WebFOCUS Newsletter

Information Builders

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Getting Started: WebFOCUS Open Portal Services Integration With SharePoint Server 2010

By Gil Rodriguez

In WebFOCUS Version 7 Release 7.02, WebFOCUS Open Portal Services will support integration with SharePoint Server 2010. In this article, I will briefly describe how to get started and configure your SharePoint Server 2010 Site and Pages, and quickly upload and integrate our set of WebFOCUS components, also known as "Web Parts."

Before publishing the WebFOCUS Web Parts, you must perform the following steps:

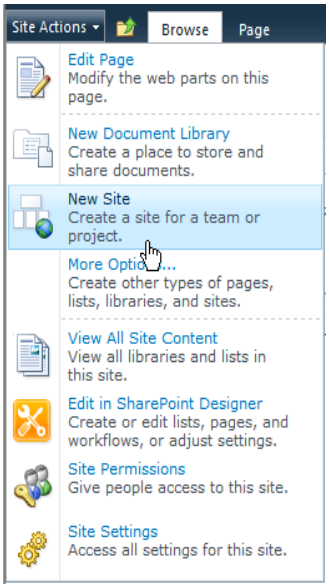
Deploy the `WOAS_Cab.CAB` file on the SharePoint Portal Server 2010
From WebFOCUS Administration Console -> Configuration-> Portal, change the `USE_GATEWAY` parameter value to `NO` and the optional parameter settings for `RESTRICT_WOAS_TO_IP` and `PORTAL_SIGNON_TRIM_WINDOWS_DOMAIN`

For more information, see the WebFOCUS Open Portal Services Administration Guide.

Now, let's get started.

Step 1: Creating a Site

Log in to SharePoint 2010.
Click Site Actions, and then click New Site (See Screen 1).
Click on Team Site, provide the name and URL, and then click Create.



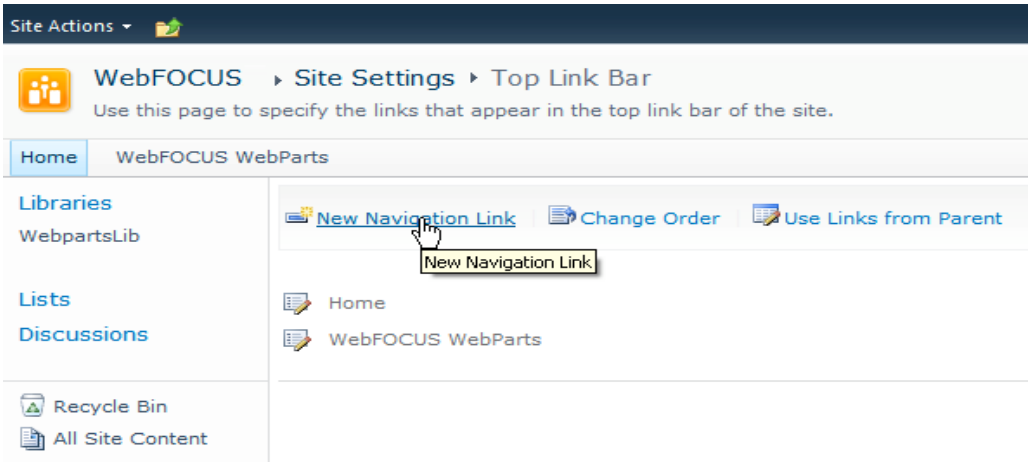
Screen 1

Step 2: Creating a Page

Click Site Actions, and then click on New Page.
Provide a New Page Name.
Click Create.
Click on Save & Close from the Ribbon.

Step 3: Adding Page to Site Navigation Top Link Bar

Click Site Actions, and then click on Site Settings.
From the Look and Feel links, click on Top Link Bar.
Click on New Navigation Link (See Screen 2).
Type the Page URL and description. You can obtain the page URL by clicking on Site Pages and then clicking on the Page you created in Step 2.
Click OK.



Screen 2

Step 4: Adding Web Parts to a Group in a Web Part Gallery

You can add a Web Part to a page without uploading it to the Web Part Gallery. This is achieved using the Ribbon to add a new Web Part to a page. When the Web Part gallery shows up in the interface you can click *Upload a Web Part* under the Categories list.

This Web Part will appear in the *Imported Web Parts* category and can then be added to the page. This uploaded Web Part configuration is available only "temporarily" in the gallery to the user editing the specific page and will not be available once you exit the edit mode. Adding the Web Parts to a Group in Web Part Gallery will keep the Web Parts organized and always available from the Categories list under the Group Name specified.

Here are the steps:

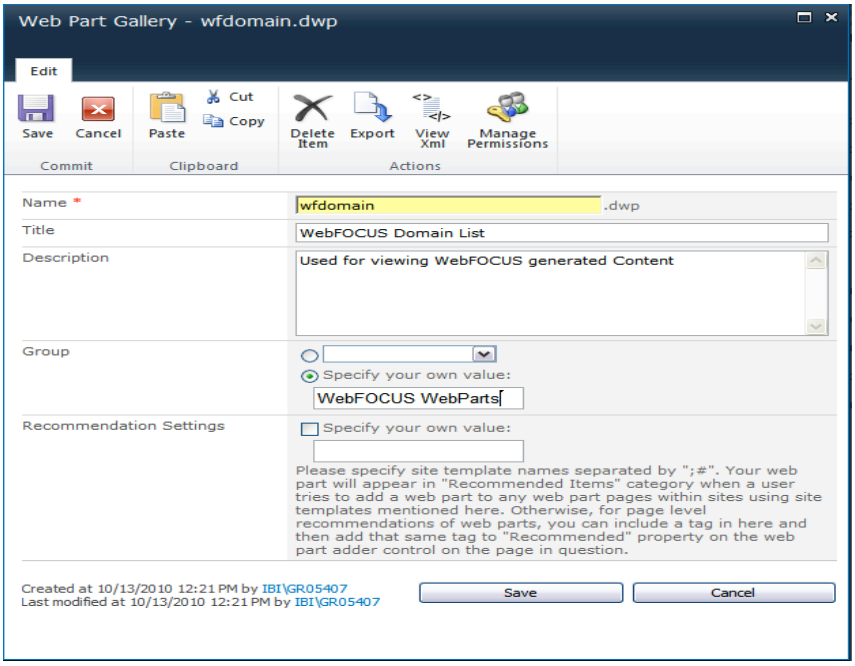
Navigate to the Top Level Home Site
Click Site Actions, and then click on Site Settings.
From the Galleries Group, click on Web Parts.

From Library Tools, click on Documents. From the Ribbon, click on Upload Document.
Click on Browse to upload the Web Part. Browse to where WebFOCUS is installed: the `\ibi\WebFOCUS77\worp\components\webparts2` directory.

