Administering IBM Db2 Web Query for i

Release 2.4.0

Contents

Chapter 1

Db2 Web Query Administration Console

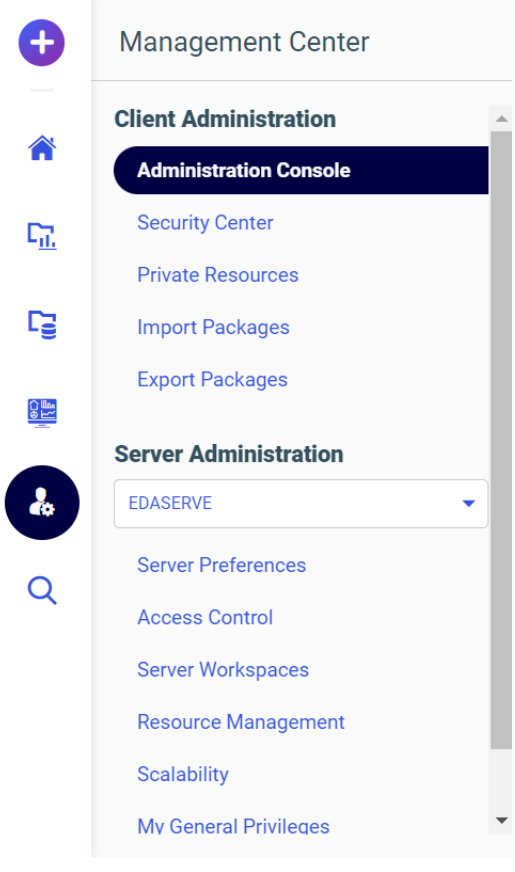
The Db2 Web Query Administration Console enables you to remotely manage your Db2 Web Query environment. Using the Console, administrators can navigate through and change various configuration settings for the Db2 Web Query Client.

In this chapter:

Accessing the Db2 Web Query Administration Console

To access the Administration Console, on the Hub:

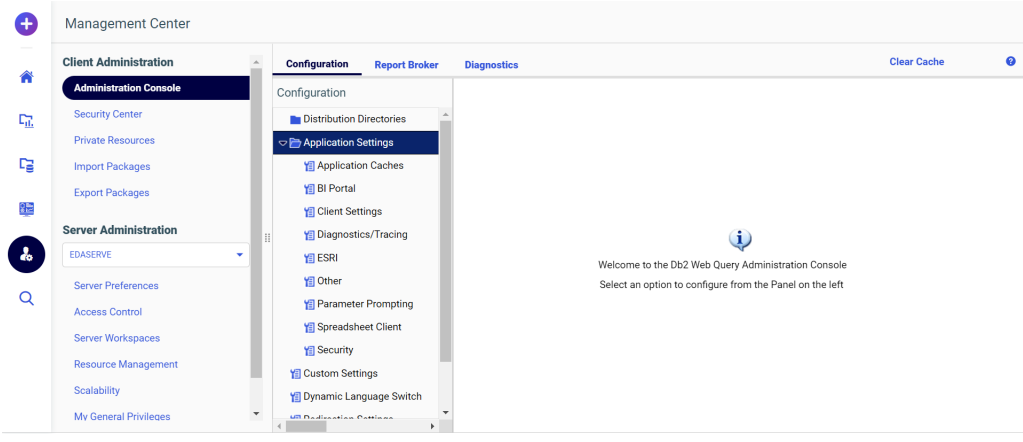
- ❑ In the side navigation pane, select *Management Center* and then, under *Client Administration*, select *Administration Console*, as shown in the following image.



The Db2 Web Query Administration Console opens.

Configuring Db2 Web Query

To use the Db2 Web Query Administration Console to update Db2 Web Query Client configuration settings, click the *Configuration* tab and select one of the categories in the menu, as shown in the following image.



You can also click any of the following options located on the right side, along the top of the screen:

Clear Cache. Clears your memory cache, which contains information that gets processed with every Db2 Web Query Servlet request. This includes Db2 Web Query script and configuration files, and the default Managed Reporting Driver cache.

By clearing the cache, it fully revokes the Report Broker scheduling privileges from a user. This should be done after a user is moved into or removed from a folder-sched group.

Help. Opens the online help file.

Application Settings

Application Settings determine the configuration and behavior of the Db2 Web Query web application.

Procedure: How to View or Edit Application Settings

1. In the Administration Console, on the Configuration tab, expand the *Application Settings* folder and click the node of the category of settings you would like to view or edit.

   The settings appear in the main configuration pane.

2. Make the desired changes and click *Save*.

Reference: Application Caches Settings

Settings on the Application Caches page configure the size and contents of the Data Values Cache on the Application Server. This cache contains values assigned to parameters used in Autoprompt Reports, Embedded BI Applications, or any procedure that includes the FIND parameter syntax to limit the range of available search parameter values.

These settings establish the default configuration for Data Values Cache operations in your environment. Administrators and users who have the privilege to work with the Session Viewer can temporarily override these default settings using options in the Caching list.

The Application Caches page also includes the Report Output Cache setting that establishes the use of a separate cache for report output.

Data Values Max Cache Memory (MB)

Defines the maximum amount of memory allocated to the Data Values Cache. This cache holds the data source values retrieved from queries to the Server issued by procedures that identify their Master File sources with a two-part name in the FIND parameter syntax. These values are typically assigned to parameters used in Autoprompt Reports, Embedded BI Applications, or to any procedure that includes the FIND parameter syntax to limit the range of available search parameter values. This cache also contains the IBFS path to the Master File and the ID of the user that ran the procedure. The Data Values Cache uses memory on the machine that hosts the Web Query Application Server.

This setting is assigned a value of zero (0), by default, meaning that no memory is allocated to the data values cache, and no data values are cached.

To activate the use of the data values cache, an administrator must assign a number from one (1) to five hundred (500) to this setting. A value of ten (10) megabytes can accommodate the caching requirements for most organizations.

Data Values User Cache Paths

Identifies the IBFS Paths to those resources whose data source values should only be made available to the individual user who retrieved the data.

The paths defined in this setting should only identify resources that contain data that is subject to DBA or row-level security restrictions. For calls to cache resources that are not subject to these restrictions, Web Query uses the paths defined in the Data Values Global Cache Paths setting.

If no IBFS Paths are defined in this setting, then no data source values are cached. This is the default value.

If one or more IBFS Paths are defined in this setting, then data values retrieved from all of the resources identified in those paths can be included in the Data Values User Cache for an individual user. If this setting must include multiple paths, they must be separated by a semicolon (;) with no space following, as shown in the following example: /EDA/EDASERVE/retail_samples;/EDA/EDASERVE/ibisamp.

Paths defined in this setting use the IBFS Path format. At a minimum, they must include the /EDA IBFS subsystem component, followed by the name of the Server Node. Shorter, higher-level paths define a broad range of folders and the Master Files they contain. Longer paths that extend to a lower level define a narrower range of application folders and Master Files. Paths can extend down to the level of an individual application folder or a single Master File.

To include multiple folders or Master Files in this setting, you can use a short, higher-level path that includes a range of folders, or a series of longer and more detailed paths that identify a very specific group of folders and Master Files. If this setting must include multiple paths, each one must be separated by a semicolon (;) with no space following, as shown in the following example: /EDA/EDASERVE/retail_samples;/EDA/EDASERVE/ibisamp.

IBFS Paths in this setting use the following structure. Only the first two components of the path are required. You can use as many of the remaining path components as you wish to narrow the focus of the path.

`/EDA/Node/ApplicationFolder/SubFolder1 ... SubFolderN/Resource`

where:

EDA

Is the EDA IBFS subsystem. This component is required for all paths. The initial slash (/) before this component is required.

Node

Is the name of the node. This component is required for all paths.

ApplicationFolder

Is the name of the application folder that contains the resources from which data will be added to the data values cache.

SubFolder1 ... SubFolderN

Are the names of any folders in the path underneath the application folder that connect to the end point of the path. Include as many folders as are necessary.

Resource

Is the end point of the path. If this is the name of a folder that contains one or more Master File resources, then data from all Master Files in the folder is included in the cache. If this is the name of a Master File without the .mas extension, then only data from this specific Master File is included in the cache.

Note: Paths to any folders or Master Files identified in the Data Values User Cache Paths setting take precedence over those identified in the Data Values Global Cache Paths setting. This means that if the same path appears in the Global Cache Path setting and the User Session Class Path setting, then data retrieved from the Master Files in that path moves into the User Session Cache, instead of the Global Cache.

Data Values Global Cache Paths

Identifies the IBFS Paths to those resources whose data source values can be made available to all users without restriction in the Global Data Values Cache.

The paths defined in this setting should only identify resources that contain data that is not subject to DBA or row-level security restrictions. For calls to cache resources that contain data that is subject to these restrictions, Web Query uses the paths defined in the Data Values User Cache Paths setting.

If no IBFS Paths are defined in this setting, then no data source values are included in the Data Values Global Cache. This is the default value.

If one or more IBFS Paths are defined in this setting, then data values retrieved from the resources identified in those paths are included in the Data Values Global Cache.

Paths defined in this setting use the IBFS Path format. At a minimum, they must include the /EDA IBFS subsystem component, followed by the name of the Node. Shorter, higher-level paths define a broad range of folders and the Master Files they contain. Longer paths that extend to a lower level define a narrower range of application folders and Master Files. Paths can extend down to the level of an individual application folder or a single Master File.

To include multiple folders or Master Files in this setting, you can use a short, higher-level path that includes a range of folders, or a series of longer and more detailed paths that identify a very specific group of folders and Master Files. If this setting must include multiple paths, each one must be separated by a semicolon (;) with no space following, as shown in the following example: /EDA/EDASERVE/retail_samples;/EDA/EDASERVE/ibisamp.

IBFS Paths in this setting use the following structure. Only the first two components of the path are required. You can use as many of the remaining path components as you wish to narrow the focus of the path.

/EDA/Node/ApplicationFolder/SubFolder1 ... SubFolderN/Resource

where:

EDA

Is the EDA IBFS subsystem. This component is required for all paths. The initial slash (/) before this component is required.

Node

Is the name of the node. This component is required for all paths.

ApplicationFolder

Is the name of the application folder that contains the resources from which data will be added to the data values cache.

SubFolder1 ... SubFolderN

Are the names of any folders in the path underneath the application folder that connect to the end point of the path. Include as many folders as are necessary.

Resource

Is the end point of the path. If this is the name of a folder that contains one or more Master File resources, then data from all Master Files in the folder is included in the cache. If this is the name of a Master File without the .mas extension, then only data from this specific Master File is included in the cache.

Data Values Cache Paths to Exclude

Identifies the IBFS Paths to those folders or Master Files within the paths defined in the Data Values Global Cache Paths or the Data Values User Cache Paths settings whose values should be not be included in these caches.

If no IBFS Paths are defined in this setting, no data values are excluded from the individual resources or folders defined within the paths in the Data Values Global Cache Paths or the Data Values User Cache Paths settings. This is the default value.

If one or more IBFS Paths are defined in this setting, data values from the individual resources or folders defined within these paths are excluded from the Global Data Values Cache and from individual User Session Caches even though the folder or directory in which they are contained is subject to caching.

