IBM Db2 Web Query for i
Creating Portals

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Chapter 1

Building Portal Applications

The Db2 Web Query for i Portal is an analytical content management system that provides a flexible and interactive environment for both authors and consumers of data analytics. It allows users to access and share content, customize their portal experience, collaborate, and build sophisticated structures for data storytelling.

The key benefits of the portal are:

- Multi-level page navigation, which is useful in organizing large numbers of pages.
- Flexible page layout options for dashboards and InfoApps™.
- Mobile-friendly design that ensures responsive behavior on any device and with any type of content.
- Built-in page filter that is automatically enabled whenever users display parameterized content on a personal page.
- Modern styling featuring clean and streamlined UI and customizable themes.

In this chapter:

- Creating Portals
- Defining a Portal Structure
- Running Portals
- Targeting a Page to Open When Running a Portal
- Launching a Portal with Parameters
- Enabling and Sharing Personal Pages
- Customizing Portals
- Applying Themes to Portals
- Adding Icons to Portal Levels
- Customizing User Menu Options
- Using a JavaScript Function to Navigate to a Designer Portal Page
- Publishing Content

Creating Portals

You can create a portal structure in your repository, which you can populate by adding pages. You can also configure the option for users to create personal pages.

Procedure: How to Create a Portal

1. In the Workspaces area, in the Resources tree, select the workspace or folder where you want to create the portal, click the + *Content* button, point to *Application*, and then click *Portal*.

   The New Portal dialog box opens. There are three tabs in the New Portal dialog box:

   - Properties
   - Layout Options
   - User Menu Options

2. Populate the fields of the Properties tab.

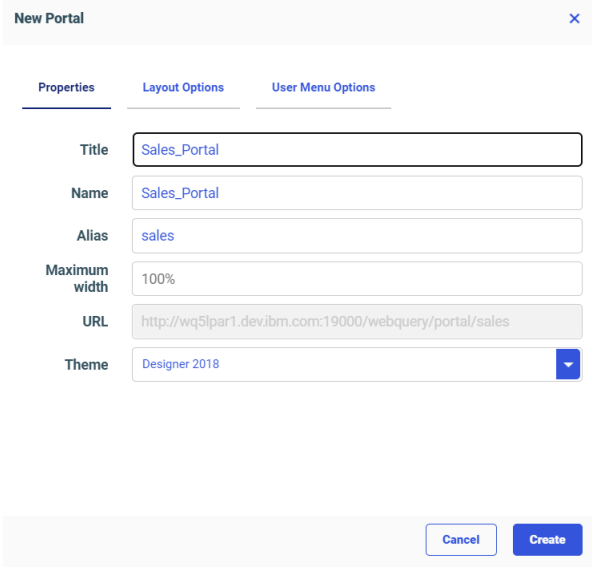
   The following fields are available:

   - **Title.** The title of the portal.
   - **Name.** The name of the portal. This field is populated automatically to match the Title field. You can edit the field with a custom name, if you want.
   - **Alias.** Creates an alias for your portal.
   - **Maximum width.** Controls the maximum width of the portal, which includes the banner, all pages, and side navigation. If specified, overrides the Maximum width property set for pages in the portal.

     Note: The placeholder text changes to a pixel value when you enter a number.
   - **URL.** A read-only field that displays the URL for the portal.

     Note: When you type an Alias value, the URL field automatically changes to reflect the new location.
   - **Theme.** Allows you to select themes that can be customized.

An example of the Properties tab that has been populated with information is shown in the following image.



3. Make your selections in the Layout Options tab.

   The following options are available:

   - **Navigation.** Provides layout selection for your portal. The options are Side Navigation, Top Navigation, and Top & Side Navigation.
   - **Banner.** Provides access to the following options:
     - **Enable banner in portal.** Activates the banner for your portal.

       Note: It is recommended to disable the banner if you plan to embed your portal into a third-party application.

       If this option is enabled, the following options become available:

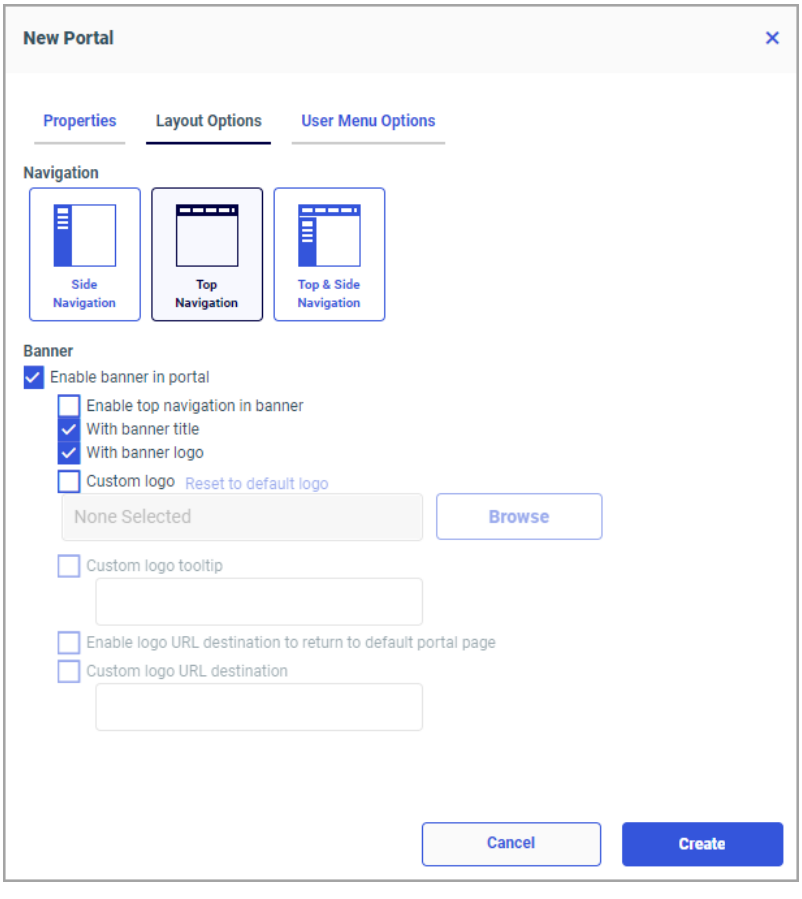
       - **Enable top navigation in banner.** If selected, displays the folder structure as banner links rather than tabs. This option is only available for Top Navigation and Top & Side Navigation layouts.
       - **With banner title.** When selected, displays the title of the portal in the banner.
       - **With banner logo.** When selected, displays the portal logo in the banner.
       - **Custom logo.** Allows you to customize a logo for your portal.

If this option is enabled, the following options become available:

- **Custom logo tooltip.** Allows you to specify the tooltip text for your custom logo.
- **Enable logo URL destination to return to default portal page.** If enabled, makes your custom logo a clickable object that reverts the portal view to the default portal page.
- **Custom logo URL destination.** If enabled, allows you to specify a custom URL that will display when your custom logo is clicked.

Note: You can go back to displaying the default TIBCO logo in your portal banner at any time, by clicking the *Reset to default logo* link.

An example of the Layout Options tab is shown in the following image.



4. Make your selections for the User Menu Options tab.

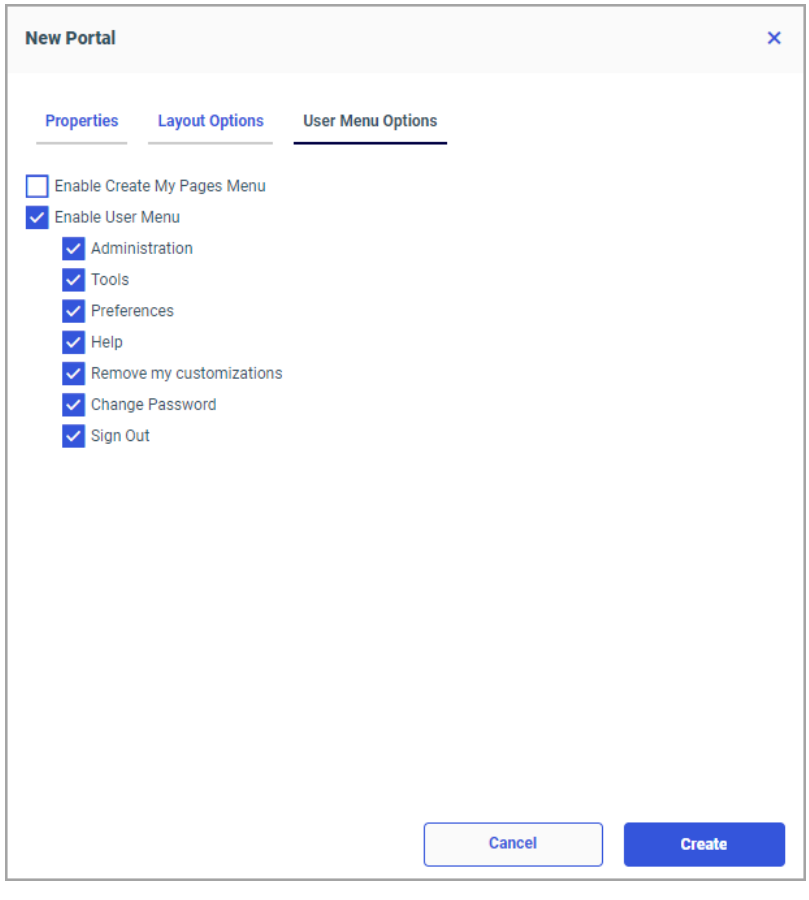
   The following options are available:

   - **Enable Create My Pages Menu.** If selected, allows users to create personal pages at run time.
   - **Enable User Menu.** If selected, displays a user menu inside your portal and allows you to select which options will display in this menu.