Note: The *.dwp* Web Part files under the `.\ibi\WebFOCUS77\worp\components\webparts2` directory can be edited with the WebFOCUS client hostname, port and context path prior to being uploaded.

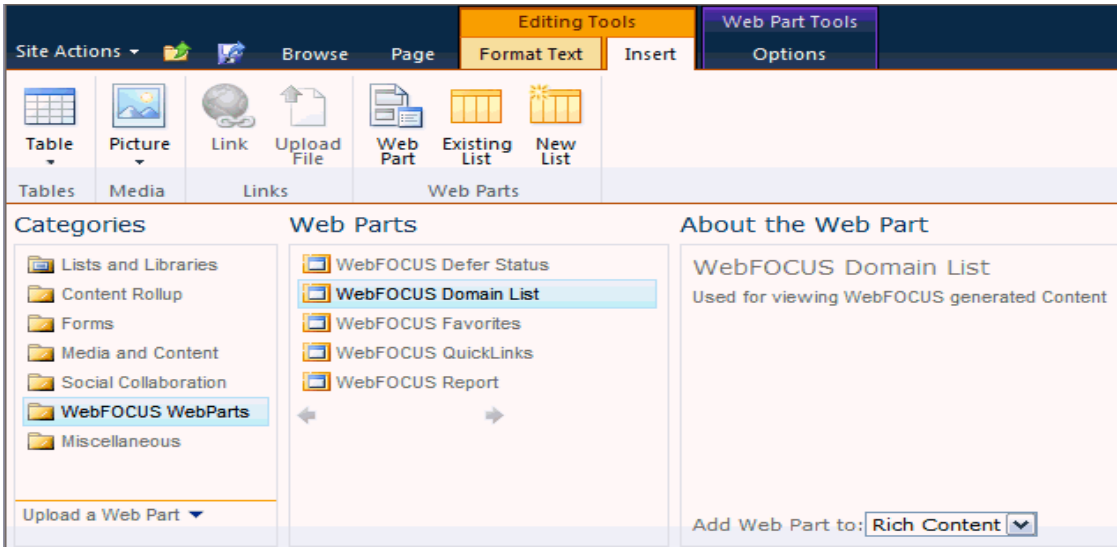
Select one of the five available SharePoint WebFOCUS Web Parts (Domains, Report, Favorites, Defer Status and Quicklinks).
For Group, Select the "Specify your own value" radio button. Type a Group Name, as you see in Screen 3.

Note: If uploading multiple Web Parts, Sharepoint requires that you edit each Web Part individually and change the Group after uploading.



Screen 3

Step 5: Adding Web Parts to a Page
Go to the page to edit.
Click Site Actions, and then click on Edit Page.
From Editing Tools, click on Insert.
Click on Web Part.
From the Categories List, Click on the WebFOCUS Web Parts category (See Screen 4).
Select Web Part and click Add.



Screen 4

To display the Web Part properties, hover over the right-most corner of the Web Part to display a dropdown menu. Click on Edit Web Part.
Expand the Content category, edit the Source URL and change the machine name, port and context path that points to the WebFOCUS client if the *.dwp* files were not edited prior to upload. Click Apply and OK. Repeat this step for each Web Part added to the page.

Tips for a Successful WebFOCUS 7.7 Install

By Mona Baker

To successfully install WebFOCUS 7.7, you need some information that is often overlooked. With that in mind, I have put together a checklist of 10 things you must consider when installing the product.

1. Installing on a 64-bit machine: If we detect a 32-bit Java on your machine, we will ask you if you want to install at 32-bit or 64-bit version of WebFOCUS 7.7. The default is 64-bit. If you already have Tomcat running at 32-bit, but you choose to install our product at 64-bit, we will install a new 64-bit version of Tomcat for you. The same is true when selecting to install Derby.

2. Third-party software: Tomcat and Derby will be installed on your machine, by default, under our IBI directory structure. In the past, Tomcat was installed under the default Apache directory. *Note:* If you install Tomcat separately from the Information Builders installation, you may do so in any location you choose.

3. When you are running WebFOCUS 7.6.x, the path to 7.7.x is through a migration. Here is what you need to do:
   - Run a full install of 7.7.
   - Use migration tools to migrate your data from 7.6.x to 7.7.x. To locate details on the various items you can migrate, please see the migration index listing in the WebFOCUS Installation manuals.

4. If you uninstall WebFOCUS on Windows, we will uninstall the *entire* WebFOCUS directory. This means that any non-standard WebFOCUS files will be removed. For example, if you have backed-up files under the WebFOCUS directory, please move them before you run an uninstall, otherwise they will be deleted. This includes the `basedir` file and all files under the WebFOCUS directory.

5. If running WebFOCUS under the WebSphere Application Server, please note that the default JSP compiler level on WebSphere (any release) is 1.3. In order to use WebFOCUS 7.7, you must update the JSP compiler level to JSP 1.5. The information is documented in our installation manuals under the WebSphere configuration chapter.

6. WebLogic 10 and higher requires some manual configuration after the installation. Please check our documentation for configuration options.

7. If you are using IIS with Tomcat there may be manual steps you will need to perform to configure IIS properly. The installation will attempt to configure IIS properly; however, if it fails, a message will appear advising you to do a manual configuration.

8. When the installation program prompts you for a Web Port Number, it is asking for the port needed for the HTTP Listener port. Use the port number appropriate for your HTTP Listener Port (either the HTTP Web Server port number or Web Application Server HTTP port number).

9. Be aware that if you select to install Tomcat on any Unix platform, the installation program prompts for the HTTP Listener Port Number. It will then use the next two consecutive numbers for the additional Tomcat ports that need to be allocated. If you do not change the default port number (8080) we do not change any port number within Tomcat.

10. Please note that we do include a parameter file to allow you to run the installation silently. All prompts will be satisfied by the information in the parameter file. This is the easiest way to install and you can carefully review your information before executing the installation. We recommend that you review the silent parameter file and edit it according to your environmental needs. You will find a reference to the silent parameter file in the WebFOCUS Installation Manual.

New Feature: Hold Format Magnify

By Donald Klepack

A new FOCUS hold format command is being added to release 7.7.02 called `HOLD FORMAT MAGNIFY`. The end result of running a procedure with this command is to make your data immediately available to the Magnify enterprise search tool. This means that right out of the box you can add your data to the Magnify search tool that comes with WebFOCUS with only a limited amount of preparation.

If you have any relational, fix form, free format file, or any data source, you can use a `TABLE FILE` command and directly produce a Magnify index file. This will be demonstrated using the sample `MOVIES` file that comes with the installation of WebFOCUS.