Paths defined in this setting use the IBFS Path format. At a minimum, they must include the /EDA IBFS subsystem component, followed by the name of the Server Node. Shorter, higher-level paths define a broad range of folders and the Master Files they contain. Longer paths that extend to a lower level define a narrower range of application folders and Master Files. Paths can extend down to the level of an individual application folder or a single Master File. Typically, this setting requires longer and more specific paths in order to identify the individual folders or Master Files that must be excluded from the paths defined in the other data cache settings.

When this setting includes multiple paths, each one must be separated by a semicolon (;) with no space following, as shown in the following example: /EDA/EDASERVE/retail_samples;/EDA/EDASERVE/ibisamp.

IBFS Paths in this setting use the following structure. Only the first two components of the path are required. You can use the remaining components to narrow the focus of the path.

/EDA/Node/ApplicationFolder/SubFolder1 ... SubFolderN/ResourceFolder/Resource

where:

EDA

Is the EDA IBFS subsystem. This component is required for all paths. The initial slash (/) before this component is required.

Node

Is the name of the node. This component is required for all paths.

ApplicationFolder

Is the name of the application folder that contains the resources whose data will be excluded from the data values cache.

SubFolder1 ... SubFolderN

Are the names of any folders underneath the application folder that connect to the end point of the path. Include as many folders as are necessary.

Resource

Is the end point of the path. If this is the name of a folder that contains one or more Master File resources, then data from all Master Files in the folder is excluded from the cache. If this is the name of a Master File without the .mas extension, then only data from this specific Master File is excluded from the cache.

Report Output Cache

Indicates whether or not report output is cached. The following values are available:

- **Off.** Report output is not cached. This is the default value.
- **On.** Report output can be cached, and the Properties dialog box on the Legacy home page displays the Report Output Cache Rule Name field.
- **Hidden.** Report output can be cached, but the Properties dialog box on the Legacy home page does not display the Report Output Cache Rule Name field.

Report output is information retrieved from the in response to report or chart procedure queries and includes data values, column titles, and formatting features.

Note: The Report Output Cache Rule Name field displays a text string that identifies the rule that governs the way in which report output data is cached. These rules determine if a cache is available to everyone, available only to the user that requested the data, or if it can be shared by the members of the group to which that user is assigned.

Reference: BI Portal Settings

BI Portal settings configure the display and behavior of the BI Portal.

Sign-in Message

Specifies a custom message that displays in the Messages dialog box when a user signs in. You can enter plain text or HTML tags for text, links, and images, into this field. If you leave this field blank, the Messages dialog box does not display.

The following HTML tags may be used in the sign-in message:

<i>, <br>, <b>, <u>, <a href>, , <img>.

Sign-in Page Links

Determines whether the Db2 Web Query Sign in page displays or hides links.

When this check box is selected (True), the Db2 Web Query Sign in page displays additional text and links to additional information or support sites. This is the default setting.

When this check box is cleared (False), the Db2 Web Query Sign in page does not display any additional supporting text of links, and limits the display to the Screen Title, User Name, Password, and Sign in button.

Session Timeout

Controls the session timeout value, which limits the amount of time users can remain idle before a session timeout takes place. This setting is defined in minutes, for example, IBI_Session_Timeout=120.

Reference: Client Settings

Client settings configure miscellaneous Client options.

Maximum Response Window Size

Defines the maximum size, in bytes, allowed for responses in the original window when using Internet Explorer.

Responses larger than the size identified in this setting will be launched in a new window, to ensure that it will open without errors. If this setting is blank, no maximum limit is applied. The default value is 400,000 bytes.

Excel Server URL

Identifies the location of the resource that Web Query uses to render output in the Excel 2007 file (.xlsx) format.

The Excel Server URL drop-down list contains two options:

- **Reporting Server JSCOM (labeled as Default).** Directs output to the JSCOM3 listener on the Reporting Server, which will then render the output in the Excel file format. The URL used by this setting is the URL of the JSCOM3 listener. Use this option if you need to support SSL or any type of authentication other than the default internal security. Web Query is configured for JSCOM, overriding the default option.
- **Default.** Directs output to the IBIExcel Servlet on the mid tier, which will then render the output in the Excel file format. The URL used by this setting is the Default URL for Web Query. Use this option if you do not need to support SSL or any type of authentication other than the default internal security. This is the default option.

Graph Server URL

Identifies the location of the resource that Web Query uses to render output in graph image file format.

The Graph Server URL drop-down list contains two options:

- **Reporting Server JSCOM.** Directs output to the JSCOM3 listener on the Reporting Server, which will then render the output in graph image file format. The URL used by this setting is the URL of the JSCOM3 listener. Use this option if you need to support SSL or any type of authentication other than the default internal security.

- **Default.** Directs output to the IBIGraph Servlet on the mid tier, which will then render the output in graph image file format. The URL used by this setting is the Default URL for the Web Query. Use this option if you do not need to support SSL or any type of authentication other than the default internal security. This is the default option.

  This option is required on z/OS. In all other environments, JSCOM3 is the recommended configuration option.

Transin-Transout

Is a fully qualified Java class that does the transin and transout processing (processing of a request to and output returned by the Reporting Server) for a plug-in for the Servlet version of the client. This class must implement the WFTransInOutInterface Java class. For example, one use of this class can be to enable data that is passed between the Reporting Server and the Servlet to be parsed for bi-directionality (left/right versus right/left strings).

Plugin Class

Specifies the qualified name of a plug-in class to be invoked by the Db2 Web Query Servlet. By default, this variable is set to ibi.webfoc.WFEXTDefault, which is the default plug-in supplied with Dd2 Web Query that contains several useful functions.

Reference: Diagnostics/Tracing Settings

Diagnostics/Tracing Settings determine specific features about system tracing and logging operations for your installation of Web Query.

Test Pages

Enables a page for testing HTTP requests and for testing RESTful web services. This check box is selected, by default. You may wish to disable this page in a production environment.

The URLs for the HTTP request test page are:

`http://host:port/context_root/WFServlet?IBFS1_action=TEST`

and

`http://host:port/context_root/WFServlet?IBFS1_action=TEST1`

Automatic session trace level

Establishes the default trace level for Web Query Sessions. The session trace level assigned to this setting appears, by default, in the Tracing Level list fields on the main page of the Session Viewer. Trace levels identify the level of events captured in a trace file. They range from Basic, which only captures traces of high level events, to Server, which captures traces of all events. Administrators can override this default value for individual sessions. By default, this value is set to Off, meaning that no traces are captured.

Default options for FEX tracing

Establishes the default level of echo traces and SQL Traces captured from the execution of FEX file commands. In a FEX file, the &ECHO variable displays command lines as they execute, in order to test and debug procedures. The level of traces captured from all SQL request and response events. This value is set to Echo On, SQL On, by default, activating both Echo and SQL tracing for an FEX file. Administrators can override this value with any of the other setting combinations identified in the list.

Enable javascript error reporting

Activates the display of JavaScript error messages in the event.log file and the Session Viewer. Values in this setting are:

- **On.** Adds entries recording JavaScript errors to the event.log file and captures them in the Session Viewer and in the Session Monitor. This is the default setting.
- **Off.** Disables the logging feature. However, when using the Session Viewer, JavaScript errors are still added to traces in the Session Viewer and as entries in the event.log file.
- **Never.** Disables this feature entirely.

As a best practice, we recommend the inclusion of JavaScript errors in the event.log file and in Session Viewer traces.

Log all URLS when completed

Establishes the default level of URL request message logging for all sessions. All URL request log entries are posted to the requests log file, located on the Log Files page of the Diagnostic tab in the Administration Console. Administrators can override this default value for individual sessions, by selecting a different log level in the requests entry of the Log Files page. Values in this setting are:

- **Off.** Does not log URL request events. This is the default setting.

- **On.** Logs all URL request events. Log entries for HTTP Post messages do not include data.
- **Full.** Logs all URL request events. Log entries for HTTP Post messages include data delivered with the Post request.

Web Services SOAP Detail

Displays detailed error messages in the SOAP XML response. This check box is selected, by default. If cleared, this setting suppresses details that administrators may not want to disclose to the end user.

Reference: ESRI Settings

ESRI settings define the connection to the local application that supports Esri-based maps.

ESRI On Premise

Identifies the path to the internal ArcGIS JavaScript API Source used to develop Esri-based maps for Web Query. This setting is blank, by default, meaning that the use of an internal source is not activated. To activate the use of an internal ArcGIS JavaScript API to develop Esri maps, type the path to it in this setting, typically, /web_resource/arcgis_api.

The default API that should be referenced by this setting is the ArcGIS API for JavaScript, version 3.15, which can be found at *https://js.arcgis.com/3.15/*. The ArcGIS JavaScript API zip file is available for download from *https://developers.arcgis.com/downloads/*.

For more information about the Esri ArcGIS Javascript API, see *https://developers.arcgis.com*.

Reference: Other Settings

Other settings determine miscellaneous configuration settings.

Enable OLAP

Enables OLAP settings and functionality. When this check box is selected, OLAP functionality appears in the following location:

- **InfoAssist.** On the Auto Drill and Analysis menu: All OLAP-related features including the OLAP Options panel, OLAP panel, OLAP Ribbon, and OLAP Reports.

This check box is not selected, by default.

Reference: Parameter Prompting Settings

Parameter Prompting settings determine parameter prompting behavior in Web Query.

Managed Reporting

Enables or disables parameter prompting for all Managed Reporting requests. Possible values are:

- **Off.** Turns off parameter prompting at the site level.
- **Run with Default Values (XMLRUN).** Prompts for amper variables that were created with the -DEFAULT command when there is another amper variable that does not have a value assigned. This is the default value.
- **Always Prompt (XMLPROMPT).**Prompts for amper variables that were created with the -DEFAULT command and any other amper variable that does not have a value.

Managed Reporting when Prompt Parameters Property Unset

Enables or disables parameter prompting for Managed Reporting procedures (FEXes) when Managed Reporting (IBIMR_PROMPTING) is set to Always Prompt (XMLPROMPT) or Run with Default Values (XMLRUN), and the Prompt for Parameters check box is not selected in the FEX Properties dialog box. Possible values are:

- **Off.** Turns off parameter prompting.
- **Run with Default Values (XMLRUN).** Prompts for amper variables that were created with the -DEFAULT command and any other amper variable that does not have a value. This is the default value.
- **Always Prompt (XMLPROMPT).** Prompts for amper variables that were created with the -DEFAULT command when there is another amper variable that does not have a value assigned.

Self Service

Enables or disables amper auto prompting. Possible values are:

- **Off.** Turns off auto prompting. This is the default value.
- **Run with Default Values (XMLRUN).** Prompts for amper variables that were created with the -DEFAULT command and for any other amper variable that does not have a value.
- **Always Prompt (XMLPROMPT).** Only prompts for amper variables that were created with the -DEFAULT command when there is another amper variable that does not have a value assigned and, therefore, will be prompted for.

- **Display XML (Debug with syntax error checking) (XML).** Displays the XML document describing the amper variables in the browser. This setting is used internally, and is recommended for debugging and syntax error checking purposes only.
- **Display XML (Debug) (XMLCHECK).** Displays the XML document describing the amper variables in the browser. This setting is used internally, and is recommended for debugging purposes only.

Note: Managed Reporting uses a separate variable setting, which is IBIMR_PROMPTING.

Preselect all values for static list controls

Activates the automatic selection of all values in Responsive Autoprompt multiselect static selection list parameters at runtime, by default.

