IBM Db2 Web Query for i
Introducing Db2 Web Query

Release 2.4.0

Contents

Chapter 1

Welcome to IBM Db2 Web Query for i

Db2 Web Query is the reporting engine that turns corporate data into meaningful information. It enables any executive, manager, analyst, employee, partner, or customer to execute smarter decision-making. The platform delivers many rich new capabilities and integrates the four critical elements that any enterprise needs: business intelligence, performance management, advanced analytics, and data integrity.

Depending on the role you play in your organization, using Db2 Web Query, you can:

- Connect and edit data
- Author reports and visualizations
- Perform predictive and location analytics
- Build applications
- Run and schedule procedures
- Share your data
- And more

In this chapter:

Signing in to Db2 Web Query for i

You can launch Db2 Web Query for i from any web browser, using the address created during the installation. The sign-in page and default start page may be different depending on the configuration requirements of your organization.

Procedure: How to Launch Db2 Web Query for i

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

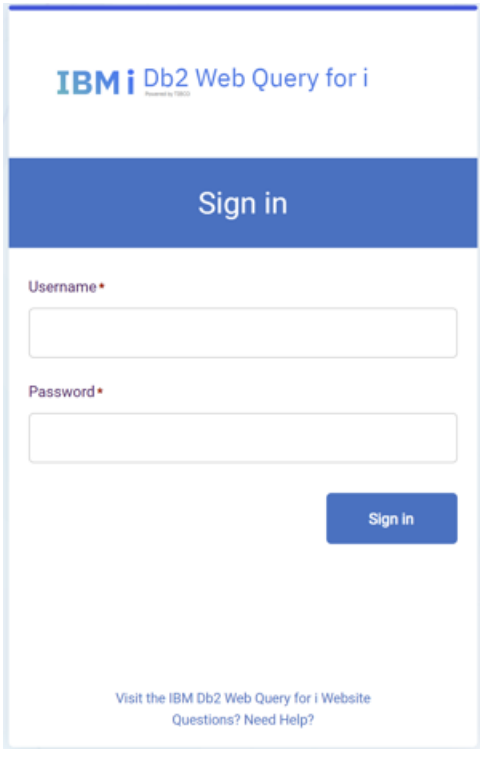
   `http[s]://hostname:12331/webquery`

   where:

   hostname

   Is the host name of the web server or application server.

   The default Sign in page opens, as shown in the following image.



2. Type your user name and password.
3. Click *Sign in*.

The Db2 Web Query for i Hub loads and shows all the content that you are authorized to see.

Note: You can also reconfigure Db2 Web Query to run the Db2 Web Query Home Page, Legacy Home Page, or a custom welcome page after sign-in. This behavior is configured by setting the *Redirect /ibi_apps to* setting on the BI Portal page, in the Administration Console.

Navigating the Db2 Web Query for i Hub

The Db2 Web Query for i Hub is the default landing page that opens when you first sign in to Db2 Web Query. It serves as a centralized place for working with your data, creating and organizing content, scheduling reports and procedures, and performing administrative tasks.

The main elements of the Hub are:

- Banner
- Home area
- Workspaces area
- Application Directories area
- Portals area
- Management Center area

Banner

The banner, shown in the following image, is located on the top of your Web Query Hub. It is accessible from every view of the Hub.

The hamburger button, located in the upper left corner, takes you to the Main Menu. Here you can navigate to the areas of your Hub. This menu also gives you direct access to the Web Query tools, such as InfoAssist, Report Broker Status, and Report Broker Explorer.

The plus button opens the New menu, which provides access to the following options and tools.

- **Create Visualizations.** Opens Db2 Web Query for i Designer in Author mode so you can start creating new content from data.
- **Assemble Visualizations.** Opens Db2 Web Query for i Designer in Assemble mode allowing you to assemble visualizations from existing content.

- **Get Data.** Opens the Get Data dialog box, where you can upload a file or create a data connection to an existing database.
- **Get Data (Advanced).** Opens the Get Data dialog box in advanced mode, where you can upload a file or create a data connection and edit the synonyms.
- **Create Data Flow.** Opens the Db2 Web Query Reporting Server, where you can create a new data flow.
- **Create DBMS SQL Flow.** Opens the Db2 Web Query Reporting Server, where you can create a new DBMS SQL flow.
- **Create Cluster Business View.** Opens the Db2 Web Query Reporting Server, where you can configure a cluster business view.
- **Explore Data.** Opens the Explore Data tool, where you can ask questions and get answers about data.