Below is the Movies Master File Description:

```
FILENAME=MOVIES,     SUFFIX=FOC
SEGNAME=MOVINFO,     SEGTYPE=S1
 FIELDNAME=MOVIECODE,     ALIAS=MCOD,      FORMAT=A6, INDEX=I, $
 FIELDNAME=TITLE,         ALIAS=MTL,       FORMAT=A39,         $
 FIELDNAME=CATEGORY,      ALIAS=CLASS,     FORMAT=A8,          $
 FIELDNAME=DIRECTOR,      ALIAS=DIR,       FORMAT=A17,         $
 FIELDNAME=RATING,        ALIAS=RTG,       FORMAT=A4,          $
 FIELDNAME=RELDATE,       ALIAS=RDAT,      FORMAT=YMD,         $
 FIELDNAME=WHOLESALEPR,   ALIAS=WPRC,      FORMAT=F6.2,        $
 FIELDNAME=LISTPR,        ALIAS=LPRC,      FORMAT=F6.2,        $
 FIELDNAME=COPIES,        ALIAS=NOC,       FORMAT=I3,          $
```

By using `DEFINE` fields and `AS` statements, we can create FOCUS procedures that contain the six components to do a search:

Type	Alias Name or Prefix	Purpose
Title	SearchTitle	A single field, concatenation of fields or string.
Unique ID	MagnifyID	Primary Key field(s)
Categories	C_ or M_<category>	Category Field name used in Magnify Category Tree (pre-parsed)
Magnify Attributes	Magnify Attributes	Reserved META TAGS names as defined in Magnify Documentation
Other Attributes	Other Attributes	Any other field or virtual field
Search Body	S_<fieldname>	Concatenation of fields and virtual fields

The procedure will need to contain the Magnify Engine properties setting that controls how data is fed into the Lucene index.

Magnify the FOCUS Indexing Settings.

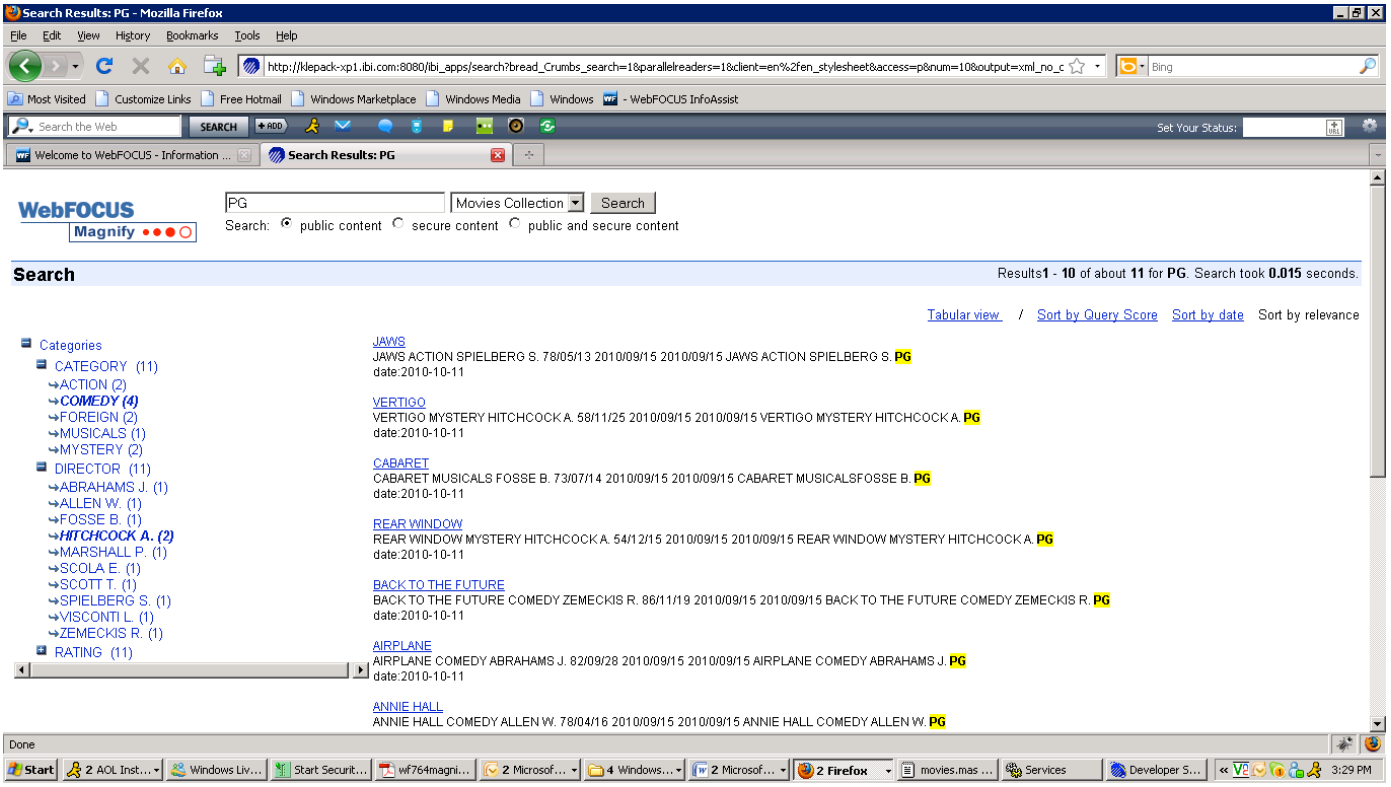
Property	Description	Example
CONNECTION_ATTRIBUTES	Magnify Indexing Servlet	http://localhost:8080/ibi_apps/xmlfeedtest
BaseURL	WebFOCUS Report base url	http://localhost:8080/ibi_apps/WFServlet
MIME	Document mime type	text/plain
DATASOURCE	Magnify index library directory	Movies
DELIMITER	Separator for multiple categorizations	#!#
BATCHSIZE	Number of records to burst at a time	100

The FOCUS procedure is annotated here:

```
-**********Engine settings
ENGINE MAGNIFY SET CONNECTION_ATTRIBUTES MY_PC
'http://localhost:8080/ibi_apps/xmlfeed'
ENGINE MAGNIFY SET BaseURL=http://localhost:8080/ibi_apps/WFServlet
ENGINE MAGNIFY SET MIME=text/plain
ENGINE MAGNIFY SET DATASOURCE=movies
ENGINE MAGNIFY SET DELIMITER=#!#
ENGINE MAGNIFY SET BATCHSIZE=2

-****** required SET command
SET ASNAMES=MIXED
-****** Application Path
APP HOLD test

DEFINE FILE MOVIES
OLD_DATE/I8YYMD= 20100915;
NEW_DATE/YYMD = OLD_DATE;
-******
MagnifyAction/A10 = 'add';
SEARCHBODY/TX50=TITLE|CATEGORY|DIRECTOR|RATING;
END

TABLE FILE MOVIES
PRINT
     TITLE                          AS 'SearchTitle'
-* Magnify Attribute
     MOVIECODE                      AS 'MagnifyID'
     MOVIECODE                      AS 'WF_INDEX_UNIQUE_KEY'
-* category variable start with C_
     CATEGORY                       AS 'C_CATEGORY'
     DIRECTOR                       AS 'C_DIRECTOR'
     RATING
     MagnifyAction
-* search variables start with S_
     TITLE                          AS 'S_Title'
     CATEGORY                       AS 'S_CATEGORY'
     DIRECTOR                       AS 'S_DIRECTOR'
     RELDATE                        AS 'S_RELDATE'
     OLD_DATE                       AS 'S_OLD_DATE'
     NEW_DATE                       AS 'S_NEW_DATE'
     SEARCHBODY                     AS 'S_SearchBody'
ON TABLE HOLD FORMAT MAGNIFY AS MAGN_MOVIES_BATCH
END
```