If this check box is selected (TRUE), Responsive Autoprompt selection list parameters that contain multiselect static lists are automatically assigned FOC_ALL as their initial selection value, by default, causing these lists to automatically display all values as selected at runtime. However, if a multiselect static list designates a default value for display, that value overrides the automatic assignment of FOC_ALL as the initial selection value, and that default value is displayed as the initial selection instead.

If this check box is cleared (FALSE), parameters that contain multiselect static lists are not automatically assigned FOC_ALL as the initial selection value, by default, and all items within the list are not selected automatically at runtime. If a multiselect static list contains a designated default value, that value is displayed, by default. To include all values from the static selection list in a query, a user must manually select the All Values option or individually select all values in the list.

This check box is cleared (FALSE), by default.

Default Autoprompt Template

Specifies the template that defines the layout of the autoprompt interface.

- **Designer.** Specifies the use of the Designer Autoprompt implementation and the Designer Autoprompt template. In this template, the Autoprompt interface uses the Designer page format. This is the default value.
- **Responsive.** Specifies the use of the responsive implementation and the autoprompt_jqm.jsp template.
- **HTML Top.** Specifies the use of the HTML-based implementation and the autoprompt_top.html template, which displays parameters horizontally at the top of the page.

- **HTML Top Checked.** Specifies the use of the HTML-based implementation and the autoprompt_top_checked.html template. In this template, the Run in a new window check box is selected, specifying that all reports open in a new window, by default.

Null Behavior

Specifies the value (_FOC_NULL or FOC_NONE) that the client assigns to the amper variable when the dynamic multi-select list *No Selection* value is selected. The default value is _FOC_NULL.

Auto Describe

Activates automatic indexing of report and chart parameters. If this check box is selected (TRUE), when users save reports or charts, Web Query automatically indexes the parameters on which they are based, making information about these parameters immediately searchable, and delivering more timely and comprehensive search results.

This check box is selected (TRUE), by default.

Reference: Db2 Web Query Spreadsheet Client Settings

The Spreadsheet Client settings determine how Spreadsheet Client performs authentication.

Security

Specifies the type of sign in used by Db2 Web Query Spreadsheet Client. Permitted values are *Reporting Server* and *Managed Reporting*. The default value is *Managed Reporting* (MR) and should not be changed.

Form Only

Applies when MR authentication is selected for the Security setting. Permitted values are:

- **Yes.** Users may not create their own reports using InfoAssist+, but may only use predefined ad hoc forms.
- **No.** Users may use predefined ad hoc forms or create their own reports, using InfoAssist+. The default value is No (clear check box).

Reference: Security

Security settings govern authentication for the Web Query environment.

Enable Password Change

Allows users to change their Web Query user ID password. The default is selected.

Sign-out URL

Defines the URL to which a user ID is redirected to on sign out of Db2 Web Query. The default is /, which redirects the user to the Db2 Web Query Sign in page.

For Kerberos configurations, set the URL to logon/logoff.jsp or to another preferred URL, rather than the default of /.

Changing Web Query Client Settings in Web Query

The client configuration settings are grouped into categories under the Configuration menu in the Administration Console. The term *Initial Value* next to a setting means that the value shown initially is the installation default value and that it can be overridden by setting the variable explicitly in the URL request.

Understanding Custom Settings

The Custom Settings page allows you to customize your installation of Web Query by typing customized values for standard settings.

When you save updates to settings that you type into the Customized Setting text box, they are transferred to the site.wfs file, located in the /qibm/UserData/qwebqry/base80/client/wfc/etc directory. When you use this page to assign new values to settings, they override the default values assigned to them. These overrides are carried over as you upgrade to new versions.

After you save a custom setting, the text continues to display on this page. You can use comments to identify specific updates and additional information about them.

Procedure: How to Configure Custom Settings

Only an administrator can configure settings on the Custom Settings page.

1. In the Administration Console, on the Configuration tab, click *Custom Settings*.
2. Under the final comment statement at the top of the Custom Settings text box, or the most recent custom setting entry, type the variables, settings, commands, or comments that comprise the custom settings.

   Use the format required by the application or operating system that will execute the command.

   To help track changes to custom settings, use comments to identify and separate individual changes.
3. To store your custom settings in an encrypted format, select the *Encrypt* check box.

   Note: Even when you select this check box, settings continue to appear in an unencrypted format in the Custom Settings text box.

4. When your configuration is complete, click *Save*.
5. When you receive a confirmation message, click *OK*.
6. When the Custom Setting page clears, click *Custom Settings* under the Application Settings folder to see your updated comments, settings, or commands in the Custom Settings text box.

Customizing the Dynamic Language Switch

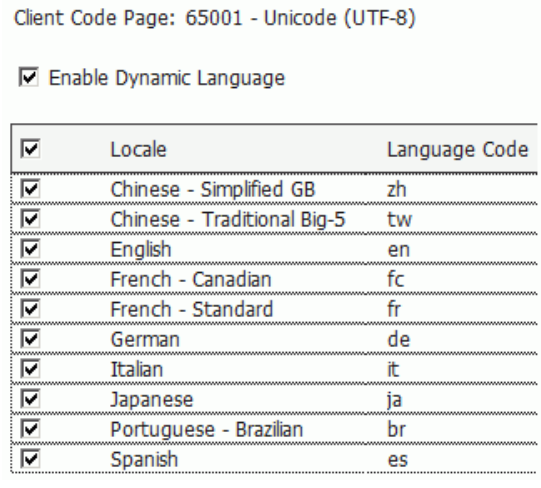
You can customize the languages that are made available on Sign in pages by activating the Dynamic Language Switch.

Procedure: How to Customize the Dynamic Language Switch

1. In the Administration Console, on the Configuration tab, under the Application Settings folder, click *Dynamic Language Switch*.

   The Dynamic Language Switch page opens with a list of the languages made available by the code page selection in the National Language Support page. By default, the Enable Dynamic Language check box is not selected and all of the language check boxes are deactivated.

2. Select the *Enable Dynamic Language* check box to activate the check boxes for all of the available languages displayed in the panel, as shown in the following image.



   Selecting the Enable Dynamic Language check box and one or more languages activates the display of the Language menu on all of the Sign in pages.

3. Select the check box next to each of the languages that you want to appear on the Sign in pages and in the Language menu.

4. Select the check box in the Locale heading if you want all of the languages to appear in the Language menu on the Sign in pages.
5. Click *Save*.
6. When you receive the Successfully Saved message, click *OK*.

Note: To remove languages from the Language menu on the Sign in pages, clear the check boxes next to the languages you want to remove.

Understanding Redirection Settings

You can view or edit redirection settings for the Db2 Web Query Client though the Redirection Settings page of the Administration Console. However, you should not alter Redirection Settings without consulting Support.

Redirection settings allow users to save report output in a temporary directory when a request is executed. Then, the browser makes an HTTP call to retrieve the temporary stored output for display.

If redirection is turned off, the report output displays in the browser immediately after the request is executed.

To change redirection settings in the Administration Console, on the Configuration tab, click *Redirection Settings*. The Redirection Settings panel opens, as shown in the following image.

Redirection Settings

WebFOCUS Extension	Content Type	Format	Redirect	Server Extension	Save Report	Client Extension	IBFS Format
.acx	text/plain	ascii	no	ACCESS	no	.acx	ascii
.bmp	image/bmp	binary	no	BMP	no	.bmp	binary
.cfg	text/cfg	ascii	no	N/A	no	.cfg	ascii
.class	java/*	binary	no	N/A	no	.class	ascii
.css	text/css	binary	no	CSS	no	.css	ascii
.csv	application/csv	ascii	yes	N/A	no	.csv	ascii
.dif	application/x-dif	ascii	yes	N/A	no	.dif	ascii
.doc	application/msword	ascii	yes	DOC	no	.doc	ascii
.docx	application/vnd.openxml	binary	no	DOCX	no	.docx	binary
.e97	application/vnd.ms-excel	ascii	no	N/A	no	.e97	ascii
.err	text/plain	ascii	no	ERRORS	no	.err	ascii
.fex	text/plain	ascii	no	FOCEXEC	no	.fex	ascii
.foc	application/foc	binary	no	FOCUS	no	.foc	binary
.for	text/plain	ascii	no	N/A	no	.for	ascii
.ftm	application/x-ftm	ascii	no	FOCTEMP	no	.ftm	ascii
.gfa	application/gfa	binary	no	N/A	no	.gfa	binary
.gif	image/gif	binary	no	GIF	no	.gif	binary
.hex	text/plain	ascii	no	N/A	no	.hex	ascii

Procedure: How to Change Redirection Settings

1. In the Administration Console, on the Configuration tab, click *Redirection Settings*.
2. In the Redirect column, select *yes* on a row to redirect the output to a temporary directory for the specified extension.
3. In the Save Report column, select *yes* to prompt users in the browser to open or save report output. When Save Report is set to *yes*, the report output retains the Save As name, if specified in the request.

   For example, specifying ON TABLE PCHOLD AS MYREPORT FORMAT PDF in a request and setting Save Report to *yes* for the .pdf extension enables a user to open or save the output as MYREPORT.pdf. The Save As name specified is returned to the browser in uppercase. If Save Report is set to *yes* and no Save As name is specified in the request, a random file name is generated.

Important: You must do the following to use the Save Report functionality for GRAPH requests (specified with a PNG, SVG, GIF, JPEG, or JPG format in the procedure):

- Set Save Report to *yes* for the .htm Extension.

  Running a server-side GRAPH request creates an HTM file that contains a link to the actual graph output, which is stored as a temporary image file with a .jpeg, .jpg, .gif, .svg, or .png extension.

- When you execute a GRAPH request, if you select the *Save* option when prompted to open or save the output, the output is saved to an HTM file using only a reference to the graph image, which will eventually expire and be deleted from the server (according to the temporary file expiration settings in the Client Configuration).

- To preserve the output of the GRAPH request, open the saved HTM file, right-click the graph image, and select *Save Picture As* to save it to disk permanently. You can then substitute an absolute reference to the saved image file in the returned HTM output file.

4. If you want to encrypt the redirection settings, select the *Encrypt* check box at the bottom of the screen.
5. Click *Save* to save your changes in the Redirection Settings panel.

InfoAssist Properties

Settings in the InfoAssist Properties page of the Administration Console determine the display and use of features in the InfoAssist tool that opens when creating or updating content.

To open the InfoAssist Properties page, in the Administration Console, scroll down to the bottom of the Configuration tab menu, and then click *InfoAssist Properties*. You can then enable or disable options for the InfoAssist tool.

Reference: Understanding InfoAssist Home Tab Properties

The InfoAssist Home tab enables you to control the most commonly used properties and options from the Home tab. These properties are:

Use Live Preview Mode

Determines whether InfoAssist opens in the Live Preview mode or the Query Design View, by default. When *Yes* is selected, InfoAssist opens in the Live Preview mode as the default. When *Yes* is not selected, InfoAssist starts with the Query Design View. If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Record Limit

Enables the Record Limit menu of the Home tab. If *Show* is not selected, the Record Limit menu is removed from the InfoAssist interface.

Themes

Provides InfoAssist users with various color-coded StyleSheet themes that can be used to style reports and charts. Users can select standard themes, or select customized cascading style sheet themes created by your organization.

Page Heading

Enables the Header & Footer menu of the Home tab. This menu can be used to add a heading or footing to each page of the report output.