     The following user menu options are available: Administration, Tools, Preferences, Help, Remove my customizations, Change Password, and Sign Out.

     Note: These options are subject to user permissions.

   An example of the User Menu Options tab is shown in the following image.



5. Click *Create*.

   The new portal structure is created in the specified workspace or folder. It is now ready to be populated with folders and pages that serve as links to other pages.

6. To edit your portal, right-click it, and then click *Edit*.

   The Edit Portal dialog box opens, where you can change your selections.

Defining a Portal Structure

Each portal is a conglomerate of various parts that you can use to make your portal a comprehensive representation of your data narrative. For example, you can add pages to your portal to showcase data. You can create sections and sub-sections to better organize your content. The structure of a portal can be as simple or as complex as required by your specific purpose.

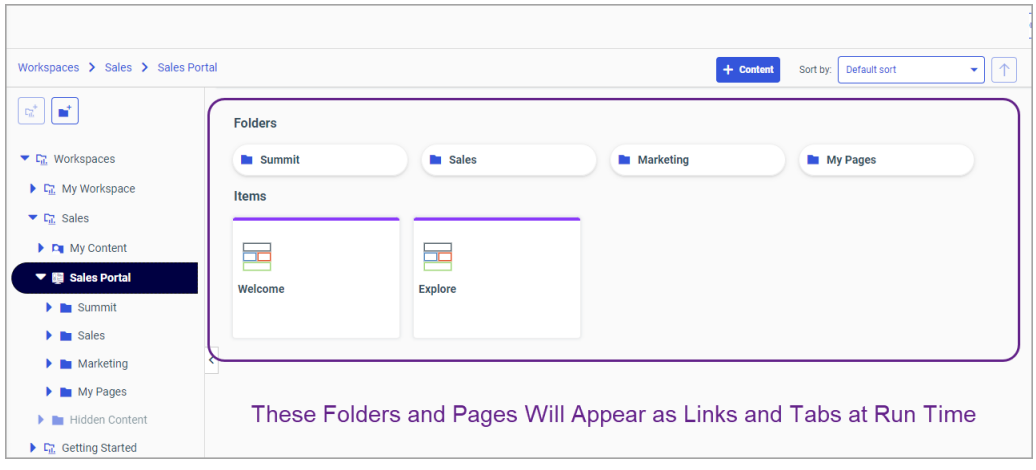
You can use these elements to define a portal structure by building a simple folder hierarchy.

Procedure: How to Define a Portal Structure Using Content

1. Create a portal as described in *Creating Portals* on page 6.
2. In the Workspaces area, in the Resources tree, select the portal you want to modify.
3. Using the + Content menu and the plus button, add content to create a portal navigation layout of your choice.

   You can create pages and folders to populate your portal.

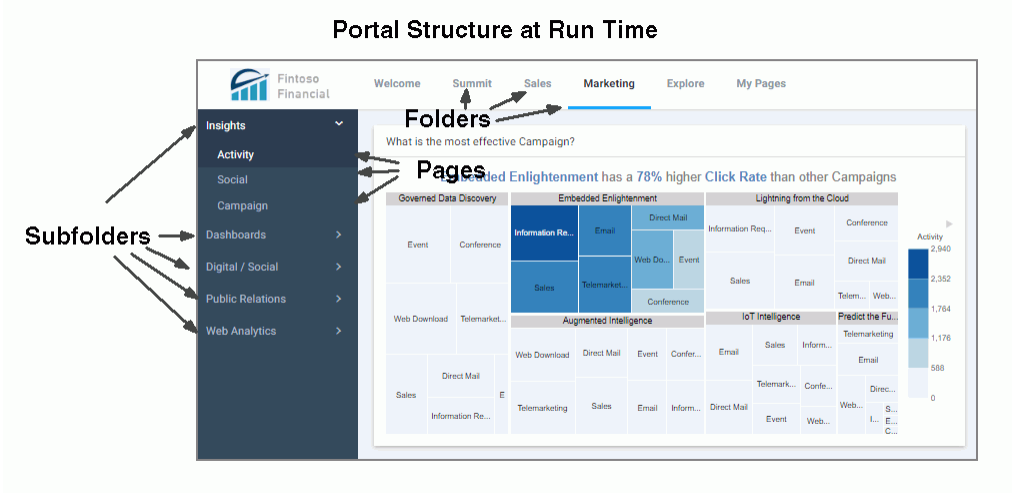
The images below show an example of the initial view of the portal that consists of pages and folders.



When tabs or links overflow beyond the width of a page, an ellipsis icon displays allowing you to access the entire list of tabs or links, as shown in the following image.

4. Optionally, add more folders, subfolders, and pages to your portal.

   The image below shows an example of how folders, subfolders, and pages make up the structure of a portal.



5. Once your portal is complete, you can publish it and make it available to other users.

Running Portals

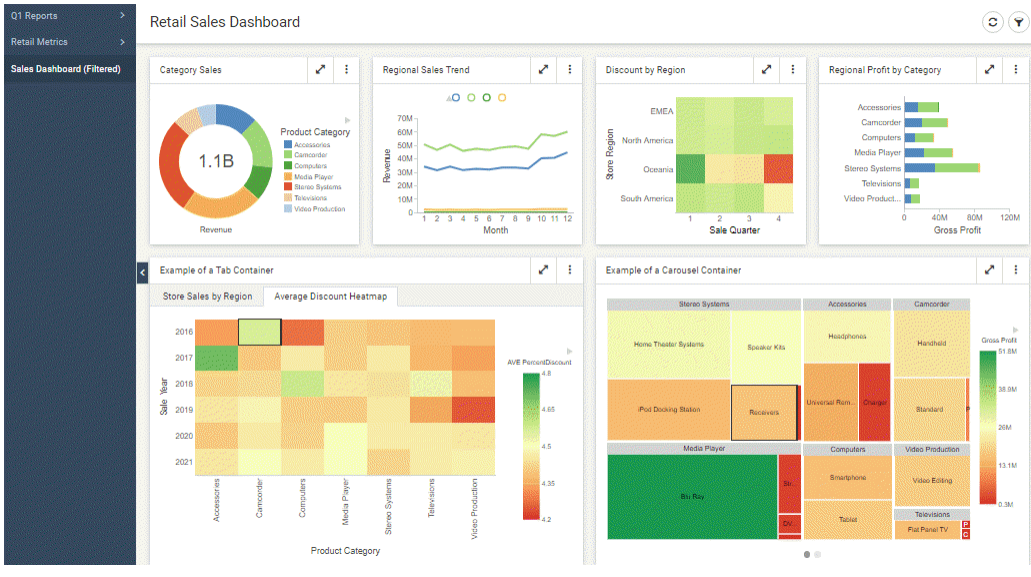
You can run a portal from the following locations on the Web Query Hub:

- ❑ Resources tree in the Workspaces area.

- Content section in the Workspaces area.
- Portals area of the Hub.

To run a portal, right-click it, and then click *Run*.

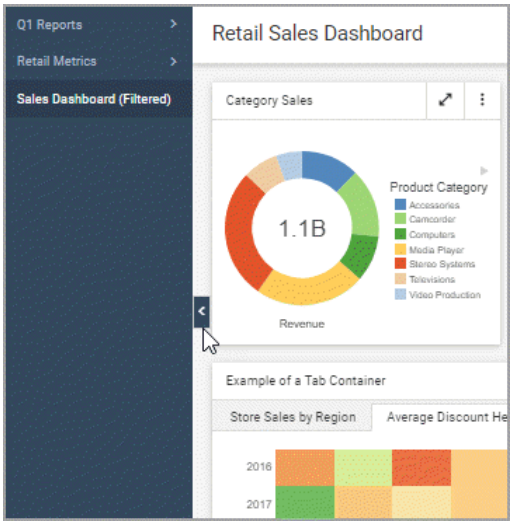
An example of a portal at run time is shown in the following image.



You can perform the following actions in the portal at run time:

- Navigate between pages and levels.
- Interact with content, including Insight-enabled items.
- Collapse the side navigation panel to maximize the space on a page.

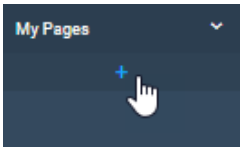
To collapse the side panel, click the *Collapse navigation* arrow, as shown in the following image.



This option is available in Two-level side and Three-level layouts.