Once the procedure is run, it writes the movies sub-directory containing the index to …\ibi\WebFOCUS77\magnify\lucene_index. Also, before you do the search you need to wait based on the timers used for feeding data to the Magnify search. See documentation on Magnify Timers Explained.

Look at Screen 1, produced by entering *PG* in the search dialog box:



Screen 1

This is just a simple example of what `HOLD FORMAT MAGNIFY` can do. Please read the documentation for 7702 to learn the full capability for this new feature and how it integrates with the Magnify enterprise search tool.

Activate Your Dashboard With InfoAssist

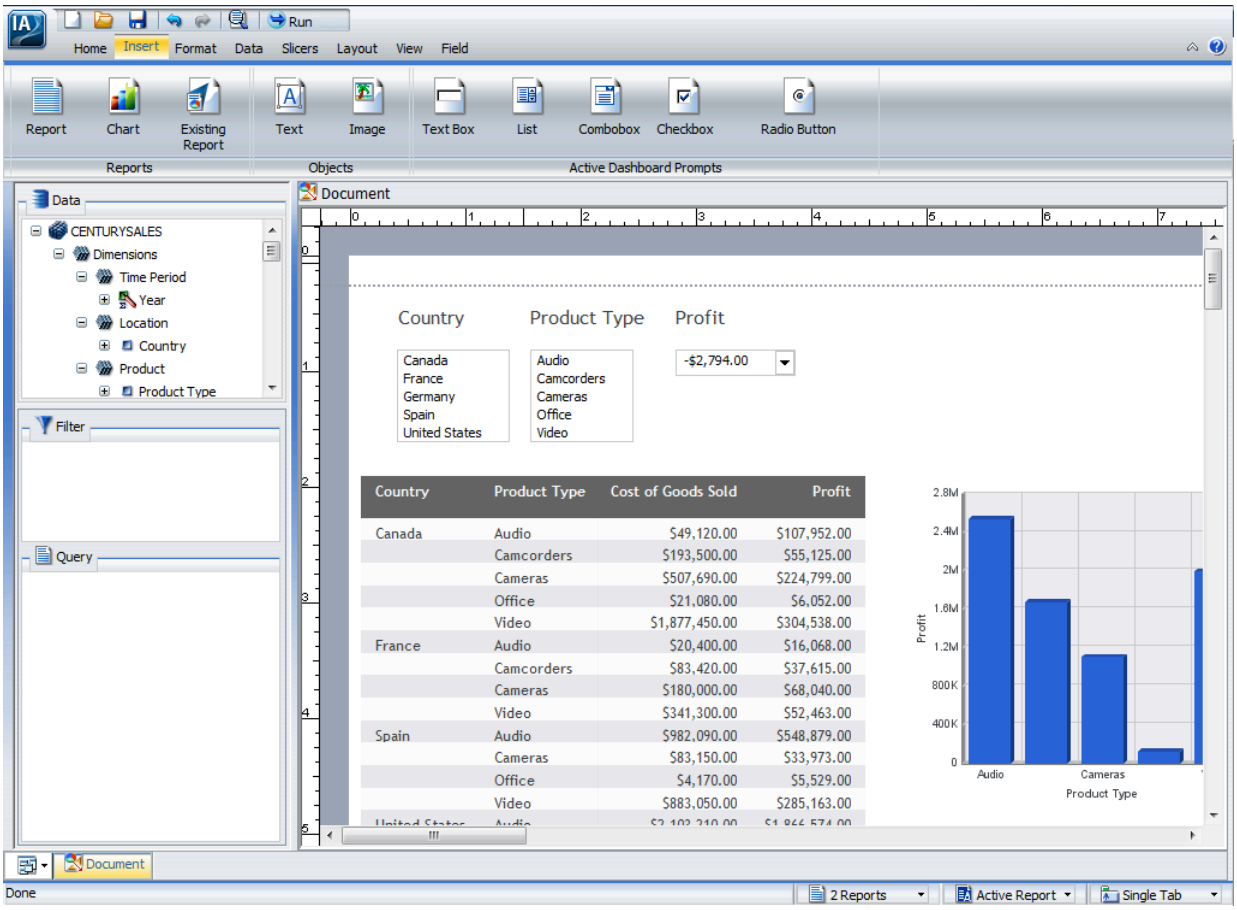
By Matthew Lerner

In WebFOCUS 7.7.01, Information Builders enhanced InfoAssist's Document Mode to allow you to create Active Dashboards in both HTML and Flash using a single global prompt. With WebFOCUS 7.7.02, we are taking this capability to the next level. Instead of a single global filter, you can now insert as many prompts as you want.

This new feature, called Active Dashboard Prompts, allows you to insert as many of the following types of prompts as you would like:

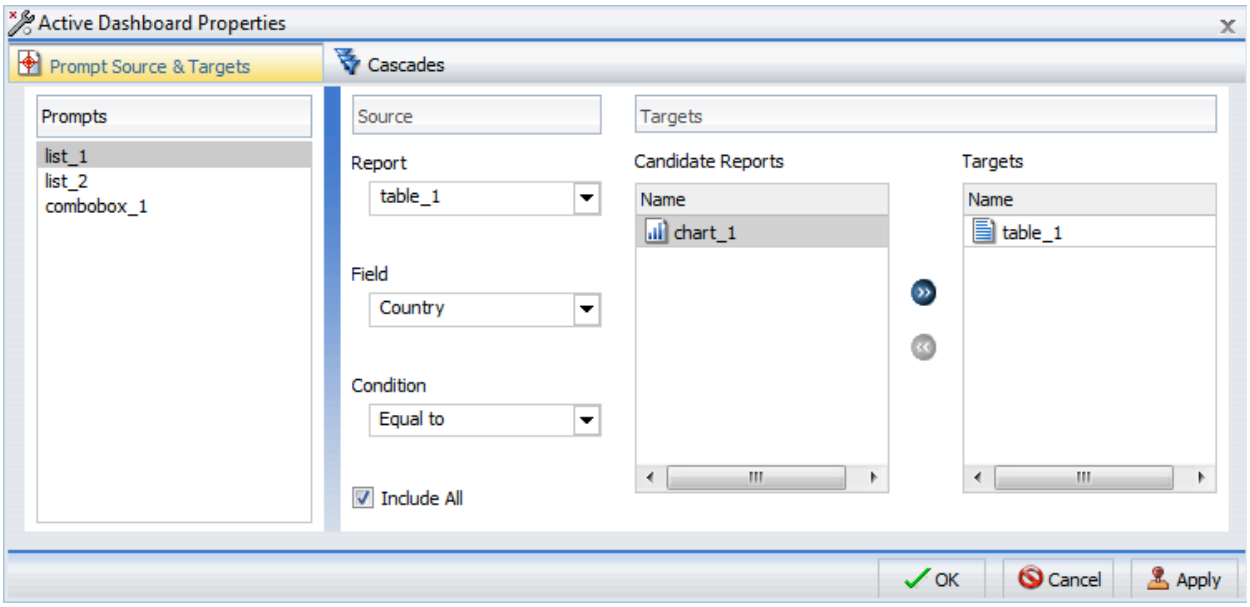
Text
List
Combobox
Checkbox
Radio Button