Report Heading

Enables the Header & Footer menu of the Home tab. This menu can be used to add a heading or footing to the first page of the report output.

Reference: Understanding InfoAssist Format Tab Properties

For reports or charts, InfoAssist displays a list of output file format options, such as HTML, PDF, or Excel, in the Format Group of the Home tab. Other options that make additional layouts and display features available when creating a report or chart appear on the Format tab itself. You can control the display of both types of options through the settings contained in this section.

Note: Settings in this section do not affect the display of Format tab features for visualizations.

PDF Analytic Document Format

Enables the use of the PDF Analytic Document Format in InfoAssist. This format adds the portability and interactive enhancements of In-Document Analytics to PDF reports. The resulting output is designed for offline analysis and includes all of the data and JavaScript tools required to support analytic operations such as filtering, sorting, and charting in a self-contained report.

When this check box is selected, this format is available as an option in the Output File Format list that opens from the Format group of the InfoAssist Home Page ribbon. It is also available for selection as a default output format from the Report Output Format list, the Chart Output Format list, and the Document Output Format list in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

This check box is cleared, by default.

HTML Analytic Document Format

Enables the use of the HTML Analytic Document Format in InfoAssist. This format adds the portability and interactive enhancements of In-Document Analytics to HTML reports. The resulting output is designed for offline analysis and includes all of the data and JavaScript tools required to support analytic operations such as filtering, sorting, and charting in a self-contained report.

When this check box is selected, this format is available as an option in the Output File Format list that opens from the Format group of the InfoAssist Home Page ribbon. It is also available for selection as a default output format from the Report Output Format list, the Chart Output Format list, and the Document Output Format list in the Tool Options Dialog Defaults section of the InfoAssist Properties page

This check box is selected, by default.

Additional HTML Formats for Chart

Enables the use of the PNG, JPEG, GIF, and SVG output formats. The default value is PNG. PNG is not available as a format for chart output.

Additional PDF Formats for Chart

Enables the use of the PDF/SVG and PDF/GIF output formats. The default value is PDF/SVG.

Excel 2000 Format

Enables the use of the Excel 2000 spreadsheet output format. The Excel 2000 format supports most StyleSheet attributes, allowing for full report formatting. The computer on which the report displays must have Microsoft Excel 2000 installed.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section.

This check box is selected, by default.

Excel 2000 Formula

Enables the use of the Excel 2000 formulas when the *Excel 2000 Format* option is selected.

This check box is selected, by default.

Excel 2007 Format

Enables the use of the Excel 2007 spreadsheet output format. The computer on which the report displays must have Microsoft Excel 2007 installed.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

This check box is selected, by default.

Excel 2007 Formula

Enables the use of the Excel 2007 formulas when the *Excel 2007 Format* check box is selected.

This check box is selected, by default.

Excel Pivot

Enables the use of the Excel 2000 PivotTable output format. PivotTable is an Excel tool for analyzing complex data.

This check box is not selected, by default.

Excel CSV

Enables the use of the comma separated values (CSV) file format.

When this check box is selected, the Excel CSV format option is available for use in InfoAssist, and it appears on the *Home* tab in the Format group options list under the Excel format option. When it is cleared, this option is not available, and it does not appear in the Format group options list.

This check box is selected, by default.

HTML Format

Enables the use of the HTML page report format.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

InfoMini Run Immediate

If *Enable* is selected, reports run immediately when InfoMini first launches. This setting is enabled, by default.

Other Chart Types

Allows the creation of more complex graph output types, such as spectral maps, gauge charts, and Pareto charts.

Pages on Demand

Enables the display of report output one page at a time. Users can use the navigation menu at the bottom of the output screen to view each page. This option is activated only when HTML or active report output format is selected.

PDF Format

Enables the use of the PDF report format.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

PowerPoint 2000 Format

Enables the use of the PowerPoint® 2000 document output format. The computer on which the report appears must have Microsoft PowerPoint 2000 or higher installed.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

PowerPoint 2007 Format

Enables the use of the PowerPoint® 2007 document output format. The computer on which the report appears must have Microsoft PowerPoint 2007 or higher installed.

When this check box is selected, this output format option is available for use when selected from the Output Format drop-down menus in the Tool Options Dialog Defaults section of the InfoAssist Properties page.

Stack Measures

Displays all numeric measure field names in the first column of the report output, with the corresponding numeric data values displayed across time in a column for each selected time period. The Stack Measures feature is activated only when HTML, Excel, or PowerPoint output format is selected.

User Selection

Allows users to change the output type of their reports at run time.

Reference: Understanding InfoAssist View Tab Properties

Enables InfoAssist users to customize the view of different report components in the InfoAssist tool, such as the design mode, output location, and data view. You can configure the following properties in the InfoAssist View tab:

Display View Tab

Enables the View tab and all of its menu options. If this is not selected, the View tab is removed from the InfoAssist interface.

Data Panel

Allows the user to customize Data Panel settings. Values are *Logical* (default), *List*, and *Structured*.

Query Panel

Allows the user to customize the view of the query components, such as Filters, Column and Row labels, and Measures when building a report. Values are *Tree* (default), *Area 2x2* (2 columns by 2 rows), *Area 1x4* (1 column by 4 rows). If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Reference: Understanding InfoAssist Tool Options Dialog Defaults Properties

Settings in the Tool Options Dialog Default section enable administrators to specify default tool settings. If the *Allow User Override* check box is selected for an option, users can change the setting specified by the administrator. However, the administrator cannot specify a default value that has already been disabled in one of the other groups. For example, if you have disabled the PDF Analytic Document Format option in the Format Tab section, you will receive an error message if you attempt to set that format as a default Report, Chart, or Document Output Format in the Tools Options Dialog Defaults section.

Report Output Format

Sets the default format for reports. Valid values are *HTML*, *HTML Analytic Document*, *PDF*, *PDF Analytic Document*, *EXL07*, *EXL2K*, *PowerPoint 2000*, and *PowerPoint 2007*. The format options in this list are available only when their corresponding check box is selected in the Format Tab section of the InfoAssist Properties page. If that check box is cleared, you receive a message warning you that the format option is not enabled when you select it from this list. The default value is *HTML*.

Chart Output Format

Sets the default format for charts. Valid values are *HTML*, *HTML5*, *HTML Analytic Document*, *PDF*, *PDF Analytic Document*, *EXL07*, *EXL2K*, *PowerPoint 2000*, and *PowerPoint 2007*. The format options in this list are available only when their corresponding check box is selected in the Format Tab section of the InfoAssist Properties page. If that check box is cleared, you will receive a message warning you that the format option is not enabled when you select it from this list. The default value is *HTML5*.

Document Output Format

Sets the default format for documents that are generated in . Valid values are *HTML*, *HTML Analytic Document*, *PDF*, *PDF Analytic Document*, *EXL07*, *EXL2K*, *PowerPoint 2000*, and *PowerPoint 2007*. The format options in this list are available only when their corresponding check box is selected in the Format Tab section of the InfoAssist Properties page. If that check box is cleared, you will receive a message warning you that the format option is not enabled when you select it from this list. The default value is *PDF.*

Page Orientation

Sets the default page orientation for reports and charts. Valid values are *Portrait* and *Landscape*. The default value is *Portrait.* If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Page Size

Sets the default page size for reports and charts. Valid values are *A3*, *A4*, *A5*, *Letter*, *Tabloid*, *Legal*, *PPT-SLIDE*, and *Large Size*. The default value is *Letter*. If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Data Preview Method

Sets the default action for whether reports are previewed using sample data or actual data from the data source. Valid values are *Live* and *Sample*. The default value is *Live*. If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Record Limit

Sets the default maximum number of rows retrieved from the data source when Interactive Design view is selected. This feature is useful in reducing response time if users are working with a large amount of data. It is applicable only when developing the report. The record limit setting will not affect the report output at run time. Valid values are, *All, 1, 10, 50, 100, 500, 1000, 2000, 5000, 10000* rows. The default value is *500* rows. If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Output Target

Sets the default location for reports and charts. Valid values are *Single tab*, *New tab*, *Single window*, and *New window*. The default value is *Single tab*. If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

In-Document Analytics

Sets the default value for the In-Document Analytics setting in the Procedure Settings dialog box, which opens from the InfoAssist Quick Access toolbar. Valid values are Designer Style and Legacy. In the InfoAssist Properties page setting, the Designer Style value is selected, by default.

The value assigned to this setting determines the default interface for InfoAssist to use when running reports, charts, and documents based on the HTML Analytic Document format. When users create new HTML Analytic reports, charts, and documents in InfoAssist, they can override the default value established in the InfoAssist Properties page setting by selecting an alternative option from the In-Document Analytics setting that appears in the Procedure Settings dialog box.

InfoAssist/Portal StyleSheet

Sets the StyleSheet to be used for InfoAssist and the Portal. Click *Change Stylesheet* to open the Browse predefined template files window. The value displayed, by default, is *Warm.sty*.

If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Visualization StyleSheet

Sets the StyleSheet to be used when creating visualizations. Click *Change Stylesheet* to open the Browse predefined template files window. The value displayed, by default, is *Warm.sty*.

If the *Allow User Override* check box is selected for this option, users can change the setting specified by the administrator.

Encode HTML

Encodes script tags within data, so that the tags are replaced and not executable in a browser. The default value is Yes. This includes the ON TABLE SET HTMLENCODE ON command in the procedure.

Enable Pages On Demand

Allows InfoAssist users to view report output one page at a time. The user can use the navigation menu at the bottom of the output screen to view each page. This option is activated only when HTML or active report output format is selected.

Rows retrieved from cache

Establishes how many rows of cached data stored in a binary file are returned to the output window at one time. The default value is 100 rows.

HTML Freeze Height

Determines how the Freeze option, located on the *Format* tab in the *Navigation* group of the InfoAssist ribbon, automatically freezes the height of a report area.

If the AutoFit value is assigned to this setting, reports produced when the Freeze option is selected automatically fit the height of the window or pane in which they appear. This is the default value.

If the Fixed value is assigned to this setting, reports produced when the Freeze option is selected are set automatically to a fixed height of four inches, regardless of the size of the window or pane in which they appear.

HTML Accordion

Determines whether the Accordion option, located on the *Format* tab in the *Navigation* group of the InfoAssist ribbon, displays accordion reports that automatically resize data to fit the container in which they appear.

If the AutoFit value is assigned to this setting, reports produced when the Accordion option is selected automatically resize the display of data to fit the size of the container in which they appear, and automatically adjust column widths based on the size of the largest data value or column title. This is the default value.

If the legacy value is assigned to this setting, reports produced when the Accordion option is selected do not automatically resize the display of data to fit the size of the container in which they appear, and do not automatically adjust column widths.

Enabling the Cache Through Global Preferences

In InfoAssist, the cache option enables you to send only the first page of report output using the Analytic Document Format to the browser and retrieve subsequent pages from a temporary cache on the InfoAssist. You can enable the cache locally through the Advanced tab of the Analytic Document Options dialog box in InfoAssist. You can enable the cache option globally by configuring the relevant InfoAssist Properties settings in the Administration Console.

Procedure: How to Enable the Cache Through InfoAssist Properties

You can globally enable the cache for InfoAssist by using settings in the Administration Console, as described in the following steps:

1. Open the Administration Console.
2. On the Configuration tab, click *InfoAssist Properties*.
3. On the InfoAssist Properties page, under the Tool Options Dialog Defaults section:
   a. Select the *Yes* checkbox, in the Enable Pages On Demand setting.
   b. Accept the default value of 100 in the Rows retrieved from cache setting, or type an alternative value that conforms to your requirements.
4. At the bottom of the page, click *Save*.
5. When you receive a message that the changes were saved successfully, click *OK*.
6. Close the Administration Console.