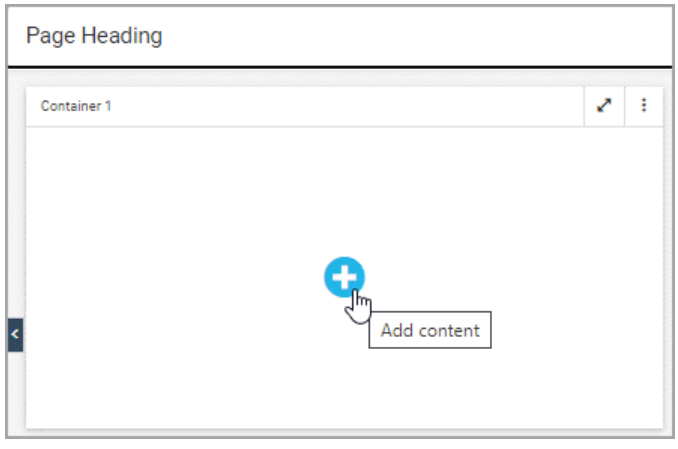
- Add personal pages.

  To add a personal page, navigate to the My Pages level, and click the + icon, as shown in the following image.



- Select a layout for your personal page.
- Populate your personal page with content available to you in your repository.

To add a content item to the personal page, click the *Add content* icon, as shown in the following image, and, in the Select Item dialog box, navigate to the item of your choice.



- Use the built-in filter window to refine your personalized content.
- Use the Bookmark feature to save a specific filtering configuration of your personal page.
- Share your personal pages with other users and groups in your organization.
- Use the User menu to access the utilities, help, and administrative settings that are available to you based on your role.

Targeting a Page to Open When Running a Portal

You can target a specific page or sub-page, while running a portal from an alias URL. This URL can then be saved and bookmarked similarly to any other page on the web. To learn more about creating an alias, see *Creating Portals* on page 6.

Procedure: How to Target a Page to Open in a Portal at Run Time

1. Create a portal as described in *Creating Portals* on page 6, making sure to give your portal a unique alias.

   Note: If your exact alias already exists in the repository, you will not be able to save your portal. Modify the name of your alias to save your portal and close the New Portal dialog box.

2. Populate your new portal with levels, as described in *Defining a Portal Structure* on page 10.
3. Generate a URL to the level of your choice by applying the following sequence:

   `https://hostname:12331/webquery/portal/portal_alias/page_2`

where:

hostname:*port*

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

portal_alias

Is the name of your alias.

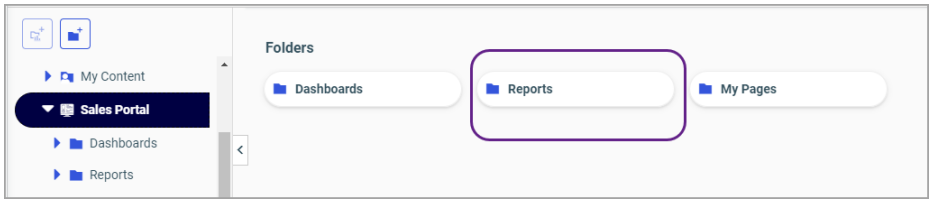
page_2

Is the name of the level that you want to open when your portal runs.

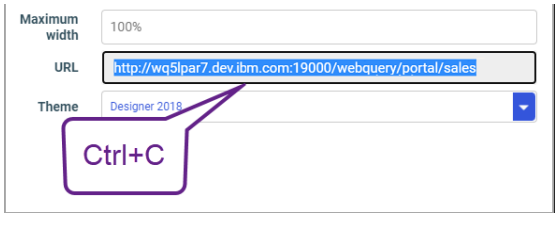
In our example, to open the second tab when the portal runs, follow these steps to achieve this result:

1. Locate the level within the portal structure that corresponds to the tab that you want to open at run time.

   In our example, locate the Reports folder, as shown in the following image.



2. To easily locate the alias link, right-click your portal, click *Edit*, and copy the URL field value, as shown in the following image.

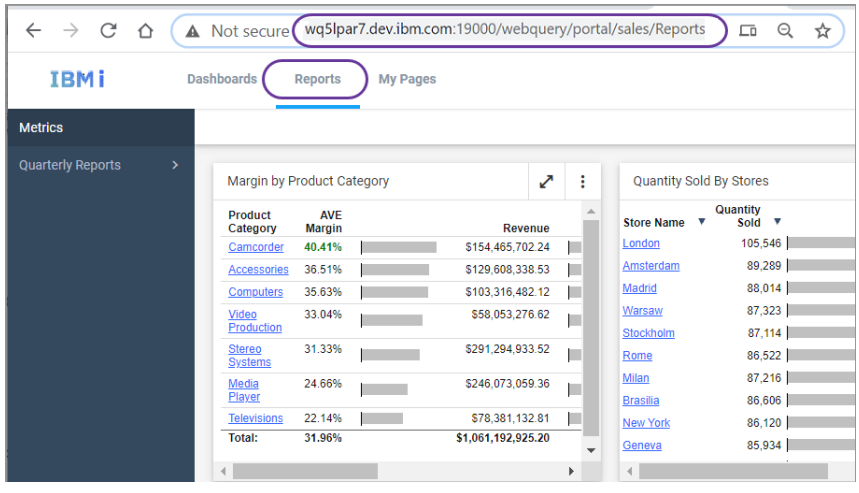


3. In a new browser window, paste your alias URL in the address bar, add / and the name of your level at the end of your URL, in our case */Reports*.

   Your URL is ready to be run.

4. Press *Enter* to run your URL.

The portal runs and opens the level that we selected, as shown in the following image.



5. Optionally, bookmark this URL for future use.

Procedure: How to Target a Sub-page to Open in a Portal at Run Time

By default, when a portal runs, the first page of the first tab displays. You can change this behavior by creating a direct link to a specific sub-level.

1. Create a portal and populate it with levels, as described in the previous procedure.
2. Generate a URL to the sub-level of your choice by applying the following sequence:

   `https://`*`hostname`*`:12331/webquery/portal/`*`portal_alias/menu_1/page_2`*

   where:

   `hostname``:`*`port`*

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

   `portal_alias`

   Is the name of your alias.

   `menu_1`

   Is the name of the level which contains the page that you want to display.

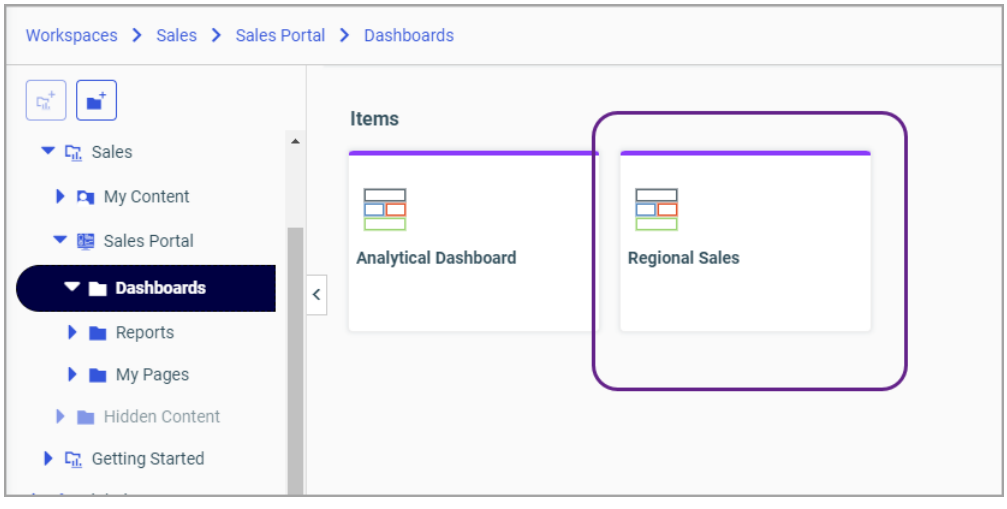
   `page_2`

   Is the name of the page that you want to display.

In our example, to open the second page under the first tab when the portal runs, follow these steps to achieve this result:

1. Locate the page within the portal structure that corresponds to the sub-level that you want to open at run time.

   In our example, locate the Regional Sales page inside the Dashboards folder, as shown in the following image.



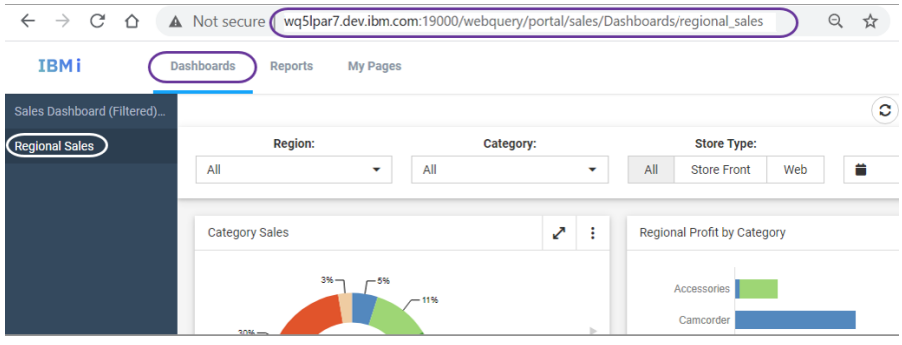
2. Locate and copy the alias URL, as described in the previous procedure.
3. In a new browser window, paste your alias URL in the address bar, and add the names of your level and sub-level, separated with the / symbols.