See **Screen 1** for an Active Dashboard Prompts Design View.



Screen 1

Each prompt is populated by one of the reports or charts on the Dashboard. You can then choose which of the other reports/charts the prompt filters.

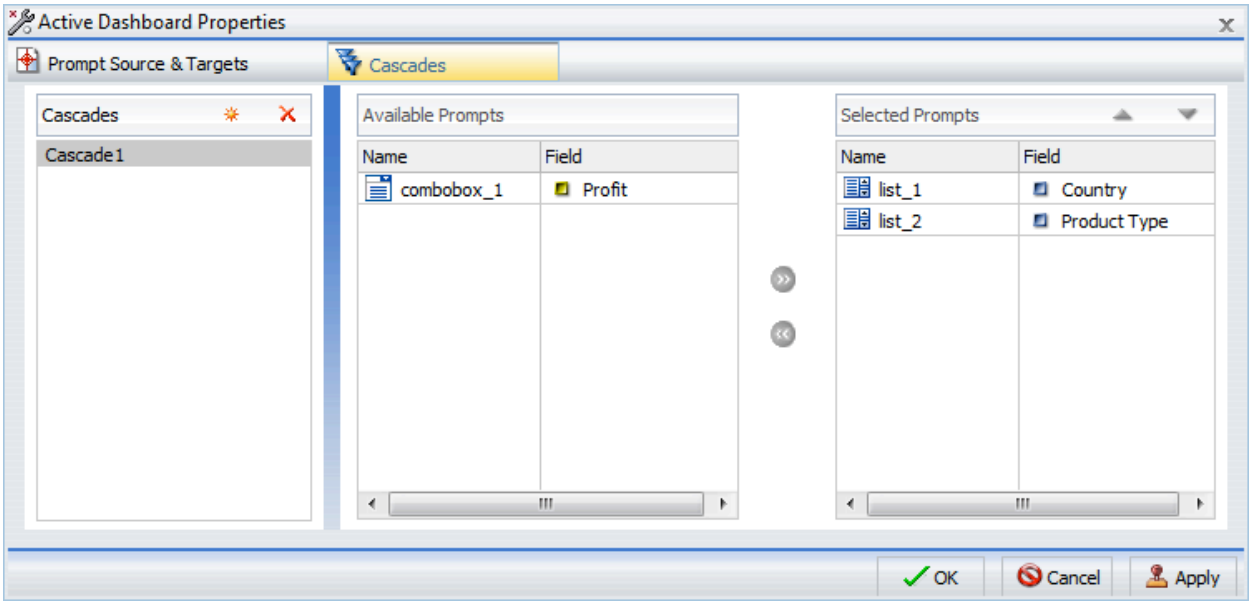


Screen 2

Active Dashboard prompts in InfoAssist are based on the WebFOCUS Enable prompting model. As such, you can create independent prompts and cascaded (parent-child) prompts.

Independent prompts are not linked to other prompts.

The last prompt you interact with is the one that is currently applied. Cascaded prompts are linked together in a parent-child relationship. The parent prompt filters all of the children prompts. All linked prompts are applied to their targets.



Screen 3

Screen 3 shows Cascade Properties.

The example that appears in the screens accompanying this article shows three prompts:

Country
Product type
Profit

Country and product type are cascaded together in order, while profit is currently an independent prompt. This can be adjusted using the Cascade Properties settings. You can even create multiple cascades that are independent of one another.

Active Dashboard Prompts bring a whole new world of possibilities to InfoAssist. For the first time you can create embedded cascaded prompts without the need of a desktop product and programming knowledge.

The Power of Waterfall Charts

By Nick Zavalkov

Let's begin with a description of waterfall charts. Waterfall charts are normally used for understanding how an initial value is affected by a series of intermediate positive or negative values. Usually the initial and the final values are represented by whole columns, while the intermediate values are denoted by floating columns.

Now we must understand how WebFOCUS waterfall charts read and interpret Data. Below is sample data that will be plotted as a waterfall chart:

MONTH	Merchendise	Auto	Travel	Other
January	779	63	5	148
February	63	90	43	0
March	-30	0	-10	0
April	-5	0	-5	0
May	-8	0	0	-1
June	0	-53	0	0
July	-48	0	0	0
August	803	99	159	4

As you can see, our initial (or starting) value is for January. Our final value is on August. All other values are called intermediate, and they either add or subtract from the initial value. However, the final value in our example is not the total of intermediate values.

By default WebFOCUS waterfall charts will not represent the final group as a total value, but rather simply treat it as another intermediate step. We have an option to make the last group be a `TOTAL`, but we must be very careful how we use this feature. When we do decide to make the last group be `TOTAL` (or something like "Year to Date"), it will simply ignore all the values in the last group (August in our example), and it will give the total of values previous to the last group. The following API call will make the last group be a total:

```
setWaterfallGroupMode(7,2);
```

The first number in this API call represents the group; in our example the last group is number 7 (8 groups, start at 0). The second number represents the mode that will be plotted.

There are 4 possible modes for each group:

0: Normal, where series risers are stacked on top of each other and each successive series represents the value of its series/group plus any preceding series/group. (This value is the default)

1-Subtotal, which will give a subtotal of groups prior to that group, ignoring all data in that group.

2-Total, which will give a total of groups prior to that group, ignoring all data in that group.

3-Extra, which will simply be represented as a stacked bar. It should only be defined for a last group.