Procedure: How to Validate the Cache Configuration

You can confirm that uses the global settings you configure in the Administration Console, as described in the following steps:

1. Open to create a new report or edit an existing report.
2. On the *Home* tab, in the *Format* group, click the *Output File Format* list, and then click *HTML Analytic Document* or *PDF Analytic Document*.
3. Click the *Format* tab.
4. In the Navigation group, confirm that the *Pages on Demand* option is highlighted.
5. In the Features group, click *Analytic Document Options*.
6. In the Analytic Document Options dialog box, click *Advanced*.
7. Compare the value in the *Rows Retrieved* field to the value you accepted or typed in the *Rows retrieved from cache* setting in the Administration Console.

   If the two values are a match, the Administration Console configuration update was a success. If they do not match, review your configuration of the Administration Console setting.

Reference: Understanding InfoAssist File Options

Determines which of the following file types can be selected by users when creating and saving HOLD files:

Binary

Stores report or chart data as binary numbers in numeric fields. Binary files use the extension (*.ftm).

FOCUS

Stores report or chart data as text in a segment structure that conforms to FOCUS database requirements. FOCUS files use the extension (*.foc).

Comma Delimited with Titles

Stores report or chart data as text in sequence by field. Alphanumeric fields are enclosed in quotation marks. Fields are separated by commas and are preceded by Field Names. Comma Delimited with Titles files use the extension (*.csv) (Comma Separated Values).

Plain Text

Stores report or chart data as text in sequence by field without delimiters or field names. Plain Text files use the extension (*.ftm).

Tab Delimited

Stores report or chart data as text in sequence by field. Fields are separated by tab characters. Tab Delimited files use the extension (*.tab).

Tab Delimited with Titles

Stores report or chart data as text in sequence by field. Fields are separated by tab characters, and are preceded with field names. Tab Delimited with Titles files use the extension (*.tab).

Database Table

Stores report or chart data as text in a field structure that conforms to a Structured Query Language (SQL) Database format. Database Table files use the extension (*.sql).

Database Table output is only available when working against an SQL database.

Hyperstage

Stores report or chart data as text in a field structure that conforms to the Hyperstage database table format. Hyperstage files use the extension (*.bht).

Hyperstage output is only available when the has a Hyperstage adapter configuration.

SQL script

Stores report or chart data as text in a sequential field structure that can be imported into a database table that conforms to the Structured Query Language (SQL) Database format. SQL Script files use the extension (*.sql).

SQL Script output is only available when working against an SQL database.

XML

Stores report or chart data as text in a field structure that conforms to the rules of the Extensible Markup Language. Fields are separated by tags that identify content. XML files use the extension (*.xml).

JSON

Stores report or chart data as text in a structure that conforms to the rules of JavaScript Object Notations. JSON files use the extension (*.json).

Reference: Understanding InfoAssist Chart Type Options

Leaflet Maps

Enables the icons required for the use of Leaflet maps in both chart and visualization mode of InfoAssist. The two Leaflet map icons enable you to select either a Choropleth or a Proportional Symbol (Bubble) map based on the Leaflet open-source JavaScript library for mobile-friendly interactive maps.

In chart mode, these icons are available in the Select a chart dialog box. To open this dialog box, click *Other* on the Format tab, in the Chart Types group. In the Select a chart dialog box, click *Map*.

In visualization mode, these icons are available in the Select a Visual dialog box. To open this dialog box, click *Change* on the Home tab, in the Visual group.

If this setting is not selected, Leaflet map icons do not appear in either location. The default value is selected.

Reference: Understanding InfoAssist Auto Drill Properties

Settings in this section enable the use of drill-down navigation options, which are part of the Auto Drill functionality.

Single Click Navigate

Enables the use of single click navigation, which is an automatic drill down to the next level of a dimension within the body of a report or chart made in response to a single click on a top-level entry or feature.

By default, this check box is not selected, meaning that single click navigation is disabled, and top-level Auto Drill entries or features display the Drilldown menu in response to a single click. If this check box is selected, single click navigation is enabled, and instead of displaying the Drilldown menu, top-level Auto Drill entries or features automatically refresh the report or chart with results based on the next lower level of your selected dimension in response to a single click.

Breadcrumbs

Enables the display of a breadcrumb trail at the top of an Auto Drill report or chart.

By default, this check box is selected, and Auto Drill reports and charts display a breadcrumb trail. If this check box is cleared, Auto Drill reports and charts do not display a breadcrumb trail.

In an Auto Drill report or chart, a breadcrumb trail displays a series of links to previous versions that were generated as you drilled through each level of your selected dimension to reach the version currently on display.

Restore Original

Enables the display of the Restore Original option in the Drilldown menu.

By default, this check box is selected, and the Restore Original option appears in the Drilldown menu. If this check box is cleared, the Restore Original option does not appear in the Drilldown menu.

In an Auto Drill report or chart, the Restore Original option returns you directly to the original version.

Drill Up

Enables the display of the Drill up option in the Drilldown menu.

By default, this check box is selected, and the Drill up option appears in the Drilldown menu. If this check box is cleared, the Drill up option does not appear in the Drilldown menu.

In an Auto Drill report or chart, the selection of the Drill up option refreshes the display with results based on the next level above the current level of your selected dimension.

Drill Down

Enables the display of the Drill down option in the Drilldown menu.

By default, this check box is selected, and the Drill down option appears in the Drilldown menu. If this check box is cleared, the Drill down option does not appear in the Drilldown menu.

In an Auto Drill report or chart, the selection of the Drill down option refreshes the display with results based on the next level below the current level of your selected dimension.

Note: In addition to disabling the Drill down option, clearing this setting also removes hyperlinks from top level report entries and the breadcrumb trail display from reports and charts. If the Single Click Navigate setting is also cleared, clearing the Drill Down setting effectively disables Auto Drill navigation tools in reports and charts that contain only the top level of a dimension value in their design. If the Single Click Navigate setting is selected, and the report or chart contains entries below the top level, clearing the Drill Down setting shifts the Single Click Navigation feature to those lower-level entries. However, because this setting also suppresses the display of the Drilldown menu, users will neither be able to restore the original version of the report or chart, nor will they be able to drill back up to a higher level.

Reference: Understanding InfoAssist Miscellaneous Options

Use two-part file name

If selected, this option requires the use of two-part file names, which specify the path to the Master File location. If not selected, a one-part file name must be used instead. The default value is selected.

Expand Data Source Tree

Determines whether the initial view of the data source tree is expanded or collapsed. If selected, the tree is expanded. If not selected, the tree is collapsed. The default value is selected.

Join Tool

Displays the Join menu option on the InfoAssist Data tab. If not selected, the Join menu option is removed from the Data tab. The default value is selected.

Layout Tab

Enables the Layout tab in the InfoAssist ribbon. If not selected, the Layout tab is removed from the InfoAssist ribbon. The default value is selected.

Series Tab

Enables the Series tab in the InfoAssist ribbon. The Series tab displays when working with charts and visualizations. It provides access to charting properties and options in the Properties, Line, and Pie menus. If not selected, the Series tab is removed from the InfoAssist ribbon. The default value is selected.

Enable Path Enforcement

Establishes the default condition of the Enforce Paths container  that appears at the top of the Data pane of the Resources panel in the InfoAssist Application Window.

When you move a field from the Data pane into a field container on the Query pane, path enforcement automatically limits the display of available fields in the Data Source Tree to those with valid logical connections, based on their multi-path relationships, to the field that moved into the field container.

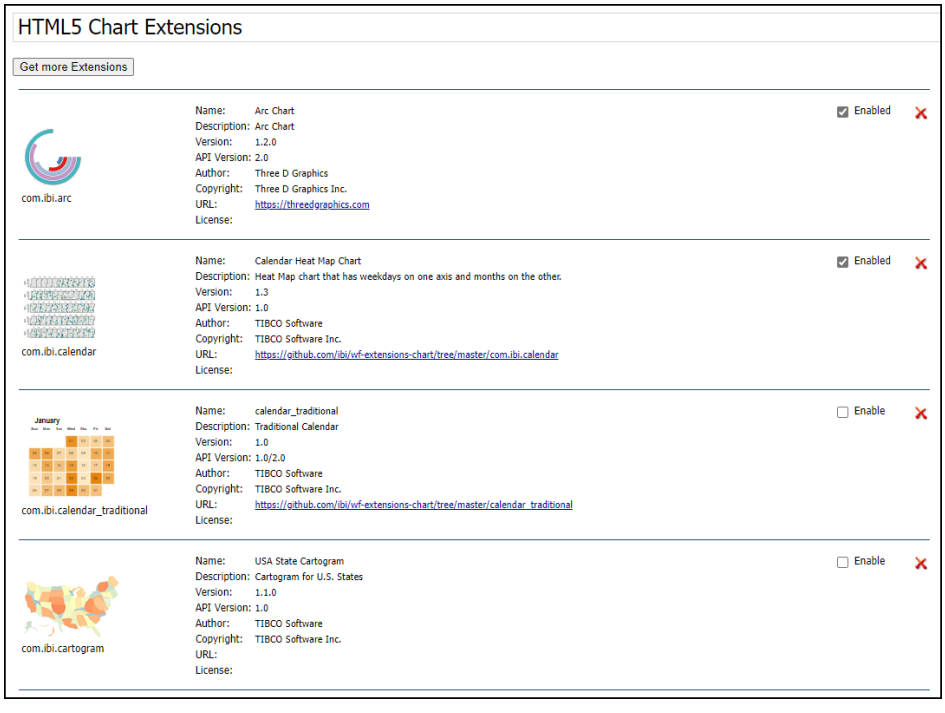
When this check box is cleared, the default value for this setting, the Enforce Paths container is not enabled, by default. Under this condition, the display of available fields in the Data Source Tree does not change when users move a field into a field container in the Query pane. Within the InfoAssist session, users can click the Enforce Paths container to enable path enforcement.

When this check box is selected, the Enforce Paths container is enabled, by default. Under this condition, fields in the Data Source Tree with no logical connection to a field moved into a field container in the Query pane are dimmed and unavailable. Within the InfoAssist session, users can click the Enforce Paths container to disable path enforcement.

Note: When you save a new procedure, the current condition of the Enforce Paths container is saved with the procedure. When you re-open the procedure in the InfoAssist Application Window, the condition of the Enforce Paths container is established by the value stored in the procedure instead of the value assigned to the Enable Path Enforcement setting.

Working With HTML5 Chart Extensions

The HTML5 Chart Extensions page contains all currently installed HTLM5 chart extensions, as shown in the following image.

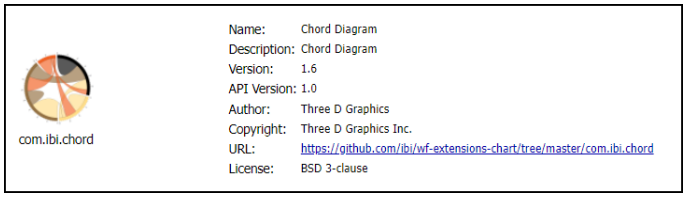


HTML5 chart extensions expand the standard set of charts to include customized charts tailored to very specific reporting and data visualization requirements.