   In our case, we are adding */Dashboards/regional_sales*.

   Note: The URL is case-sensitive. If you are unsure of the correct name of your level or sub-level, right-click this element in the Workspaces area, click *Properties*, and, in the Properties panel, check the Name field value.

3. Press *Enter* to run your URL.

The portal runs and the second page of the first tab displays, as shown in the following image.



4. Optionally, bookmark this URL for future use.

Launching a Portal with Parameters

You can launch a Designer portal with an added benefit of passing parameters to its content across all pages. This feature is useful when you need to narrow large sets of data or in cases when a focus on a specific element is needed. Furthermore, you can save your modified parameterized portal as a URL in your repository for easy reference, or you can display this URL in other pages or portals. You can also build in access to your parameterized portal into drill-down links within a chart or report.

Procedure: How to Launch a Portal with Parameters

1. In the Workspaces area of the Hub, create a portal, as described in *Creating Portals* on page 6.

   Note: It is recommended to create an alias for your portal. This will ensure a shorter URL, which is easier to reference and modify.

2. Inside your newly created portal, assemble parameterized content into pages, and add filters to your pages.

   Note: If you want to pass the same parameter across two or more pages of the portal, be sure to include parameterized content and filters for this parameter in every page.

3. Run your portal.

4. In the browser address bar, add the following syntax to your existing portal or alias URL and press *Enter*.

   ?&PARAMETER_NAME=PARAMETER_VALUE

where:

PARAMETER_NAME

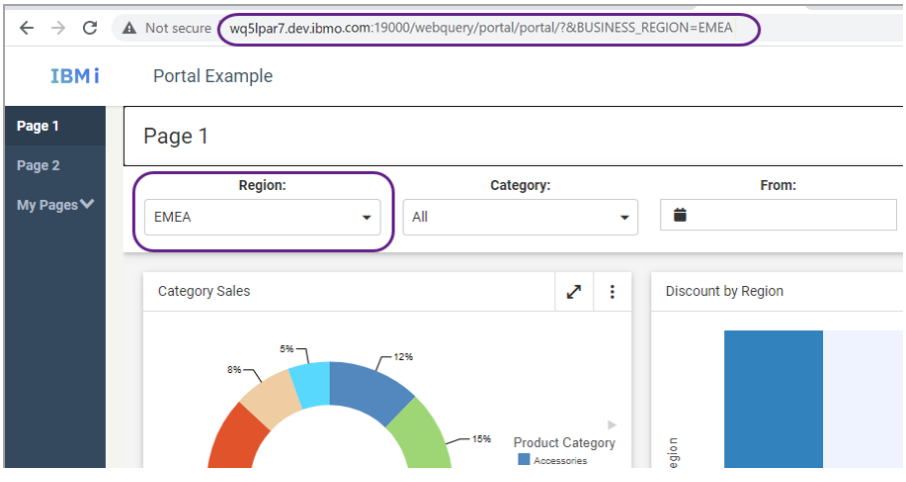
Is the name of the parameter you want to pass.

Note: To confirm the exact name of your parameter, open the page in Web Query Designer, click the *Info* button and note the parameter listed in the Parameters/Fields category.

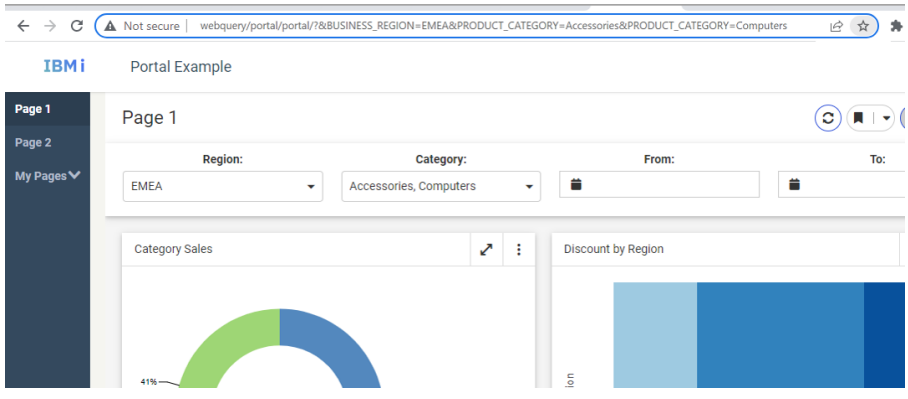
PARAMETER_VALUE

Is the value of the parameter you are passing.

In our example, the EMEA value for the Region filter is specified, as displayed in the following image.



If you want to pass multiple parameters, simply repeat the syntax for each new parameter at the end of the URL. In our example, the EMEA value of the Region filter, and the Accessories and Computers values for the Category filter are specified, as shown in the following image.



Note: When you are specifying multiple values of the same parameter, make sure this filter supports multiple selection of values.

5. Once you have modified your portal URL, you can save it in your browser and share it with other users in your organization.

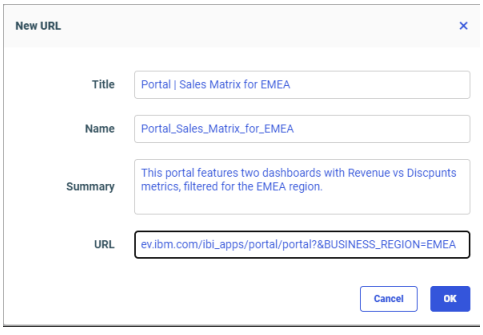
Procedure: How to Save a Parameterized Portal as a URL

You can save your parameterized portal as a standalone URL content item in your repository.

1. Create a portal and modify its URL to pass the desired parameters, as described in the previous procedure.
2. Copy the modified URL.
3. In the Workspaces area of the Hub, from the + Content menu, point to *Other*, and then click *URL*.

   The New URL dialog box opens.
4. Paste the modified portal URL into the URL field and populate the Title field.
5. Optionally, populate the Summary field, adding a description of your portal.

An example of a fully populated New URL dialog box is shown in the following image.



6. Click *OK*.

   The URL item displays in your repository. You can now run it, share it, and include it in other portals or pages as a content item.

Procedure: How to Configure Drill-Down Links to Launch a Portal With Parameters

You can create a report or chart with hyperlinks that launch a portal with parameters.

1. On the Web Query Hub, click the plus menu and then click *Create Visualizations*.

   Web Query Designer opens.

2. Select the same data source that you used to create content in the pages of your portal.

   After you select a data source, the Web Query Designer canvas loads.

3. Optionally, change the content type by selecting an option from the Content picker.

   In this example, we will create a report, since drill-down links in reports appear as easily identifiable hyperlinked text values. Therefore, we will select either the grid or standard report content type. However, you can add drilldowns to any standard chart type, as well. Drilldowns added to charts are available from tooltips when you point to an area of the chart.

4. Drag fields from the Field list into the appropriate buckets in the report. Add dimension fields to the Rows and Column Groups buckets, and measure fields to the Summaries bucket.

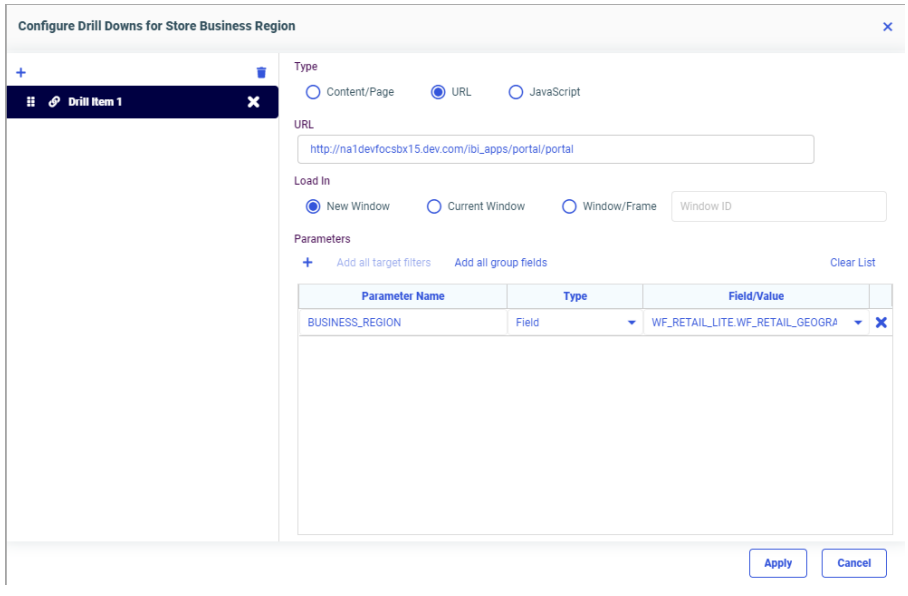
   Make sure to add the field by which the content in the portal is filtered when you pass the parameter.