So if the last group is going to be made a total, this is how the data will be interpreted by a waterfall chart:

MONTH	Merchendise	Auto	Travel	Other
January	779	63	5	148
February	63	90	43	0
March	-30	0	-10	0
April	-5	0	-5	0
May	-8	0	0	-1
June	0	-53	0	0
July	-48	0	0	0
Year To Date	751	100	33	147

As you can see, the values for the last group, which will be plotted on the Waterfall Chart, are not the same as they were in our original example:

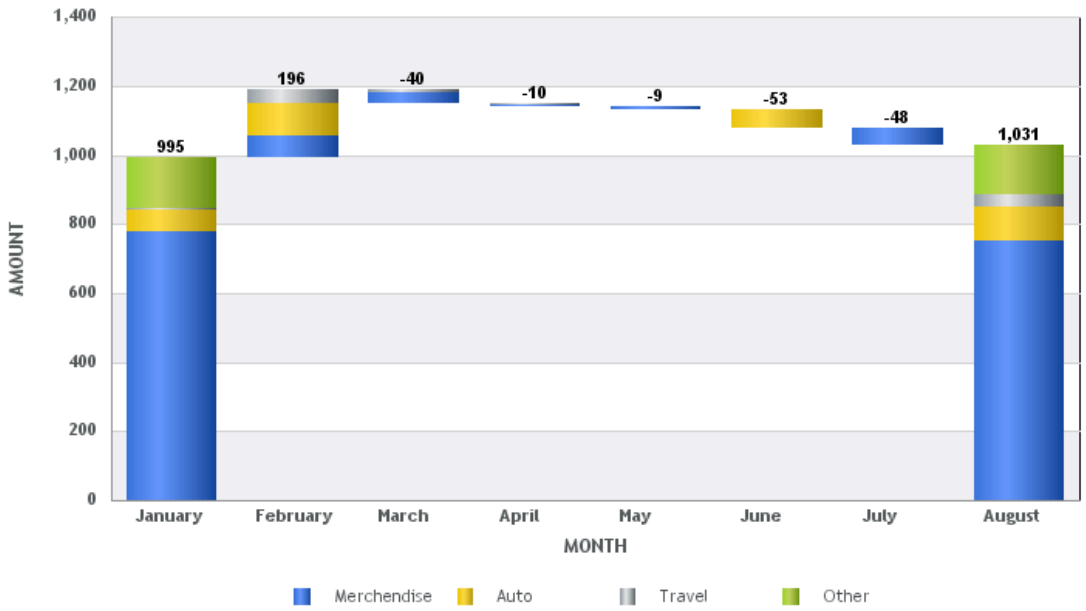


Figure 1

Notice "Year to Date" total is plotted on the last group label, which is August.
We can then rename the last group to be "Year to Date" by the following API call:

```
setGroupLabel(getGroup(7), "Year To Date");
```

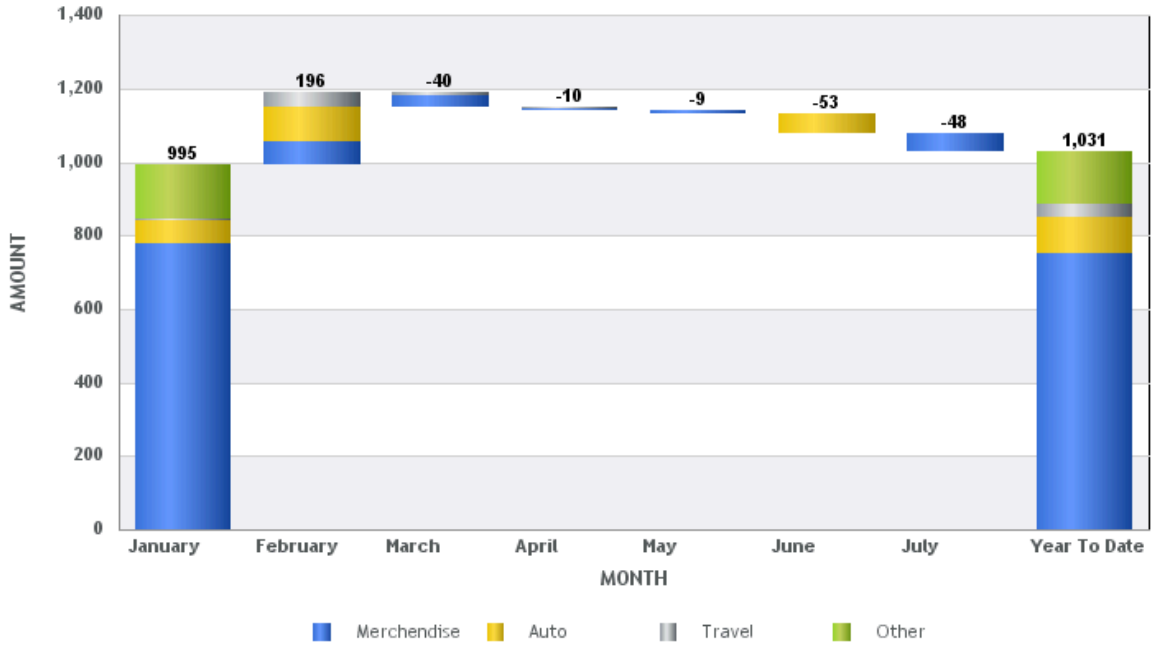


Figure 2

We also have an option in WebFOCUS waterfall charts to make the last group be simply a stacked bar, which will correctly represent the original data, by the following API call: `setWaterfallGroupMode(7,3);`