Next to the plus button, you can see the name of the area that is currently on display.

In the Workspaces area, the banner also displays the View toggle, which allows you to switch between Normal and Admin views of your resources.

- **Normal view.** The view of the repository that allows you to see and manage your own private content. This setting is enabled by default.
- **Admin view.** The view of the repository that allows you to see and manage the private content of other users.

Note: The View toggle is only visible to administrators.

In the right corner of the banner, you can access the following buttons and menus.

Tools

The Tools button provides access to the following menus.

- **Stop Requests.** Terminates outstanding interactive requests that are running.
- **Manage My Agents.** Navigates to the Db2 Web Query Reporting Server in a new browser window, where you can view and manage your agents.
- **FOC Message Lookup.** Displays the text or explanation for any error message.
- **Runtime Environments.** Provides a way for DB2 Web Query users to quickly, easily, and dynamically change the user portion of a library list prior to retrieving the data from the database.

- **View Sessions.** Opens the Session Viewer in a new browser window, which shows the status of the current session.
- **Edit My Profile.** Enables you to make changes to your current server user profile settings.
- **Session Log.** Provides access to the following options:
  - **View Session Log.** Navigates to the Server Session Log in a new browser window where you can view your session log.
  - **Clear Session Log.** Clears the current session log.
- **View Login Info.** Opens the View Login Info in a new browser window, where you can see information about the Web Query instance you are currently running.

Help

The Help button provides access to the following menus.

- **Help.** Provides access to the following options:
  - **Web Client Help.** Opens the Db2 Web Query for i Online Help plugin in a new browser window.
  - **Reporting Server Help.** Opens the Db2 Web Query Reporting Server Help plugin in a new browser window.
- **Community.** Opens the IBM Db2 Web Query for i Wiki in a new browser window.
- **Technical Resources.** Opens the IBM Community Home page in a new browser window.
- **About Db2 Web Query.** Opens the About Db2 Web Query dialog box, which contains information about the current release of the product, as well as Web Client and Reporting Server details. You can select a Reporting Server from the Server selection drop-down list, located inside the Reporting Server Detail tab of the About Db2 Web Query dialog box.

User Profile

The User profile button contains the following action menus.

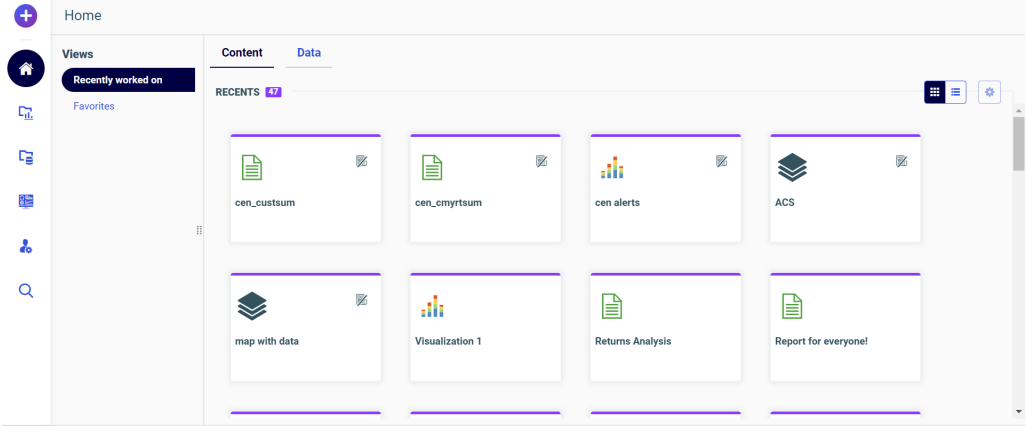
- **Switch Home Page.** Provides access to the following options.
  - **Db2 Web Query Home Page.** Opens the Db2 Web Query Home Page in a new browser window.
  - **Legacy Home Page.** Opens the Legacy Home Page in a new browser window.

- **Change Language.** Opens the Change Language dialog box, where you can change the language of your Db2 Web Query environment.
- **Change Password.** Opens the Change Password dialog box, where you can reset a password for your account.
- **Reset View.** Resets the Hub to the default view and displays the Home area with the Recents view in focus.