5. Right-click the aforementioned common field in the Rows bucket and click *Configure drill downs*.

   The Configure Drill Downs dialog box opens.

6. Click the plus sign (+) button to create a new drilldown.
7. Select the *URL* radio button to create a URL drilldown.
8. In the URL field, paste the original unmodified URL of your portal or alias.
9. Specify the Load In option for your portal. The available options are: New Window, Current Window, and Window/Frame.
10. Click the plus button in the Parameters section to add a parameter.
11. In the Parameter Name column, type the name of the parameter you want to pass, leave the Type column as Field, and, in the Field/Value column, select the parameter that corresponds to the name you typed.

    An example of the populated Configure Drill Downs dialog box is shown in the following image.



12. Click *Apply*.

    The hyperlinks are added to the entries of the selected field.

13. Try clicking the hyperlinks to test the behavior.

    The portal loads and the parameter corresponding to the clicked hyperlink is passed.

14. Save your report and exit Web Query Designer.

Enabling and Sharing Personal Pages

Personal pages are created at run time by the user and allow the new level of versatility in a way users organize and use portals. Personal pages remain visible only to the user that created them, unless the user shares them. Personal pages reside inside the My Pages folder in the repository.

Procedure: How to Enable Personal Pages

1. In the Workspaces area, in the Resources tree, select the workspace or folder where you want to create the portal, click the + *Content* button, point to *Application*, and then click *Portal*.

   The New Portal dialog box opens.

2. On the User Menu Options tab, select *Enable Create My Pages*.
3. Make the remaining selections for the new portal, and then click *Create*.

   The new portal is created in the specified workspace or folder.

4. Publish the portal.

   Note: This step is crucial for activating the My Pages menu.

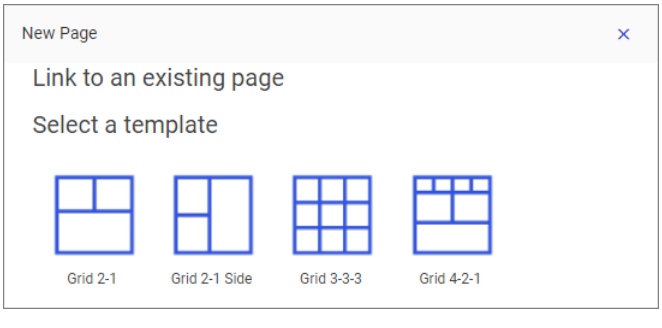
   The personal pages are now enabled and can be added by users at run time.

Procedure: How to Use Personal Pages

1. Run the portal in which personal pages are enabled.
2. Click *My Pages*, and then click the + icon to add a new page.

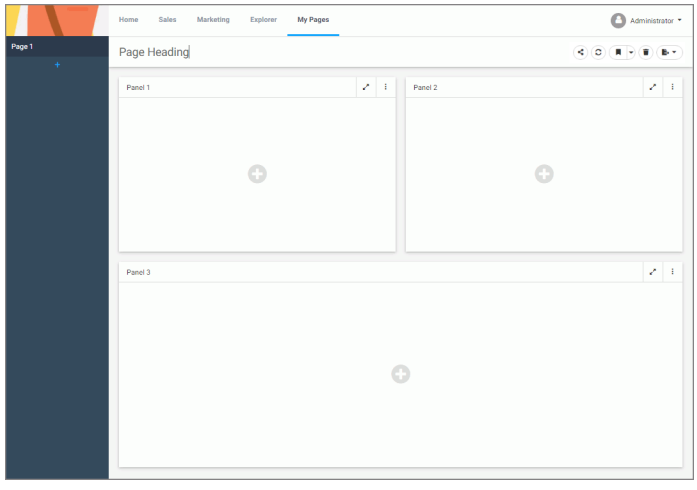
   Note: Depending on your navigation layout, the My Pages area can display as a tab or as a banner link.

   The New Page dialog box opens, as shown in the following image, where you can select a template and link to an existing standalone page in the repository.



3. Click a template of your choice.

   The page displays a series of interactive panels, as shown in the following image.



4. Add content to the panels.

5. If parameterized content is added to a page, optionally, click the *Show filters* button to display available filters.

   The Selections dialog box opens where you can apply filters to your content.

   Note: You can save your content and filter selections by using the bookmark button.

6. Double-click the Page Heading and type a new title for your personal page.

7. Optionally, double-click the page title in the sidebar and type a new title.

8. To share the page with other users, click the *Share* button .

   The Share with Others dialog box opens.

9. Type the names of users and groups with which you want to share your personal page and click *OK*.

   The page is now available to the specified users and the Share button changes color to blue.

10. To revoke access to the page, click the *Share* button again.

    The Share with Others dialog box opens where you can remove users or groups from the sharing list.

Note: If your sharing privilege does not allow you to open the Share with Others dialog box, you can share or unshare your personal page simply by clicking the Share button. In this case, the page is shared with every user that has access to the workspace in which the portal resides.

11. To delete the page, click the *Delete* button .

Customizing Portals

All users can remove their own customizations from a portal. Authors, developers, and administrators can also remove customizations for all users. Customizations are made when users customize unlocked content inside base portal pages. Personal pages and edits to personal pages are not considered customizations and, therefore, they are not removed.

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

1. In the Workspaces area, in the Resources tree, right-click a portal.
2. Point to *Customizations* and click one of the following options:
   - **Remove my customizations.** Removes your own customizations from a portal.
   - **Remove customizations for all users.** Removes all user customizations that were made to the interactive base pages in the portal.

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

1. From the Menu Bar of a portal, click your username.
2. Click *Remove my customizations*.

   The customizations are removed from the interactive base pages in the portal.

Applying Themes to Portals

You can apply themes to a Web Query portal to customize its look and feel. Themes can be applied to new portals inside the New Portal dialog box or to existing portals inside the Edit Portal dialog box. A theme affects the look of the entire set of elements of the portal, including colors, opacity, and typeface styles.

There are four themes that Web Query offers:

- Designer 2018
- Light

- Midnight
- Vivid

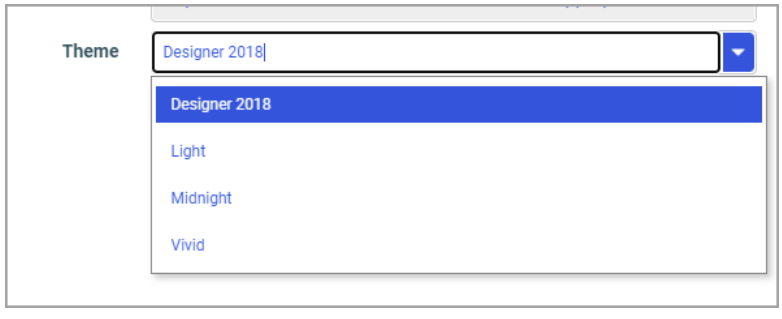
Additionally, you can create your unique custom theme and apply it to a portal.

Procedure: How to Apply a Theme to a Portal

1. In the Workspaces area, right-click a portal that you want to modify, and then click *Edit*.

   The Edit Portal dialog box opens.

2. Select a theme of your choice from the Themes drop-down list, as shown in the following image.



   Note: The same setting can be configured for a new portal inside the New Portal dialog box.

3. Click *Save*.

   The selected theme is applied to the portal.

Procedure: How to Create a Custom Portal Theme

1. Sign in to Web Query as an administrator.
2. In the Workspaces area, from the Resources tree, expand the *Global Resources* folder, and then expand the *Themes* folder.
3. Click the *Custom* folder, and then click *New folder* icon above the Resources tree.

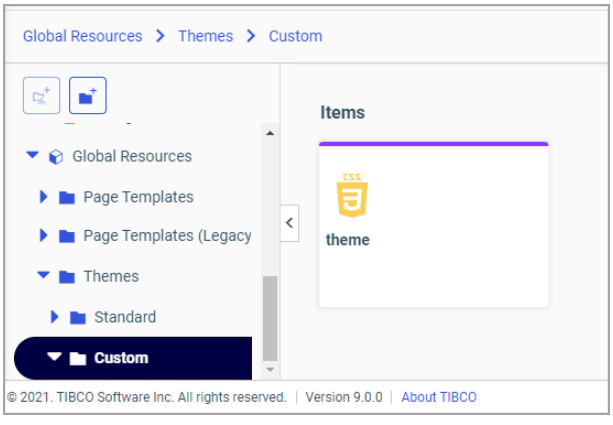
   The New Folder dialog box opens.

4. Populate the Title field with the name of your custom theme, and click *OK*.

   The custom theme folder is created. Your theme CSS file will reside in this folder. If you know which CSS classes should be used for your theme, you can create a new text file, add your code, and save this file as a *Cascading Style Sheet*. Alternatively, you can modify an existing theme CSS file. In this example, copy and modify the theme CSS file for the Light theme.

5. Expand the *Standard* folder, and then expand the *Light* folder.
6. Copy the theme CSS file, and paste it inside your new custom theme folder.

   The following image shows the correct hierarchy of the custom theme file.