Features on this page allow you to upload HTML5 chart extensions, enable or disable their use, and uninstall them when no longer needed.

Understanding HTML5 Chart Extension Entries

Each HTML5 Chart Extension entry contains details that identify a chart extension and its origin, and help you determine if a chart extension is appropriate.



Each entry identifies an HTML5 chart extension with a Name, Description, Version, and API Version. These details help you identify the chart extension you want to use, and the specific version of it that best matches your requirements. The Author and Copyright identify the origin of the chart extension, and the URL links you to the location where you can retrieve additional copies. License information identifies the type of license, if any, under which the chart extension is made available to you, and helps you understand any limits on the use of the chart extension and the rights and obligations licensed users have to the developer.

Understanding the HTML5 Chart Extensions Enable/Enabled Check Box

Every HTML5 Chart Extension entry includes the Enable/Enabled check box that indicates whether or not the chart extension is available for use. The use of this check box provides administrators with a second level of availability that enables them to restrict the full availability of HTML5 Chart Extensions to those that are in active use, while retaining all other installed HTML5 Chart Extensions in readiness for when they are needed.

When this check box is cleared, it displays the Enable label to indicate that selecting the check box will make the chart extension available for use, as shown in the following image.

HTML5 Chart Extensions that have the Enable check box selected are installed, but they are not available to users.

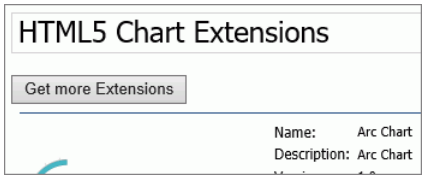
When this check box is selected, it displays the Enabled label to indicate that the chart is already available for use, as shown in the following image.

HTML5 Chart Extensions that have the Enabled check box selected are installed and are available to developers using InfoAssist+ for their use in chart creation. The files and directories included in that Chart Extension are identified as eligible for calls from InfoAssist+ and Designer. An icon for that Chart Extension is displayed in the Select a Chart menu that opens from the Other command in the Chart Type group, on the InfoAssist+ Format tab ribbon.

Note: The HTML5 Chart Extensions page does not manage copyright or license restrictions. You are ultimately responsible for the use of any HTML 5 Chart Extension you upload. Therefore, you must ensure that you have a license or permission to use any HTML5 Chart Extension before uploading it to this page.

Uploading Additional HTML5 Chart Extensions Using the Upload and Install Extensions Page

Use the Upload and Install Extensions page to install additional HTML5 Chart Extensions. To open the Upload and Install Extensions page from the main HTML5 Chart Extensions page, click *Get more Extensions*, as shown in the following image.



The Upload and Install Extensions page opens, as shown in the following image.

The Upload and Install Extensions page provides two ways to install additional HTML5 Chart Extensions:

- By clicking the *Install Extension* button Install in entries for chart extensions that are found on the Information Builders public extension GitHub page, *https://github.com/ibi/wf-extensions-chart*, but are not currently installed.
- By clicking the *Choose File* button Choose File next to Upload and Install Extension field to navigate to a folder on your local file system that contains a locally-developed HTML5 Chart Extension package in .zip file format.

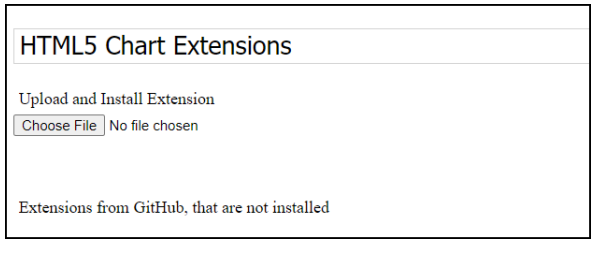
To move back to the main HTML5 Chart Extensions page from the Upload an Install Extensions page, click *HTML Chart Extensions* under the Application Settings Folder, or click the *Back* button in your browser.

Procedure: How to Upload HTML5 Chart Extensions from the Local File System

Use this procedure to upload zip files containing HTML5 Chart Extensions from your local system.

You must ensure that you have a license or permission to use any HTML5 Chart Extension before uploading it to this page.

1. Sign in as an administrator, and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, click *Get more Extensions*.
4. On the Upload and Install Extension page, click *Choose File*, as shown in the following image.



The Open dialog box opens and points to the extensions folder for your local installation. Typically, this is the following folder:

drive:\ibi*install_dir*\config\web_resource\extensions

where:

install_dir

Is your installation directory.

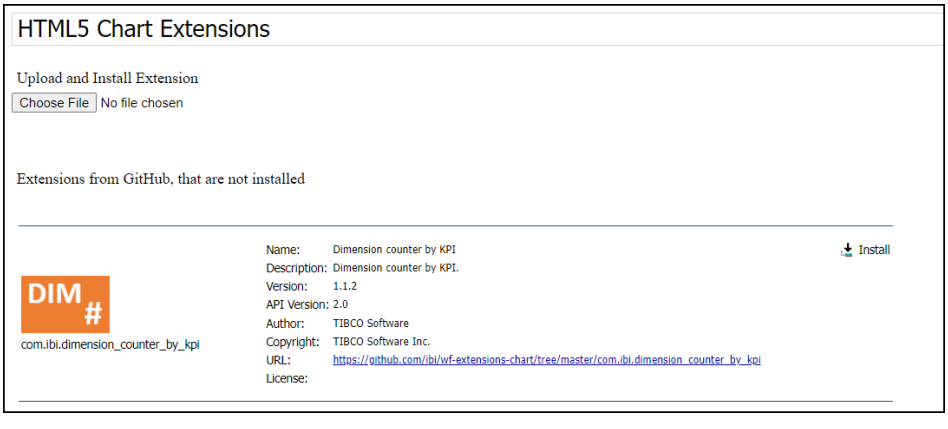
Note: If you downloaded your HTML5 Chart extension zip file to a different directory, navigate to that directory and file.

5. Click the file containing the zipped version of the HTLM5 Chart extension you want to upload, and then click *Open*.
6. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll down to the entry for the new HTML5 Chart Extension.

Procedure: How to Install HTML5 Chart Extensions From the IBI GitHub Page

Use this procedure to upload HTML5 Chart Extensions from the public IBI GitHub extension page, *https://github.com/ibi/wf-extensions-chart*.

1. Sign in as an administrator, and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, click *Get more Extensions*.
4. On the Upload and Install Extension page, review the list of extensions from GitHub that are not installed, as shown in the following image.



5. If the chart extension you want to install appears in the list, click *Install Extension* 

.
6. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll back to your entry to confirm that the chart extension is now installed.

Procedure: How to Enable an Installed HTML5 Chart Extension

When you select the Enable check box in an HTML5 Chart Extension entry, you make it available for use. You must ensure that you have a license or permission to use any HTML5 Chart Extension before making it available.

1. Sign in as an administrator, and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, scroll to the entry for the HTML5 Chart Extension that you want to enable.

   Note: You can also search for the chart extension by name, using the Find or Find on this page command that is supported by the browser.
4. Select the *Enable* check box, as shown in the following image.

5. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll back to your entry to confirm that the check box is now selected.

   An icon for the HTML5 Chart Extension appears in the Select a Chart menu, which opens when you click the Other command in the Chart Types group on the Format tab, and in the Custom section of the Content Picker, which opens from the right side of the Designer canvas.

Procedure: How to Disable an HTML5 Chart Extension

When you clear the Enabled check box in an HTML5 Chart Extension entry, you make it unavailable for use. However, the chart extension remains installed on the HTML5 Chart Extension page and can be enabled again when needed.

1. Sign in as an administrator, and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, scroll to the entry for the HTML5 Chart Extension that you want to make unavailable.

   Note: You can also search for the chart extension by name, using the Find or Find on this page command that is supported by the browser.

4. Clear the *Enabled* check box, as shown in the following image.

5. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll back to your entry to confirm that the check box is now cleared.

   The icon for the HTML5 Chart Extension no longer appears in the Select a Chart Menu that opens from the ribbon, or in the Custom section of the Content Picker, which opens from the right side of the Designer canvas.

Procedure: How to Uninstall an HTML5 Chart Extension

1. Sign in as an administrator, and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, scroll to the entry for the HTML5 Chart Extension that you want to uninstall.

   Note: You can also search for the chart extension by name, using the Find or Find on this page command that is supported by the browser.

4. Click *Delete_CHARTNAME_ Chart*, represented by the red X icon, as shown in the following image.

5. When you receive a message asking if you want to permanently delete the extension, click *Yes*.
6. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll back to your entry to confirm that the entry is now deleted.

The entry for the HTML5 Chart Extension no longer appears on the page. If the HTML5 Chart Extension was installed from the GitHub page, it now appears on the Upload and Install Extensions page and can be reinstalled from that page. If it was installed from your local file system, it does not appear on that page, and you will be required to use the Upload and Install Extension field and Browse button to reload the chart extension from your local file system.

Chapter 2

Db2 Web Query Change Management

Change management is the process of moving application components between Db2 Web Query environments of the same release level. Typically, this is done to ensure that applications have been fully tested, prior to deploying to a production environment.

There are features and methodologies within Db2 Web Query that facilitate these important tasks.

In this chapter:

Understanding the Change Management Process

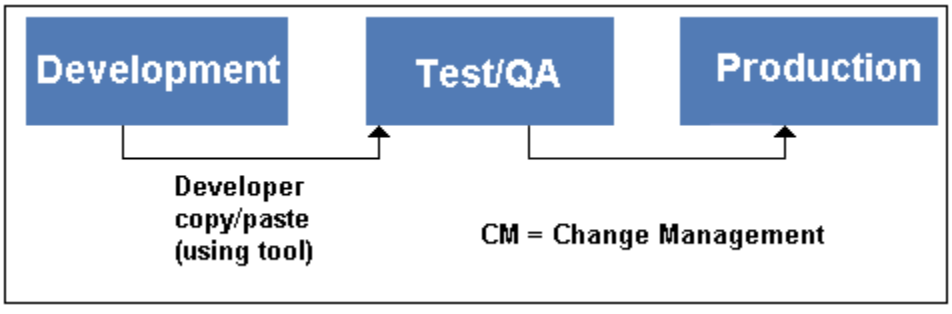
Developing an application is an iterative process. Developers revise application code and periodically move these components to the test environment for user feedback and acceptance. At some point within the application development lifecycle, when the application is stabilized, it is moved to production. After an application is released for general use, problems must be fixed, tested, and incorporated into the production environment. This is the essence of the change management process, which is also referred to as production control.

Organizations vary widely in how they approach change management. Some delegate much of the responsibility to developers, while others establish alternative processes to maintain a higher degree of control. Typically, developers utilize development tools to perform these duties, while change management professionals prefer batch-oriented methods to move application components between environments. Developers may be required to create a change management package in order to initiate changes after the application is moved to production. A combination of these approaches is often used in larger companies.

The examples that follow illustrate two different change management processes. These sections describe product features and methodologies that can be utilized by companies to meet their change management objectives.

