data from two or more related data sources, you can temporarily join the files and report from them, as if they were one. Joined files remain physically separate, but are treated as one data source structure.

Library Access List

Used with a ReportCaster Library schedule to specify the groups and users that the private Library report will be shared with. A Library Access List defines the groups and users that are authorized to view report output distributed by a schedule to the Report Library. A Library Access List can be used with single or multiple schedules.

Manager Mode

Enables you to manage the content of other users. Typically, you can switch between Normal mode (seeing your own content) and Manager mode, provided you have those privileges.

Menu Bar	Located in the upper-right section of the screen by default, inside the top banner. You can use this tool to perform tasks such as changing a password, enabling accessibility, and various administrative tasks.
My Content folder	Created when the parent folder has the Auto create My Reports folder property selected, and the user is permitted to create private content in a My Content folder. This folder contains content specific to you.
Node	An area or a folder in the Resources tree, such as workspaces or Favorites.
Normal Mode	The mode where you can see your own content.
Panel	A simple container that can hold a single piece of content.
Portal	A custom page, or group of pages, that you create to display timely information (components). A portal can be comprised of as many pages as you would like. Various components display around your portal, including a menu bar, a navigation area, and a banner.
ReportCaster Explorer	The ReportCaster Explorer interface provides users with the ability to obtain a list of ReportCaster items, by type, displayed with detail column information specific to the item type selected. In BI Portal, you can use the ReportCaster Explorer to view ReportCaster content.
Report Component	Creates a report template and saves it in a Reporting Object.

Report Procedure

Also known as a FOCEXEC (FEX), a reporting procedure contains the core language commands that tell the WebFOCUS Reporting Server how to create the report.

Reporting Objects

Report templates containing the data source fields that users can select in the InfoAssist reporting tool to build a report or chart.

Resources Tree

Located on the left side of the page, upon initial entry into WebFOCUS. In the Portal, the Resources tree is located on the right side of the page. It contains your WebFOCUS resources, such as workspaces and Portals.

Ribbon

A navigational area of the interface in Developer mode that provides access to commonly used tools. The ribbon replaces traditional toolbars with a single, rectangular region that spans the width of the application window. There are three menu options above the ribbon: Layout, Insert, and Style.

ROI

Return on investment (ROI) is used to determine how well a particular investment is performing. It is typical to compare one investment against any number of investments to evaluate the effectiveness of the return or gain on the primary investment.

Schedule

Specifies when to run a report procedure, how to distribute the report (Email, FTP, Managed Reporting, Report Library, or Printer), and the destination to which the report will be distributed.

Security Center

Area of the application where you define users and groups and grant access permissions.

Selection Criteria	Also known as WHERE statements, selection criteria restrict the data retrieved to only those records that meet the conditions that you specify.
Shared Folder	A folder containing private content that is accessible by users with the proper permissions. The shared folder can also be shared with specific groups or users.
Shared Reports Procedure	A folder that contains shared report procedures to which a user can give access to all users or a specific group of users. A user or group must have the proper permissions to access the folder in which the shared report resides.
Stylesheet File	Specifies how to apply WebFOCUS styling to a report or chart created by the WebFOCUS Reporting Server.
Tabbed	A compound container that has the same properties as an accordion container, however, it presents differently. All of the titles for the tabs are in the same horizontal location. If there is not enough space to show all of the tabs in the container, a scroll bar is presented.
Text Editor	Enables you to create, view, and edit the source code for procedures, procedure components, Master Files and Access Files, and other types of files required by your applications.
Tree	A set of folders or navigational groups presented in a list. These are typically presented on the right or left side of the canvas, and serve to aid in navigation specific to storing or accessing files.
URL	A URL (Uniform Resource Locator) is a link to a website.

Virtual Field

A field whose value is not stored in the data source, but can be calculated from the data that is there. A virtual field takes up no storage space and is created only when a user accesses the Reporting Object that includes the virtual field.

Watch List Report

A report of particular interest that the user subscribes to in the Report Library. Each time a new version of the report is distributed, the user receives an email notification.

Web-Based Tools

A set of applications and utilities available through the BI Portal that enable you to perform many development and deployment tasks.

WebFOCUS

WebFOCUS is a comprehensive BI platform, helping organizations deliver information and analytics to the widest range of users. WebFOCUS 8 delivers many rich new capabilities and integrates the four critical elements for smarter decision-making: business intelligence, performance management, advanced analytics, and data integrity.

Workspace

Provides data on a particular topic, such as Sales, or to isolate specific users utilized in SaaS and Multi-tenancy deployments. Workspaces contain all of the components that you can create with WebFOCUS.

Workspace Folder

The highest level of folder organization for Managed Reporting.

Legal and Third-Party Notices

Index

O

Other component *251*, *264*

P

Page Designer *104*

page templates *66*

pages *80*

    managing *102*

panels *84*

parameters *245*

    prompting for *245*

Portal Designer

    background images *74*

    background styling *74*

    borders *75*

    canvas *77*

    components *65*

    fonts *76*

    inserting content *73*

    Layout tab *71*

    page layout *73*

    Properties panel *73*

    ribbon *71*

    styles *74*

Portal Tree *96*

portals

    architecture *58*

    containers *60*

    customizing *97*

    localizing *127*

portals

    page layout *59*

    properties *77*

private content folder options *22*

published content *22*, *271*

publishing *20*

R

refresh options *276*

report

    component *262*, *263*

    deferred *268*

    templates *262*, *263*

ReportCaster Alerts

    scheduling *236*

    tracking *236*

Reporting Objects *22*, *244*, *245*

    folders *244*

    join structures *255*

    OLAP-enabled *245*

    running *249*

    selection criteria *244*

    templates *262*, *263*

reports folder options *22*

Resources tree *14*, *94*

responsive portals *111*

    building with percentages *112*, *115*

reviewing parameters *276*, *277*