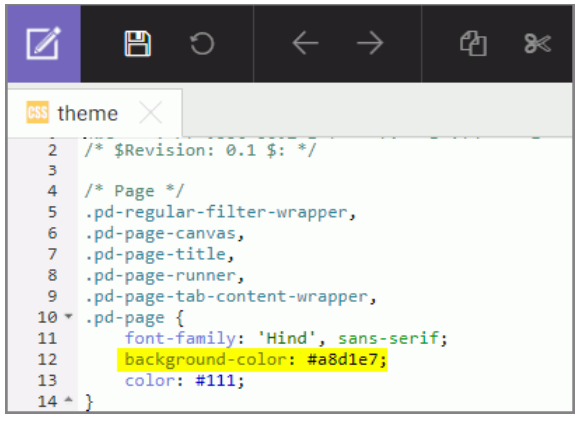
   Note: Do not modify the name of the theme CSS file. It is required that it stays the same for all themes. The name of the folder in which the file resides is the theme name that is available in Web Query Designer.

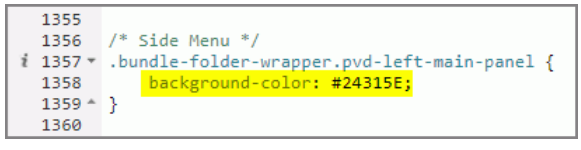
7. Right-click the theme CSS file that you copied, and then click *Edit*.

   The Text Editor opens in the new browser tab.

8. Modify the code to achieve the desired look of the theme.

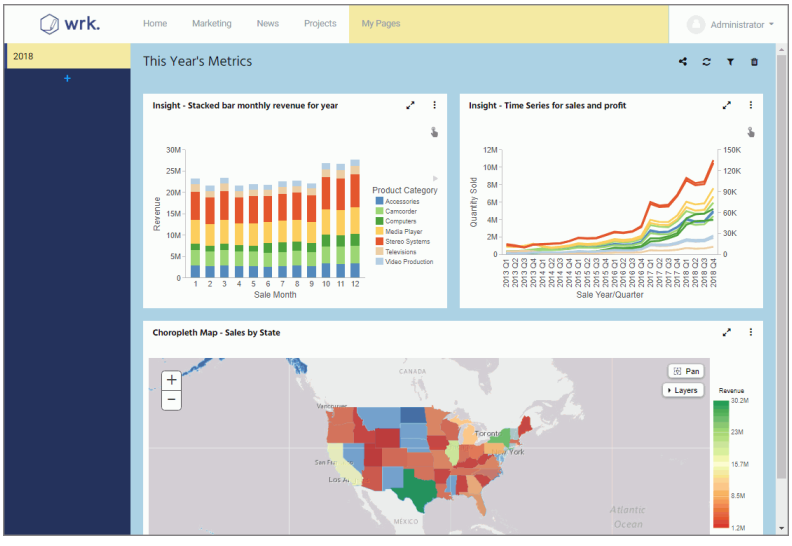
In this example, the sidebar, banner, and background colors were changed, as shown in the following images.





9. Save and close the Text Editor.
10. In the Workspaces area, apply the new custom theme to a page, as described in *How to Apply a Theme to a Portal* on page 27.
11. Run your portal to view the new theme.

An example of a new theme applied to a portal is shown in the following image.



Note: You can control access to themes, both standard and custom, by configuring the List And Read security rule for the theme folder.

Adding Icons to Portal Levels

You can further customize your portal by adding icons to pages and folders.

Procedure: How to Add Icons to Folders and Pages Inside a Portal

1. Create a Web Query portal, as described in *Creating Portals* on page 6.
2. Select the level to which you want to add icons, and locate its parent level.

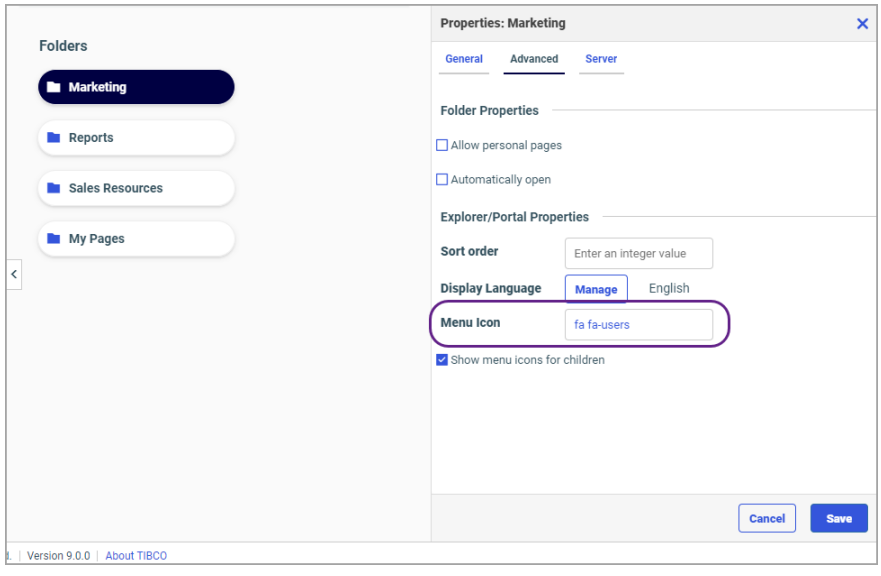
   In our example, we are enabling icons for the top level of navigation, so we will be configuring the portal folder itself.
3. Right-click the portal folder and then click *Properties*.

   The Properties panel opens.
4. Navigate to the *Advanced* tab, select the *Show menu icons for children* check box, and click *Save*.

   Now, any icons added to the top level pages and folders are visible.
5. Without closing the Properties panel, click the page or folder to which you want to add an icon.

6. In the Menu Icon field, type the CSS class of an icon you want to add.

   The following image shows an example of adding an icon to the Marketing folder.



   You can reference available icons and their CSS classes in the following websites:

   - https://fontawesome.com/v4.7.0/icons/
   - https://material.io/tools/icons/?style=baseline

   Click an icon that you want to use in your portal and copy its CSS class. If you are using icons from the fontawesome.com website, your CSS class should look similar to the following:

   ```
   fa fa-circle
   ```

   Note: If you have a license for the Font Awesome Pro icon packs, you can use CSS classes for your Pro icons instead.

   If you are using icons from the metrial.io website, your CSS class should look similar to the following:

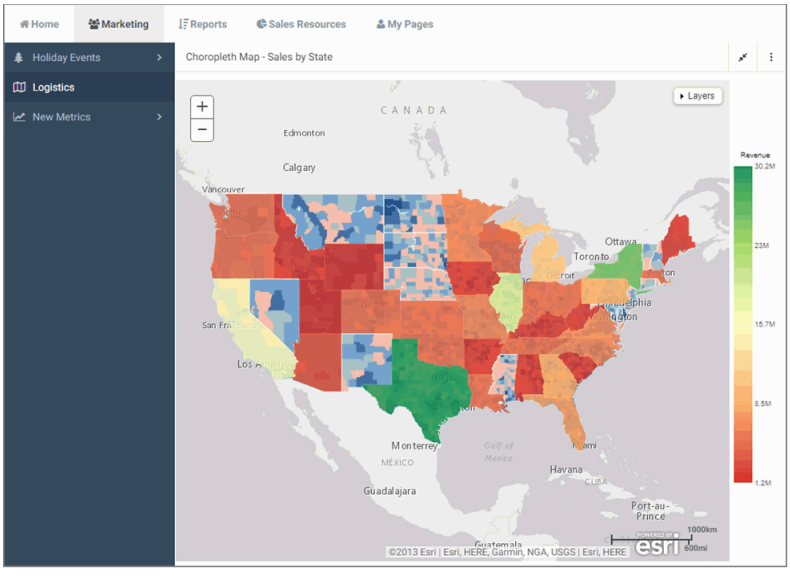
   ```
   material_icons pie-chart
   ```

7. Repeat the process for other folders and pages of your choice, making sure that the parent folder has the *Show menu icons for children* property selected.

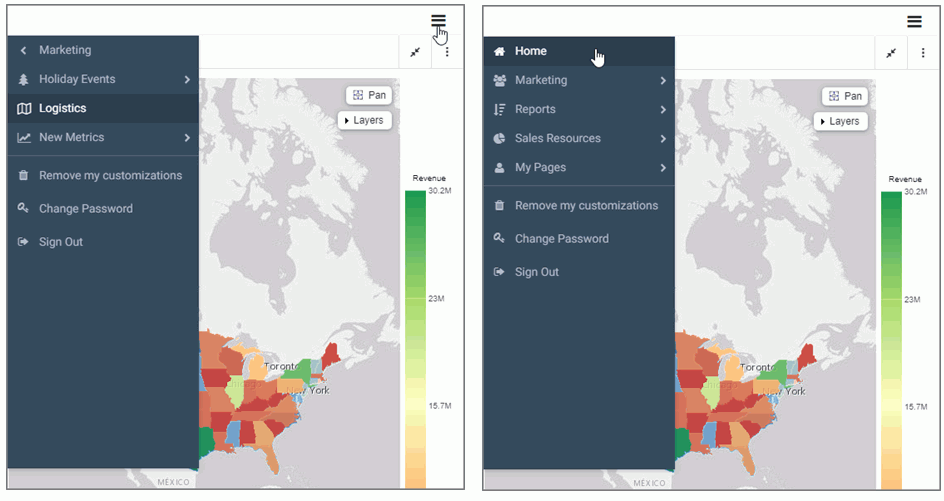
Note: Depending on the type of your navigation layout, certain levels do not display icons. The second level of the two-level side navigation layout does not display icons. The third level of the three-level navigation layout does not display icons. All layouts display icons for the top level of navigation. Responsive menus on mobile devices display icons for all levels of navigation.