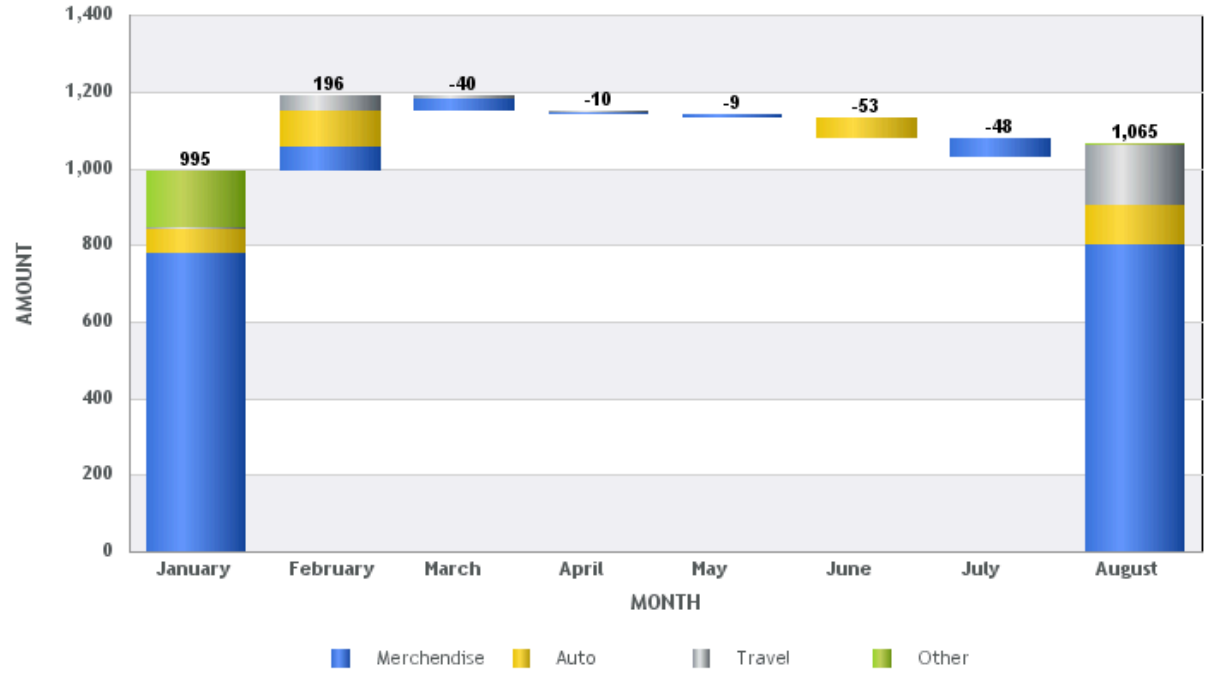


Figure 3

If, however, we want to see the last group plus the total of all groups, then we would need to recalculate the data and add one more additional group, which will be called "Year to Date:"

MONTH	Merchendise	Auto	Travel	Other
January	779	63	5	148
February	63	90	43	0
March	-30	0	-10	0
April	-5	0	-5	0
May	-8	0	0	-1
June	0	-53	0	0
July	-48	0	0	0
August	803	99	159	4
Year To Date	1554	199	192	151

And now if we use the option of making the last column a `TOTAL` (or "Year to Date"), then the waterfall chart will look like this:

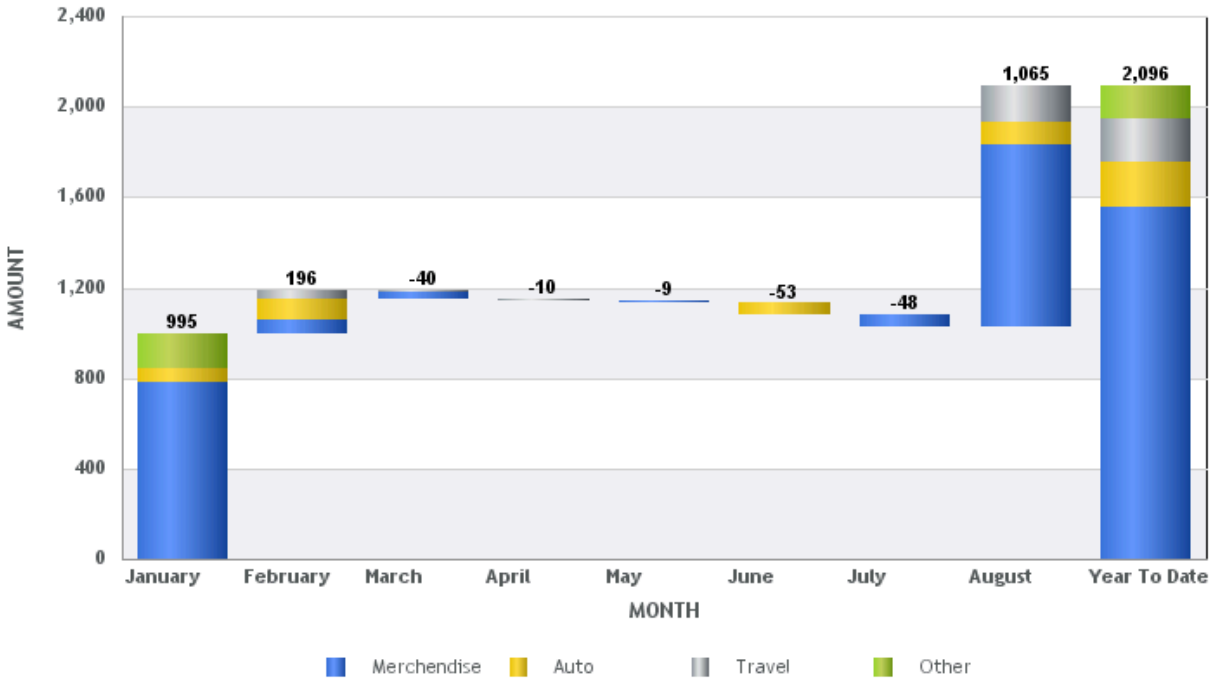


Figure 4

In WebFOCUS 7.7.02 we added two new features to waterfall charts:

1. Make the last group be a total with the following new API call:

   ```
   setWaterfallLastGroupTotal(true);
   ```
   Note: this API call acts exactly as `setWaterfallGroupMode(7,2);` in our example, except there is no need for the user to know which number represents the last group.

2. Make all the positive values on the Waterfall Chart be represented as green color bars and all the negative values be represented as red color bars:

```
setWaterfallStackColorMode(true);
```