Moving Application Files: A Simple Change Management Process

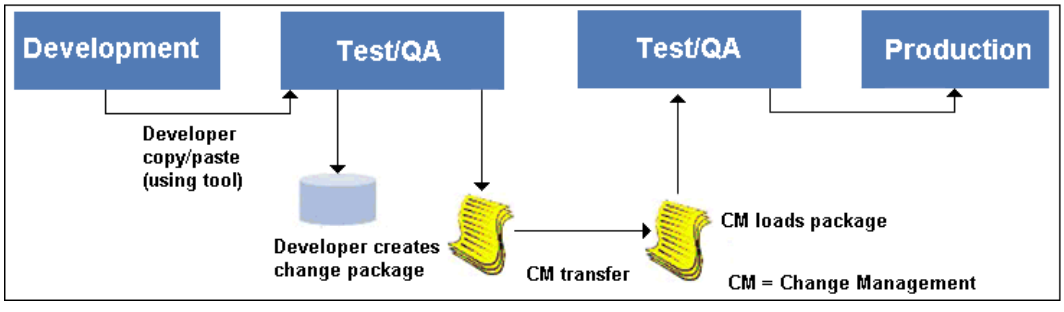
Developers move application files between the development and test environments using their development tool, as shown in the following image. When the application is finished, the application is copied from the test environment to the production environment, using operating system utilities. There may only be a single test environment.



Moving Application Files: A Comprehensive Change Management Process

In this example, four environments are established to increase the level of control of moving application code to production. Developers use the Resources tree to move application files from the development environment to the test environment. Developers then use the Change Management Export facility when they are ready to move their changes to the user acceptance test environment.

The Change Management Export facility allows the developer to select the resources to be moved and creates a change management package. An administrator can subsequently move the change management package into an acceptance test using the Change Management Import facility. Some organizations may choose to utilize an automated process to import the content, to achieve better integration with their business processes. As shown in the following image, when the application is deemed ready for release, the production control personnel initiate a file system copy of the application to the production environment. Users begin using the application and the change management process shifts into an application maintenance support role. From this point forward, incremental updates to production are facilitated by administrators using the Change Management Import facility.



Creating a Change Management Package

Many organizations do not grant developers write access to the user acceptance test and production environments. Access to these environments is strictly controlled and granted only to administrators, production control personnel, or automated change management processes.

Only developers know which changes are ready to be moved into the test environment. The Change Management Export facility presents developers with a graphical view of the resources they manage and allows them to build a change management package. This package is then loaded into another environment by production control personnel or automated processes.

Procedure: How to Create a Change Management Extract Package

A user must be a Web Query developer or administrator to create a Change Management Export Package.

The steps required for creating a Change Management Package are:

1. **Create a Scenario.** Using the Change Management Export user interface, create a Change Management scenario by selecting the resources to be exported. A scenario is a description of all the resources included in a Change Management Export Package.

2. **Export a Scenario.** After creating a scenario, export it to the change management export directory as a change management package. The export process produces the package in two formats: a folder and a Change Management zip file. The folder contains the expanded contents of the change management package. The Change Management zip file contains the compressed contents of that package in a format that is ready to download and transfer to target environments. This Change Management Export Package is placed in the directory with the same name as the scenario:

   `/qibm/userdata/qwebqry/base80/cm/export`

   The exported folder is then copied to the target environment and placed in the following directory:

   `/qibm/userdata/qwebqry/base80/cm/import`

   Note: The Change Management Export and Import activity is written to the following log file:

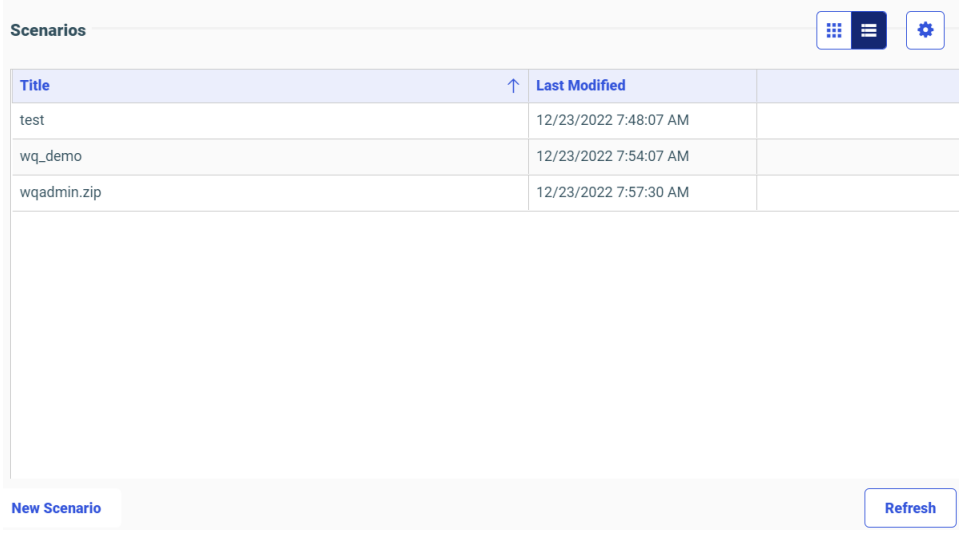
   `/qibm/userdata/qwebqry/base80/logs/impex.log`

3. **Download a Scenario.** For convenience, the change management zip file can be downloaded, using a web browser, from the export directory to a location outside of the change management directory. From this external location, the change management zip file is available for transfer to the import directory of the target Db2 Web Query environment, where its content can be imported and accessed.

Procedure: How to Access the Change Management Export Facility to Create a Scenario

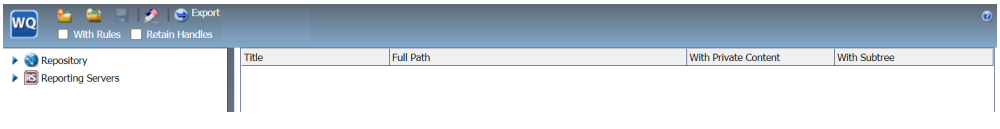
1. On the Hub side navigation pane, select *Management Center* and *Export Packages*.

Or, on the Web Query Home page, in the banner, open the *Utilities* menu, and select *Change Management and Export* to open the Scenarios dialog box, as shown in the following image.



2. Select *New Scenario* to open the New Scenario dialog box, as shown in the following image.

3. In the New Scenario dialog box, type a name for the scenario, and then select *Create* to open the Change Management Export Interface, as shown in the following image.



This will invoke the user interface to create the Scenario, which allows a user to select Resources that will be moved to the target system.

There are two major options listed on the top of the Change Management Export Interface.

With Rules. Unselected by default. This option should not be selected.

Retain Handles. This option is necessary when a release 2.1.x or 2.2.x source environment is migrated from a 1.1.x release of Db2 Web Query, and this content is used in a Change Management process. During migration from release 1.1.x to release 2.1.x or 2.2.x, the 1.1.x release hrefs are used as the 2.1.x or 2.2.x release handles to allow the earlier code for –INCLUDEs and drill downs to continue to work with the release 1.1.x style syntax. Moving these handles to the target environment, will allow code that contained the earlier style –INCLUDE and drill down syntax to continue to work.

The following types of resources can be moved:

- Any folder or item from the /WFC/Repository or what is shown in the user interface as Db2 Web Query, including procedures (FOCEXECs), Stylesheets, Images, HTML files, Schedules, and Distribution Lists.
- Any application or specific files from the Reporting Server node on the tree.

Selecting Resources

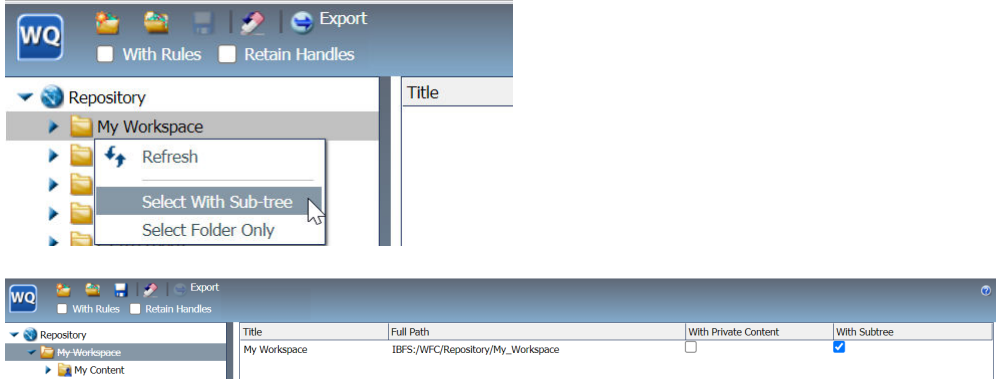
- Resources are selected by either dragging content from the Change Management tree on the left, to the right pane. Or, using the context menu and right-selecting the content you want to move, and choosing either *Select With Sub-tree* or *Select Folder Only*.
  - Select With Sub-tree selects that folder and all subfolders.
  - Select Folder Only selects the specific folder, with no content. Typically, that is done to move rules on the folder.

When your selection is complete, an entry for it appears in the right pane, and a strikethrough line appears on the entry under the Resources tree.

- If you select a private resource, the With Private Content check box is automatically selected and cannot be cleared.
- If you select private content, it will only be imported if the owner of that private content already exists in the target environment.
- If you select a published folder, you can include private content within it by selecting the *With Private Content* check box for that resource. This selection exports all of the private content in that folder and its subfolders, including those My Content folders that are assigned to individual users, even if you do not have the privileges necessary to view that private content.

- If you select a subfolder without a parent folder, the Import process will recreate the parent folder in the target environment. A connection to the same metadata must exist within the target environment as well as the source environment.
- When selecting a collaborative portal and pages that reference external content, be sure to include that content in the change management package.
- If the rules on the source and target environments are different, users may have access to private content in the source environment, but be denied access in the target environment. This occurs if users have access to the published folder that contains the private content in the source environment, but do not have it in the target environment.

Selecting a folder



4. Now that resources are selected, the Scenario should be saved.

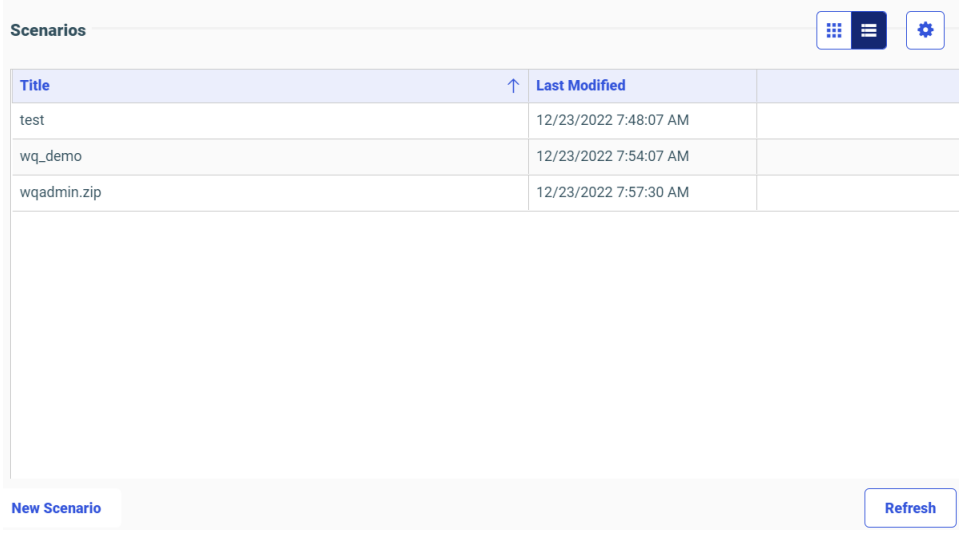
   Once saved, the Scenario can be run through the Change Management Import interface.