8. To see the icons applied, run your portal.

   The following image shows the three-level navigation layout with icons added to the top and second levels.



When you resize the window, the same icons display in the side menu, as shown in the following images.



Customizing User Menu Options

As you build a new Designer portal or edit an existing one, you can customize the number and nature of options that display in the User menu inside the portal at run time. This capability adds a layer of control over the features and tools that are exposed to the users of the portal.

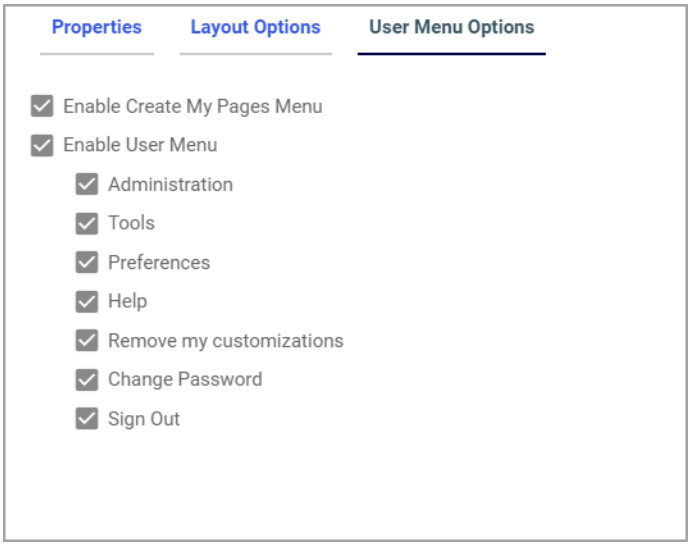
Procedure: How to Customize User Menu Options in a Designer Portal

1. On the Web Query Hub, in the Workspaces or Portals area, right-click the portal that you want to modify, and then click *Edit*.

   The Edit Portal dialog box opens.

2. Navigate to the User Menu Options tab.

Notice that the Enable User Menu option and the subsidiary options are enabled by default, as shown in the following image.



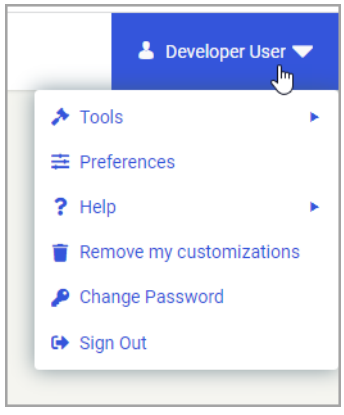
In this scenario, disable the Administration menu to prevent the user of this portal from accessing administrative tools.

3. Clear the *Administration* check box and click *Save*.

   Note: You can also perform this step at the point of creating a portal, as described in *Creating Portals* on page 6.

4. Right-click the portal, and then click *Run*.

The portal runs, and the modified User menu displays, as shown in the following image.



Using a JavaScript Function to Navigate to a Designer Portal Page

You can use a JavaScript function to dynamically navigate to other pages within your Designer portal, and immediately filter them based on the value that you select. This feature is especially useful in portals that contain multiple portal pages, because it allows you to link to a specific page within it. You can also pass a parameter from a link in the source item to filter the content in the target page, such as charts or reports, to quickly navigate through and show related information in different areas of your portal.

To use the navigateToPage function to jump from one page in a portal to another, perform the following tasks:

1. **Create Parameterized Content.** Create charts and reports to which the links in your source report will point.
2. **Set Up a Portal for the Navigate to Page Function.** Create the landing page for the links and save it in a portal.
3. **Create Hyperlinks in a Source Report.** Create hyperlinks within a report, which you will configure to point to a page containing the parameterized content.
4. **Add the Source Report to a Page in the Portal.** Add the source report to a page and add it to the same portal to which the target content was added.
5. **Finalize the Configuration of the JavaScript Function.** Ensure that the navigateToPage JavaScript function can be executed by the source report.

Stage One: Creating Parameterized Content

In this stage, you build parameterized reports and charts that will serve as the targets for drill-down links in the source report that you will create later.

It is prudent to build this content before creating the source report for a couple of reasons. First of all, these content items generally show detailed information that expands upon the information in the report. You can decide upon the information that you want to show in these target items, and how they should be filtered. Additionally, when you create the drill-down links in the source report, you will need to provide the parameter that you want to pass to these target items, and include the associated field in the source report. You will also need to include the IBFS path to the page that contains these target items. Therefore, it will be easier to create the target items and add them to a page in the portal first, then add the source report that targets them to a new page in the same portal.

Procedure: How to Create Parameterized Content for Hyperlinks

1. From the Web Query Hub, click the plus button, then click *Create Visualizations*.

   Web Query Designer opens.

2. Select a data source. This data source should be used for both the target content that you are creating now, and the source report that you will create later.
3. Optionally, change the content type using the Content picker. The default content type is a vertical stacked bar chart.
4. Drag fields from the Data pane onto the canvas or into the appropriate buckets on the Settings tab to create a chart or report.
5. Drag a dimension field from the field list to the Filter toolbar to create a prompted filter.

   You will also add this field to the source report later, and create a drilldown to pass a selected value from the source report to the parameterized content that you are creating now. You do not need to select default filter values.

6. Optionally, repeat step 5 to create more filters for this item. You can add all of these fields to the drill-down source item to pass values for multiple fields at once.
7. Save your content and close Web Query Designer.
8. Optionally, repeat steps 1-6 to create more content to add to the target page. Filter these items with the same field or fields if you would like to filter them all based on the value selected in the source report.

   Optionally, you can also click *Convert to Page* and then add new containers to create additional charts and reports in the same page on demand. If you choose to create new content directly within a page using this authored page workflow, skip steps 3 through 6 in Stage Two.

Stage Two: Setting Up a Portal for the Hyperlinks

In this stage, you will create a portal to which you will add a page containing the target content that you created previously.

Procedure: How to Set Up a Portal for the Hyperlinks

1. Create a portal.

   On the Web Query Hub, in the Workspaces area, select the folder in which you want to create your portal, then, in the + Content menu, point to *Application*, and then click *Portal*.

2. Give the portal a title, and optionally specify an alias, layout, and other configuration options.

   Click *Create* to create the portal.

3. Create a new page. Click the plus menu and then click *Assemble Visualizations*.

   Web Query Designer opens.

4. Select a page template, or use the Blank template to arrange the content on the page yourself.

   Once you select a page template, the page canvas opens.

5. Add the target content that you created in Stage One to the page.

6. Since you added prompted filters to the target content, a badge appears on the Filters tab on the sidebar.

   Select the *Filters* tab on the sidebar and then click *Add all filters to page*.

   Controls for all parameters are added to the Filter toolbar.

7. Save the page to the portal folder that you created in step 2, and then return to the Hub.

Stage Three: Creating Hyperlinks in a Source Report

In this stage, you will create a simple report with hyperlinks that point to the target page in the portal.

Procedure: How to Create a JavaScript Drilldown in a Report

1. On the Web Query Hub, click the plus menu and then click *Create Visualizations*.

   Web Query Designer opens.

2. Select the same data source that you used to create the target content in Stage One.

   This report will contain drilldowns that pass parameter values to those target items, opening and filtering the page containing them when a link is clicked.

After you select a data source, the Web Query Designer canvas loads.

3. Optionally, change the content type by selecting an option from the Content picker.

   In this example, we will create a report, since drill-down links in reports appear as easily identifiable hyperlinked text values. Therefore, we will select either the grid or standard report content type. However, you can add drilldowns to any standard chart type, as well. Drilldowns added to charts are available from tooltips when you point to an area of the chart.

4. Drag fields from the Field list into the appropriate buckets in the report. Add dimension fields to the Rows and Column Groups buckets, and measure fields to the Summaries bucket.

   Make sure to add the field by which the target items are filtered to the Rows bucket.

5. The next step is to create drill-down links on the field that was used to filter the target items. Complete the following steps to add a JavaScript drilldown that navigates to the page that you created in Stage Two.

   a. Right-click that field in the Rows bucket and click *Configure drill downs*. The Configure Drill Downs dialog box opens.

      If you added filters for multiple different fields to your target items, add the drilldowns to the lowest level sort field. Associated values for higher level sort fields will be included automatically.

   b. Click the plus sign (+) button to create a new drilldown.

   c. Select the *JavaScript* radio button to create a JavaScript drilldown.

   d. In the JavaScript Function text box, type *portalDispatch*.

   e. Add parameters to use in the portalDispatch function.