  Note: By default, the last place you visited on the Hub is remembered by Db2 Web Query and opens automatically when you return to your environment. Clicking *Reset View* deletes the memory of your previous Hub location.
- **Sign Out.** Signs you out of Db2 Web Query.

Home Area

The Home area is what you see when you first login to Db2 Web Query. It provides quick access to the items that you worked on and your private and favorite content. An example of the Home area is shown in the following image.



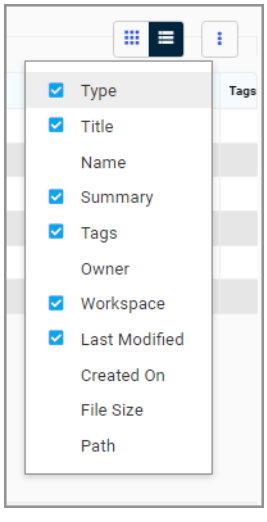
The Home area is comprised of the following views:

- Recently worked on
- Favorites

When you create a new item, edit an item, or run an item anywhere in the environment, this item appears in the Recently worked on view, which consists of two tabs: Content and Data. Under the Content tab, you can see recent items from the Web Query Client side. The Data tab displays recent items from the Reporting Server. Both types of items have shortcut menus that vary depending on the nature of the item and your permissions. You can remove an item from this view by right-clicking it and clicking *Remove from Recents*.

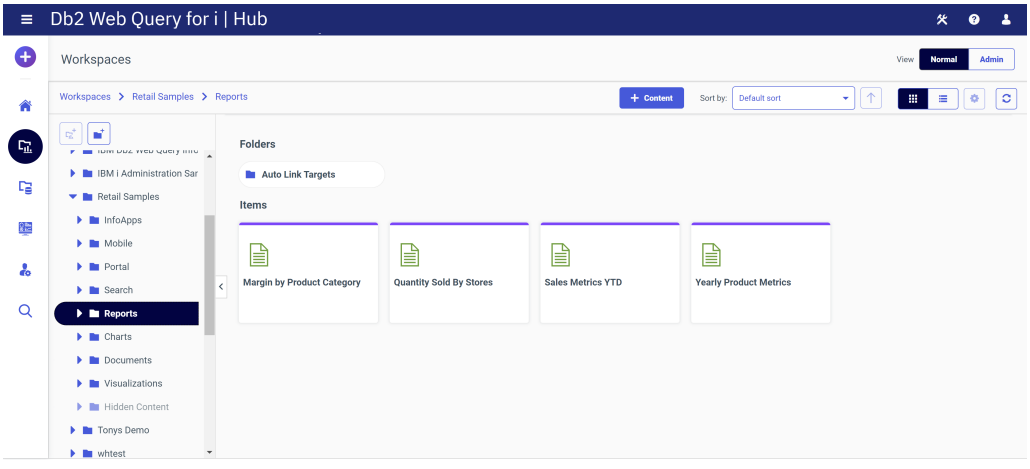
Saving content items as favorites anywhere in the environment automatically adds them to the *Favorites* view. Similar to the *Recently worked on* view, your *Favorites* are divided into two tabs: Content and Data. Under the Content tab, you can see the items that you saved as favorites from the Web Query Client side. The Data tab displays the favorite items from the Web Query Reporting Server. To save an item as a Favorite, right-click it and then click *Add to Favorites*. To remove an item from the *Favorites* view, right-click it and then click *Remove from Favorites*.

Everywhere in the Home area, you can switch between the tile and list views, by clicking the *Switch to list view* and *Switch to tile view* icons in the upper-right corner of the canvas. In the list view, you can sort each column by clicking the column title. You can also specify which columns display in the list by clicking the *Select columns displayed* button and selecting the desired columns from the list. An example of an expanded columns menu is shown in the following image.



Workspaces Area

The Workspaces area is where most of your content management takes place. Here, you can organize your repository structure, create and interact with content items, create sample content, work with data, and perform other tasks. The Workspaces area is shown in the following image.