Procedure: How to Download a Change Management Package Zip File

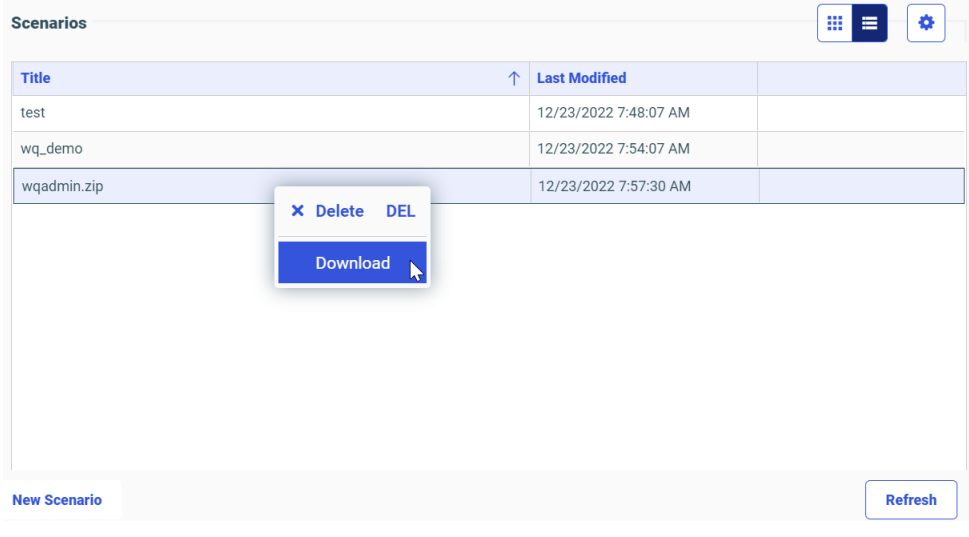
The export process saves a change management zip file to /qibm/userdata/qwebqry/base80/cm/export. The download process takes that change management zip file, and downloads it to your local machine. You can then transfer the copy of that change management zip file to another Web Query environment for use as a change management package.

1. On the Hub side navigation pane, select *Management Center* and *Export Packages*.

Or, on the Web Query Home Page, in the banner, open the *Utilities* menu, and select *Change Management and Export* to open the Scenarios dialog box, as shown in the following image.



2. Right-click the change management zip file you want to download, and then click *Download*, as shown in the following image.



Note: When choosing between two list entries that include the same name, you can distinguish the full change management package from the zip file version by remembering that the name assigned to the Zip file includes the name of the change management package from which it was taken, the date and time on which the package was created, and the ID of the user who created it. The name assigned to the full change management package does not contain any of these additional details.

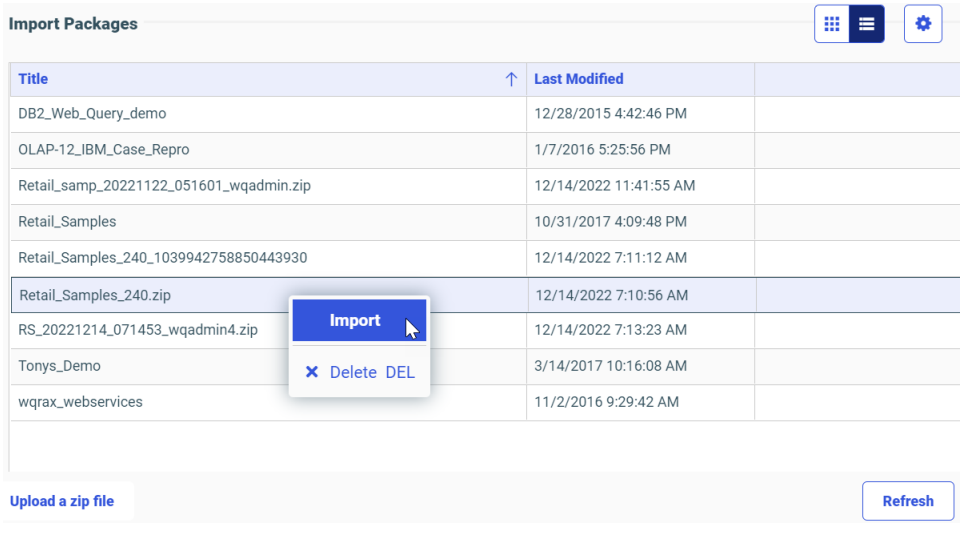
3. Save the change management zip file to an external location as directed by your browser.
4. Close the Scenarios dialog box.

Procedure: How to Upload a Change Management Package Zip File

The zip file upload process saves a copy of a change management zip file stored on your local machine to the change management import directory on the server, /qibm/userdata/qwebqry/base80/cm/export. You can then import the copy of that change management zip file to Web Query.

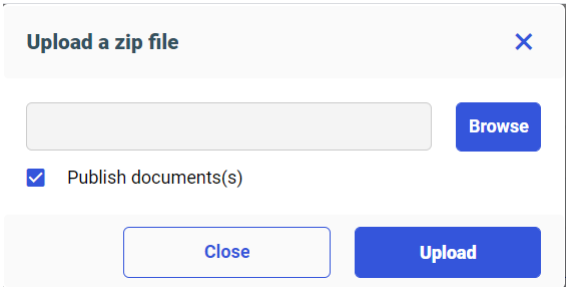
1. On the Hub navigation pane, select *Management Center* and *Import Packages*.

   Or, on the Web Query Home Page, in the banner, open the *Utilities* menu, and select *Change Management and Import* to open the Import Packages dialog box, as shown in the following image.



2. Select the change management zip file you want to upload, and then click *Upload a zip File*.

The Upload a zip File dialog box opens, as shown in the following image.



3. Click *Browse*, navigate to the location where you have saved the change management package, click the change management zip file you want to upload, and then click *Open*.
4. Ensure that the correct change management zip file appears in the File to Upload field, and decide whether or not to import files from the package as published or unpublished files.

   - To establish the contents taken from the change management zip file as published after the upload is complete, select the *Publish Documents* check box. This is the default setting.
   - To establish the contents taken from the change management zip file as private after the upload is complete, clear the *Publish Documents* check box.

5. Click *Upload*.

   A confirmation dialog box opens. Click *OK* to complete the upload.

6. In the Upload a Zip File dialog box, click *Close*.

   If an entry for the new change management zip file does not appear below the Import node, right-click it, and then click *Refresh*.

Procedure: How to Import a Change Management Package

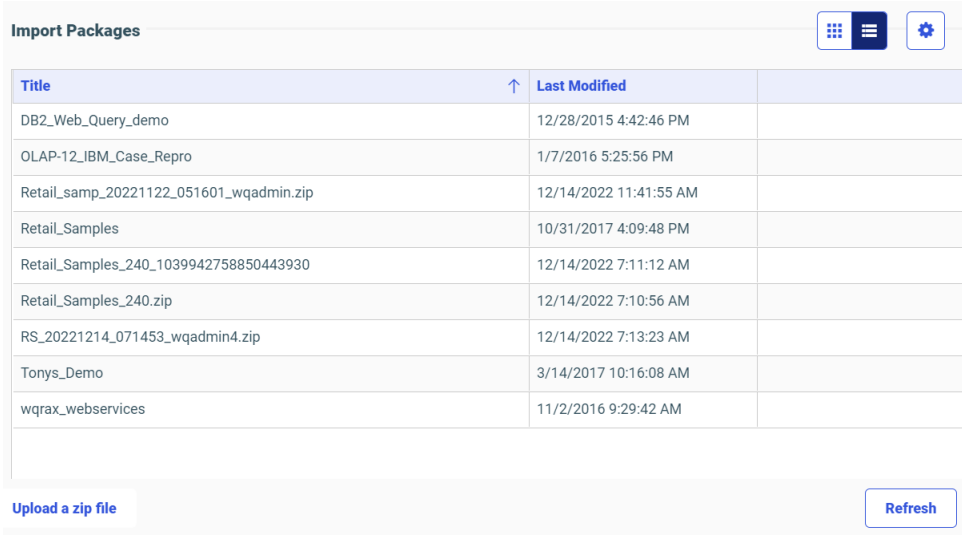
A user must be a Web Query administrator to Import a Change Management Package.

This step assumes that a Change Management Extract Package has been previously created and has been copied to the target environment in the following directory:

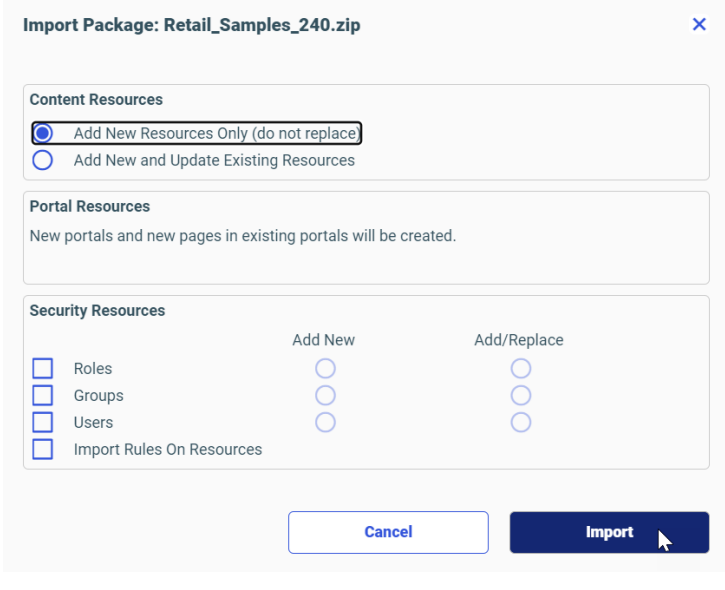
`/qibm/userdata/qwebqry/base80/cm/import`

1. On the Hub side navigation pane, select *Management Center* and *Import Packages*.

Or, on the Web Query Home Page, in the banner, open the *Utilities* menu, and select *Change Management and Import* to open the Import Packages dialog box, as shown in the following image.



2. Right-click the change management Zip file you want to import, and then click *Import* to open the Import Package dialog box, as shown in the following image.



3. In the Content Resources group, accept the default selection, *Add New Resource Only (do not replace)*, to limit the change management import to new content resources.

   or

   Select *Add New and Update Existing Resources*, to enable the change management import to include updates to existing content resources as well as new content resources.

4. In the Security Resources group:

   a. Select the *Roles* check box to include Roles in the Change Management Import package.

   b. Select the *Groups* check box to include groups in the Change Management Import package.

   c. Select the *Users* check box to include the individual users in the Change Management Import package.

      For each security resource, accept the default selection, *Add New*, to limit the Change Management Import to new security resources.

      or

      Click *Add/Replace*, to enable the Change Management Import to include updates to existing security resources as well as new security resources.

   d. Select the *Import Rules on Resources* check box to include any new rules assigned to the security resources included in the Change Management Import package.

5. When the configuration is complete, click *Import*.

   The import process loads content from the change management package into the folders that match the name and spelling of the corresponding folders in the old environment. If the resources in the change management package are assigned to the same folders and locations as in the existing environment, there are no visible changes.

   However, if you do not see your expected changes, right-click the *Workspaces* entry in the Resources tree and select *Refresh*.

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