      Click the plus sign button in the Request Parameters section to add the first parameter.

   f. For the first parameter, change the Type to *Value* using the drop-down menu, and type *navigateToPage* in the Field/Value column.

   g. Add a second parameter by clicking the plus sign button. Change the Type to *Value* and enter the IBFS path to the drill-down target page that you created in Step Two into the Field/Value column.

      You can acquire the IBFS path of the page by right-clicking it in the object explorer on the Web Query Hub clicking *Properties*. Copy the text in the Path field of the Properties panel, then paste it into the Field/Value column for the second drill-down parameter in the Configure Drill Downs dialog box in Web Query Designer.

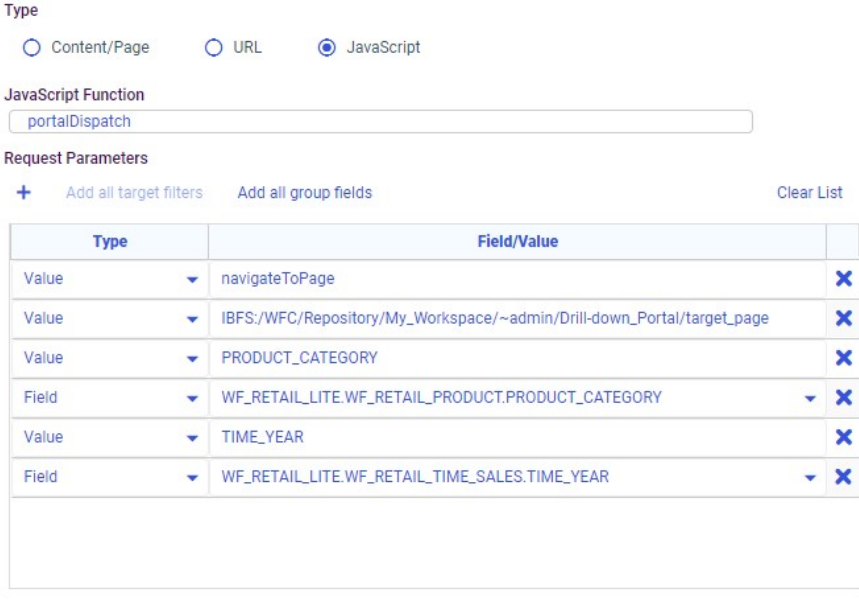
   h. Add a third parameter. Change the Type to *Value* and, in the Field/Value column, type the name of the parameter that you want to pass.

Typically, the parameter name matches the name of the field. You can confirm the parameter name by opening the target page in Web Query Designer, clicking the *Info* button, and noting the parameters listed in the Parameters/Filters category for the items on the page. Alternatively, select a filter control on the page and, on the Settings tab, scroll down to the Parameters section, which shows the name of the parameter associated with the filter control.

i. Add a fourth parameter. Leave the Type as *Field* and select the field in your report that is associated with the parameter that you are passing. This field must be present in the drill-down source content.

j. Optionally, if you wish to pass multiple parameters to the page, for example, if the page contains multiple filters, repeat steps 5h and 5i for each one.

The following image shows the parameters to drill to a page in a portal, passing values for both the PRODUCT_CATEGORY and TIME_YEAR parameters.



6. Click *Apply* to generate the drill-down links.

   The hyperlinks are added to the entries of the selected field.

   Note: The links remain inactive until the drill-down source report or chart is added to a page within the same portal as the target item.

7. Save the report.

Stage Four: Add the Source Report to a Page in the Portal

The drill-down source report or chart should be run within the same portal as its target item. Therefore, it should be added to a page within that same portal.

Procedure: How to Add a Report to a Page in a Portal

1. Create a new page. Click the plus menu and then click *Assemble Visualizations*.

   Web Query Designer opens.

2. Select a page template, or use the Blank template to arrange the content on the page yourself.

   Once you select a page template, the page canvas opens.

3. Add the drill-down source content that you created in Stage Three to the page.
4. Optionally, add other complementary items to the same page.
5. Save the page to the portal folder that you created in Stage Two, and then return to the Web Query Hub.

   Alternatively, you can save the page to another location in your Repository, and instead create a shortcut to that page within the portal folder structure.

6. You may wish to display the drill-down source report on the first page, so that you can quickly navigate to other items within the portal using the drill-down links instead of the portal tabs and menus. To ensure that the page containing this report appears first, set the sort order for the page or shortcut within the portal.

   a. Right-click the page or page shortcut that you want to appear first within the portal, and then click *Properties*.

      The Properties panel opens.

   b. Select the *Advanced* tab of the Properties panel.

   c. Type a numeric value in the Sort order text box.

      Items with lower sort order values appear first. Since we want the page with the drill-down source report to appear first, type a negative value, such as *-1*, into the Sort order text box, causing it to appear before items with the default sort order of 0.

   d. Click *Save* in the Properties panel to apply the new sort order.

Stage Five: Finalize the Configuration of the JavaScript Function

The portalDispatch JavaScript function is defined in a .js file in your Web Query installation. In order for Web Query to find and execute this function, you must configure the path on the Web Query Reporting Server edasprof.prf profile using the JSURLS property. Properties set in edasprof.prf are applied to any procedures run against that Web Query Reporting Server.

Procedure: How to Add a JavaScript File Path to edasprof.prf

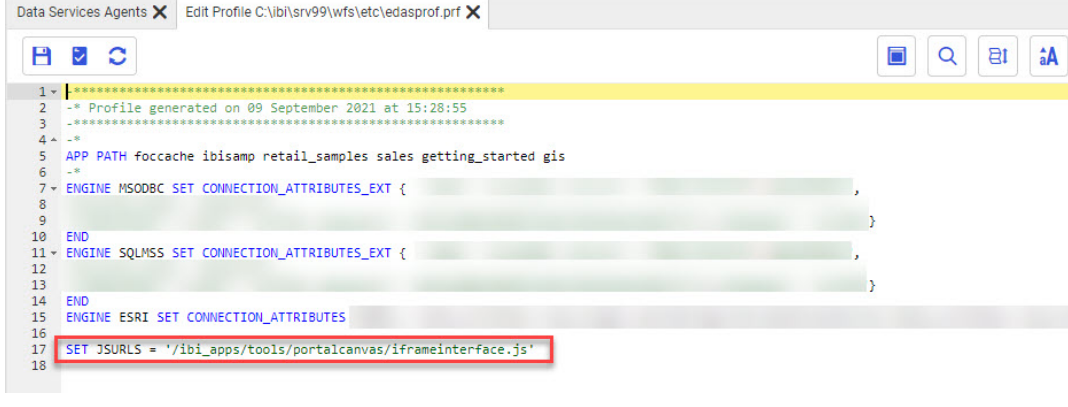
1. On the sidebar of the Web Query Hub, select the *Management Center*.
2. Under the Server Administration section, select *Server Workspaces*. The Workspaces view of the Web Query Reporting Server browser interface opens.

   In the Reporting Server browser interface, open the *Tools* menu , and click *Workspace*.
3. On the Server Workspaces page, in the resource tree, expand *Configuration Files*, right-click *Server Profile - edasprof.prf*, and click *Edit*.
4. On a new line, paste the following text:

   ```
   SET JSURLS = '/ibi_apps/tools/portalcanvas/iframeinterface.js'
   ```

   Note: If your environment does not use the default context root, replace the *ibi_apps* context root in the JSURLS path above with the one used in your environment.

   Once added, your environments edasprof.prf file may resemble the following image.



5. Save your edits to edasprof.prf.

   You can now drill from the drill-down source report to the target page that you created. In the Workspaces view of the Web Query Hub, right-click the portal in the object explorer or Resource tree and click *Run*. When the portal loads, click a drill-down link in the report. The target page loads and is automatically filtered for the value that you selected in the report. To filter the page again for a different filter value, select a new value from the filter control and click the *Refresh* button on the page toolbar.

Publishing Content

When the portal is ready, you must make the portal and related workspaces available by changing them to Published status to make the portal and its contents available to all users with their appropriate level of access.

Procedure: How to Publish a Portal

1. Sign in as an administrator, if you are not signed in already.
2. Right-click the portal in the content section of the Web Query Hub and select *Publish* from the shortcut menu.

Testing the Designer Portal User Experience

Before you can announce availability of the portal for general use, you must first ensure that the appropriate theme and logo are assigned to the portal for users from each tenant group.

Remember that the portal fails to display content properly when you run it in the centralized enterprise workspace. You must base your testing on how the portal appears to users from each tenant group, not in the centralized workspace.

Procedure: How to Test the Portal User Experience

1. Sign in as a user from each tenant group and run the portal.
2. Ensure that the logo, styling, and tenant-specific pages are appropriate.
3. Ensure that common pages are available and conform to tenant-specific styling.
4. If you encounter unexpected results, review the portal and tenant workspace configurations to ensure that your configuration conforms to the shared portal design.
5. Repeat this procedure for each tenant group.

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