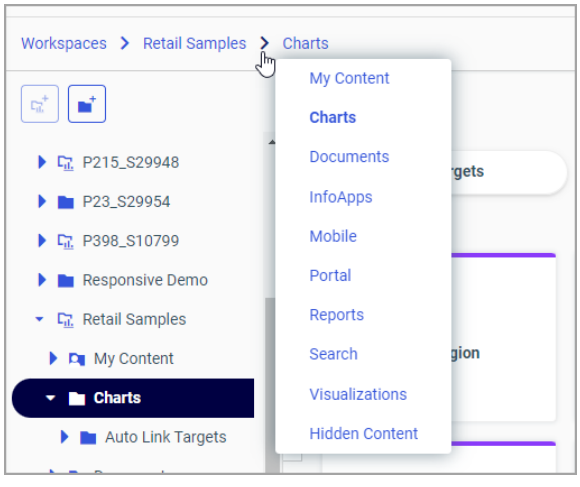


Page Toolbar

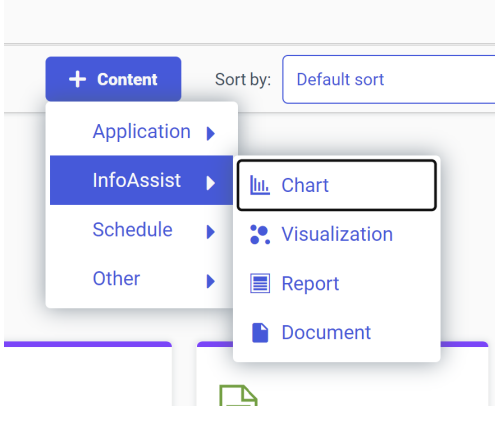
The page toolbar is shown in the following image.

You can use the page toolbar to move between folders in your repository, create and sort content, search the contents of a workspace or folder, change the view of items in the content section, and refresh content in a workspace or folder you select.

When you drill into the folders in your repository, the page toolbar generates a breadcrumb trail that you can use to move between folders. You can move back one folder or multiple folders in a single click. You can click a folder name to view the contents of that folder. You can also click arrows between the folders, to see the file structure that is currently displaying, as shown in the following image. In this example, the selected folder appears in bold.



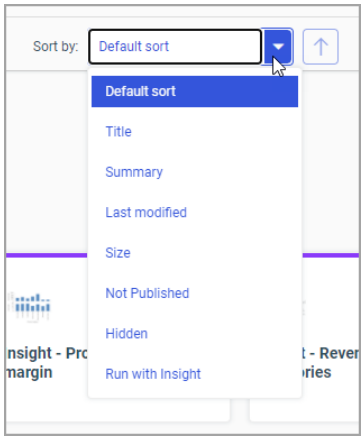
You can use the + *Content* button to create analytical content with InfoAssist, upload files and spreadsheets, connect to data, build portals and pages, schedule procedures, and generate sample content using the options available to you for a workspace or folder. The following image shows an example of the + *Content* menu an advanced or basic user has access to for a workspace or folder.



The + *Content* menu only displays the items that you can create for the workspace or folder that is currently selected. The items displayed in the + Content menu are also subject to permissions. You can only see the items that are available to you based on your role.

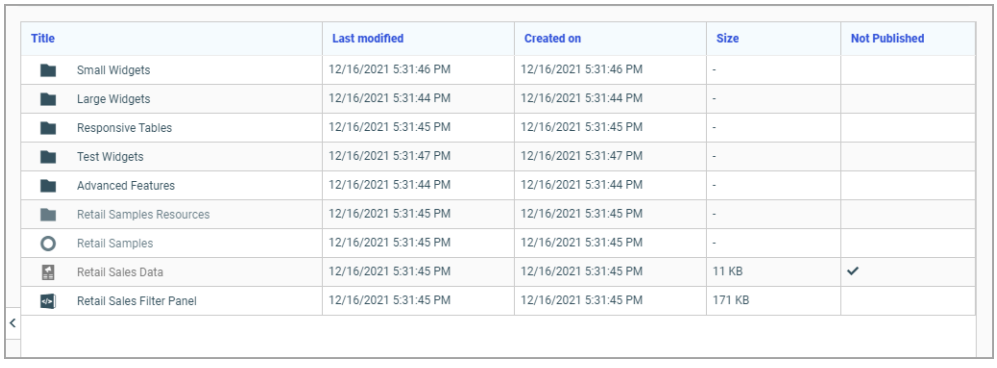
You also can toggle the view of your content between tile view and list view in a workspace or folder. By default, content displays in tile view. Click the *Tile view* icon or *List view* icon to change your view.

The tile view allows you to see the thumbnails of your items, which you can customize to add transparency to your display. You can sort the items in the tile view by using the *Sort by* drop-down list shown in the following image. Once you select a sort option other than the default one, you can reverse the sort order by clicking the *Reverse sort order* button.