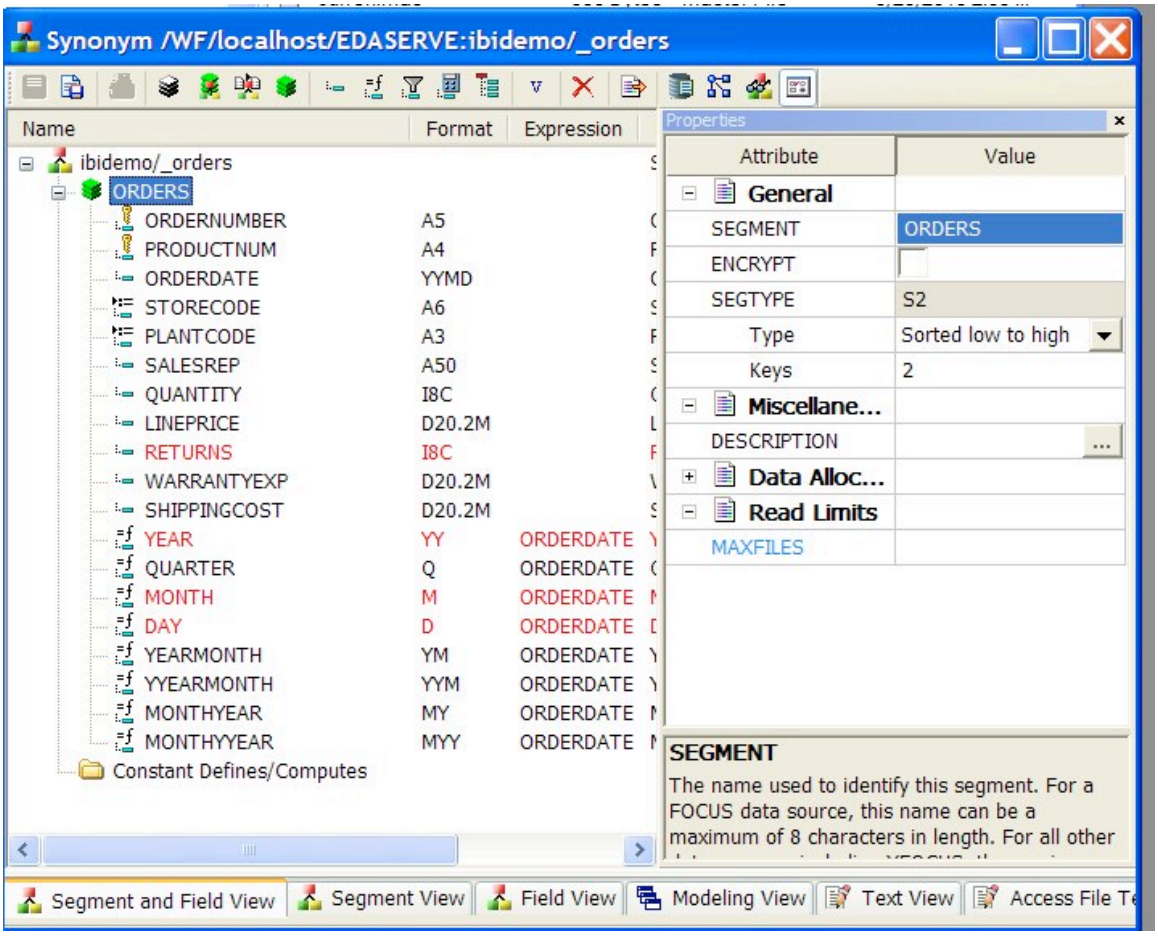
Developer Studio 7.7.01: Validation Messages in Synonym Editor

By Maria Volant

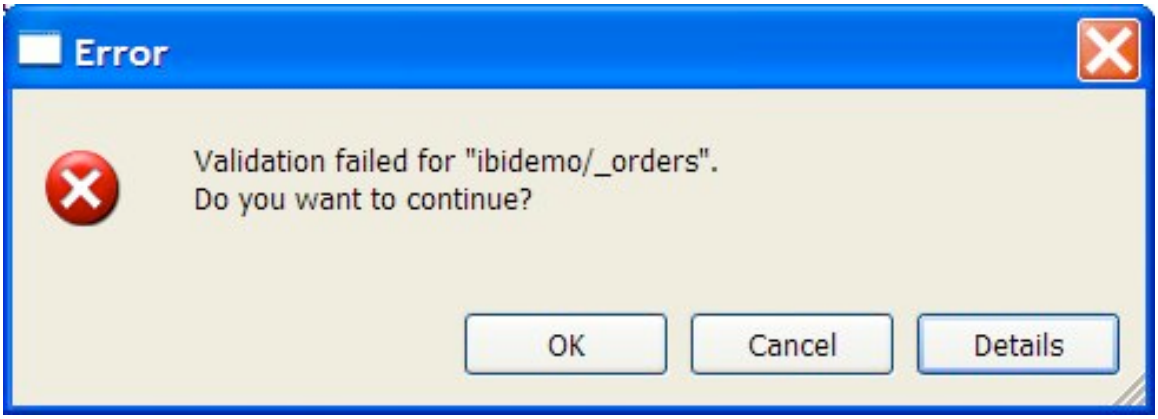
Starting with Developer Studio 77.0.1, validation is performed when saving changes to a Master File in the Synonym Editor tool. Thus, if a Master File contains syntax that is either invalid or of restricted usage, a pop-up message is generated upon saving changes to the synonym in Synonym Editor.

The message, however, is simply a warning to alert you of what has been found wrong with the synonym, or to make you aware of any existing warning conditions. Should you decide to save the synonym, the changes are properly saved. Any requests executed against the synonym, assuming it does not contain invalid or unsupported syntax, should run fine.

For example, if you were to make any changes to the synonym shown on **Screen 1**, you would receive the validation message on **Screen 2**.

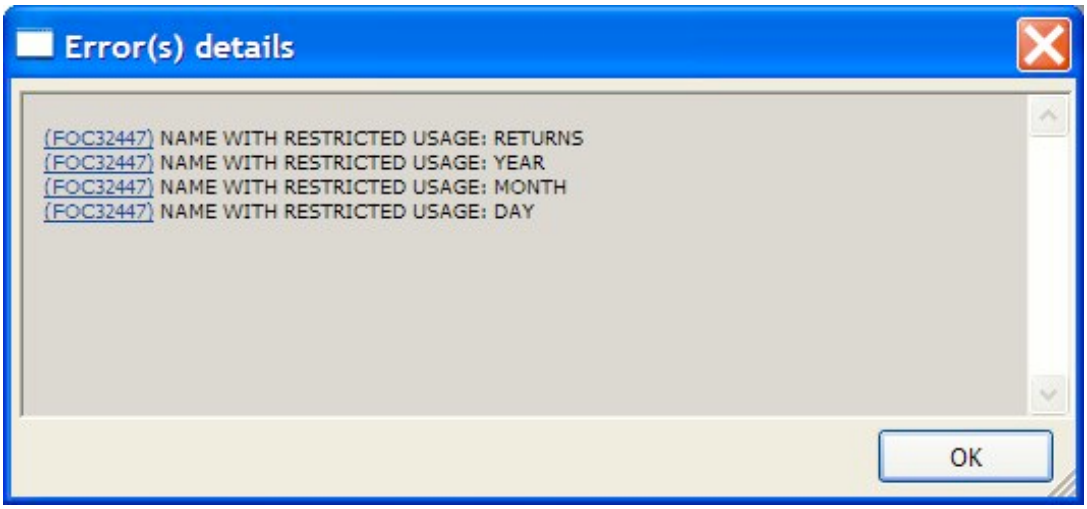


Screen 1



Screen 2

Clicking the OK button on **Screen 2** would save the current changes made to the synonym. Clicking on the Cancel button would close the validation message and return you to Synonym Editor. Clicking the Details button would show the details outlined on **Screen 3**.



Screen 3

As you can see on **Screen 3**, the validation message is generated because the synonym contains fieldnames that are considered SQL reserved words. You could potentially experience problems working with SQL requests against synonyms that contain fieldnames that are SQL reserved words, so displaying the validation message can help you identify the problem when updating the synonym in Synonym Editor.

Again, runtime is not affected by this new behavior. The validation messages are displayed when saving changes to the synonym at design time in Synonym Editor, and are intended to alert you of a possible warning condition. They will not prevent you from saving the changes made to the synonym. In the next release, the information displayed in the pop-up box shown on **Screen 2** will be modified to reflect that the message is simply a warning, and not necessarily an error or a failure.