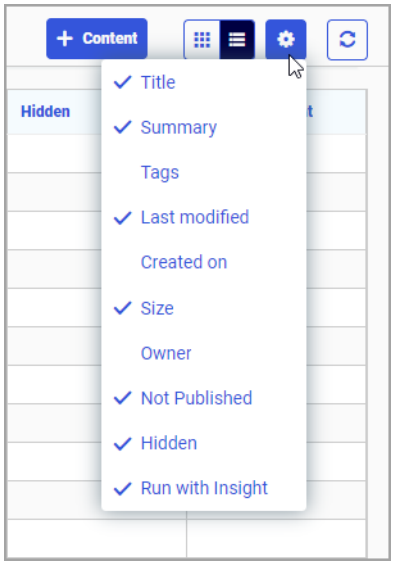
Note: You can also create a customized sorting order, by configuring the Sort Order property for the item.

The list view is useful when you need to see a large number of items at a glance. You can easily identify the item types by their icons, which mirror the icons in the + *Content* menu. An example of a list view is shown in the following image.



Title	Last modified	Created on	Size	Not Published
Small Widgets	12/16/2021 5:31:46 PM	12/16/2021 5:31:46 PM	-	
Large Widgets	12/16/2021 5:31:44 PM	12/16/2021 5:31:44 PM	-	
Responsive Tables	12/16/2021 5:31:45 PM	12/16/2021 5:31:45 PM	-	
Test Widgets	12/16/2021 5:31:47 PM	12/16/2021 5:31:47 PM	-	
Advanced Features	12/16/2021 5:31:44 PM	12/16/2021 5:31:44 PM	-	
Retail Samples Resources	12/16/2021 5:31:45 PM	12/16/2021 5:31:45 PM	-	
Retail Samples	12/16/2021 5:31:45 PM	12/16/2021 5:31:45 PM	-	
Retail Sales Data	12/16/2021 5:31:45 PM	12/16/2021 5:31:45 PM	11 KB	✓
Retail Sales Filter Panel	12/16/2021 5:31:45 PM	12/16/2021 5:31:45 PM	171 KB	

In this view, you can sort your items by clicking any column title. Each column features a three-step toggle sorting: ascending, descending, and return to the default. You can also specify which columns display in the content section by clicking the *Select Display Columns* button, and selecting the columns you want to view from the list. An example of an expanded columns menu is shown in the following image.

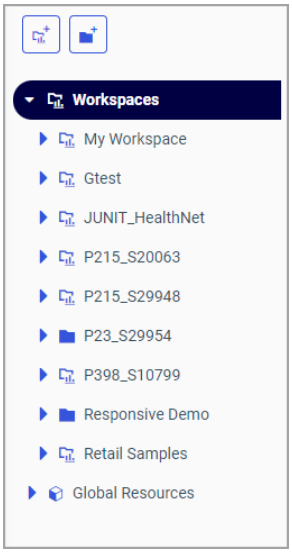


When you hover over an item that contains a summary, this summary displays as a tooltip in both tile and list views.

Finally, to refresh all content in a selected workspace or folder, click the *Refresh* button.

Resources Tree

The Resources tree provides a way to view your repository structure and navigate between workspaces and folders that are available to you. The following image shows an example of a Resources tree.



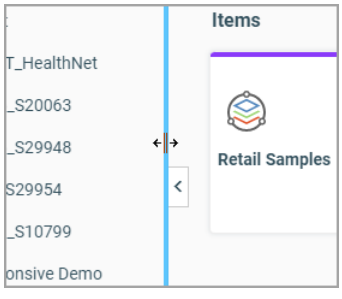
You can use the *New workspace* button and *New folder* button on top of the Resources tree to add new workspaces and folders to your repository. These buttons mirror the icons for workspaces and folders that display inside the tree.

You can expand or collapse workspaces and folders by clicking the arrows next to them. When you click a folder, its contents display in the content section. You can also right-click a folder to access a shortcut menu of available options. From the shortcut menu, you can perform the following actions:

- Expand or Collapse a folder
- Duplicate a folder
- Cut or Copy a folder
- Paste content or another folder inside a folder
- Delete a folder

- Allow or suppress access to a folder
- Show or hide a folder
- Configure security rules for a folder
- View and edit properties for a folder

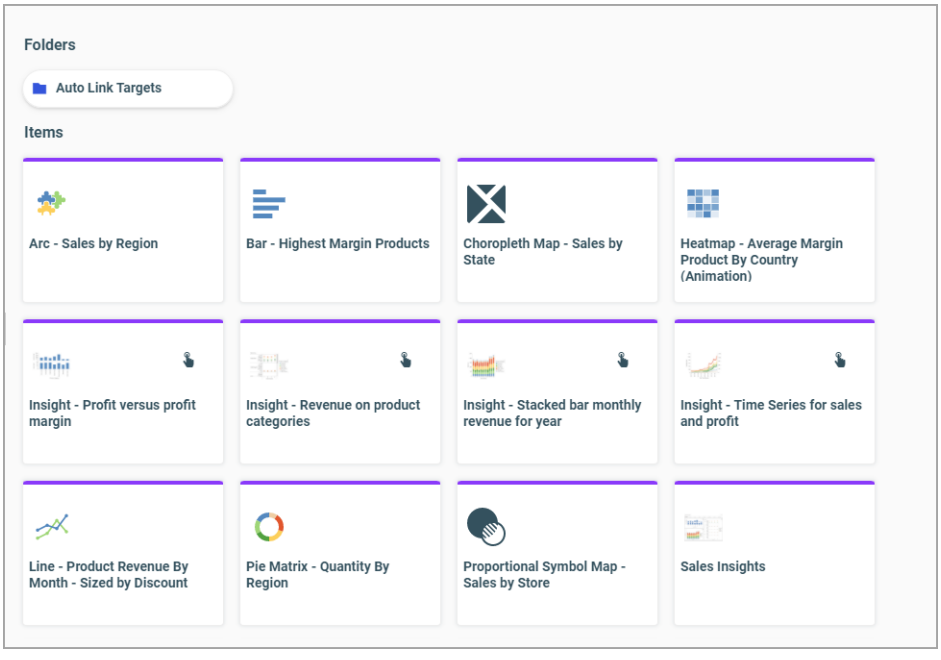
You can also customize the width of the Resources tree. To do so, place your cursor on top of the right edge of the Resources tree area, as shown in the following image, and drag the edge to achieve the desired width. Your new width is remembered, and displays the next time you sign in to Web Query.



You can also collapse the Resources tree to allow more room for the content section. To collapse the Resources tree, click the arrow on the right side of the tree. Click the arrow again to expand the Resources tree.

Content Section

The content section displays the items contained within a workspace or folder that is currently selected. An example of the content section is shown in the following image.



If a resource contains folders and items, the folders are always displayed first, followed by the items. Items shown in the content section include reports, charts, pages, portals, and more.

You can right-click any folder or item to access the shortcut menu of options. The following options are available when you right-click a folder or item in the content section.

Expand/Collapse

Expands or collapses a folder. This option is only available for folders.

Run

Runs the report procedure or schedule.

Run in new window

Runs the selected item in a new browser window or tab.

Run with SQL trace

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

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

Schedule

Launches the scheduling tool, where you can schedule a report procedure to be run. Scheduling options include Email, FTP, Printer, and Repository.

View log

Launches the Schedule Log Options dialog box, where you can select whether to view the most recent log report for the schedule, or specify a time range for which to obtain log reports. This option is only available for schedules.

Edit

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

Edit with text editor

Edits an item in the Text Editor.

Duplicate

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

Cut, Copy, and Paste

Cuts, copies, or pastes the folder and its contents or item.

Delete

Deletes the folder and its contents or item.

Publish/Unpublish

Allows or suppresses public access to the content.

Show/Hide

Shows or hides the folder or item.

Security

Provides access to the following option:

Owner

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

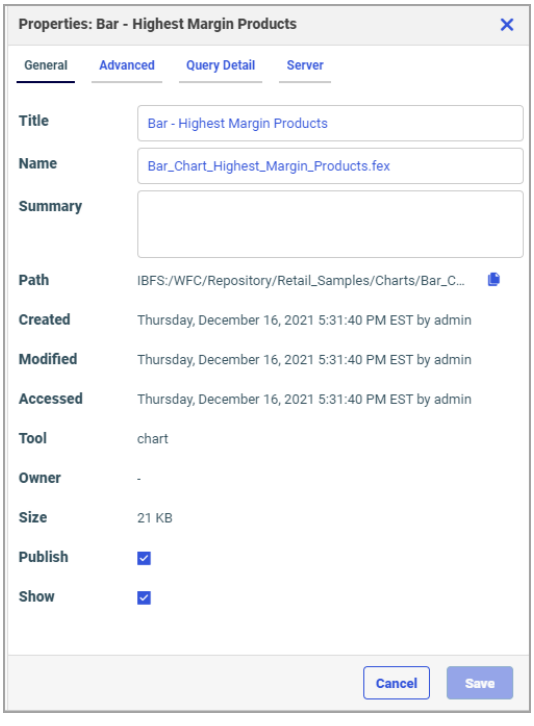
Properties

Opens the Properties panel to display the properties of the folder or item.

Folder and Item Properties

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

The following image shows the Properties panel for a bar chart.

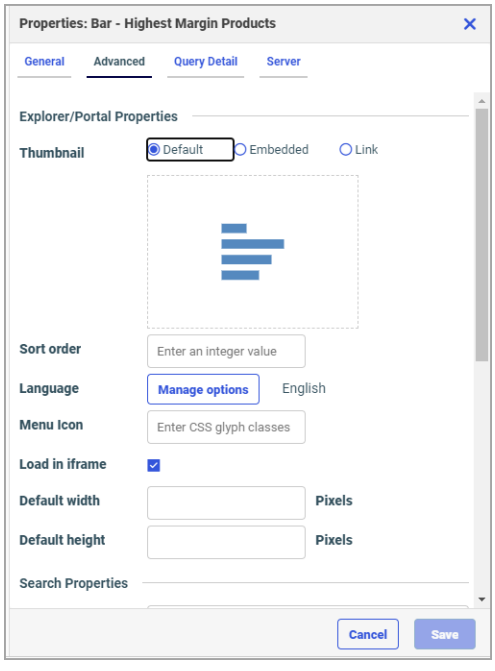


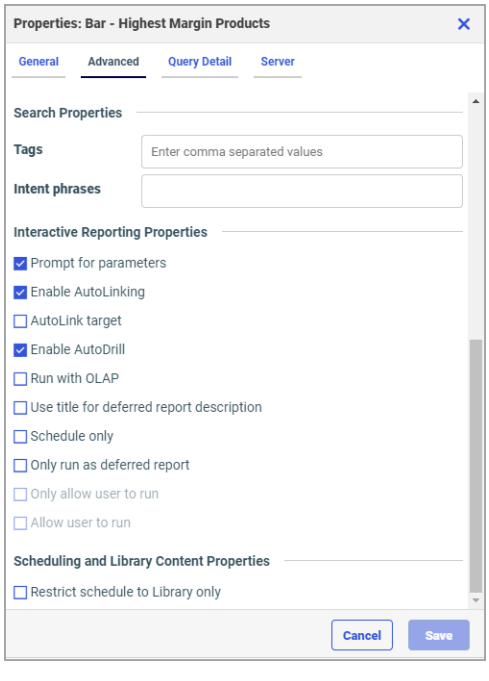
The General Properties tab includes the following settings:

- **Title.** Displays the value that you can use to identify the content in the Resources tree.
- **Name.** Refers to the unique name of the item or folder. You can change the name of the resource by editing this field.
- **Summary.** Displays a detailed explanation that provides additional information about the item.
- **Path.** Contains the full path of the folder or item in the Web Query repository and the *Copy path* button.

- **Created.** Shows the date the folder or item was created.
- **Modified.** Shows the date the folder or item properties were last modified, and identifies the user that modified them.
- **Accessed** Shows the date the folder or item was last opened, and identifies the user that opened it.
- **Owner.** Identifies the user who created the folder or item.
- **Size.** Displays N/A bytes for folders. For items, displays the size in bytes.
- **Publish.** Provides an option to publish or unpublish the folder or item. An unpublished item displays the Not Published icon  in the tile view and a checkmark in the Not Published column in the list view.
- **Show.** Provides an option to show or hide the folder or item. A hidden item displays the Not Shown icon  in the tile view and a checkmark in the Hidden column in the list view.

The Advanced tab, which is shown in the following images, allows you to customize the functionality and behavior of the folder or item.





The Advanced Properties tab includes the following properties.

Explorer/Portal Properties:

- **Thumbnail.** Allows you to preview and change the thumbnail for an item.
- **Sort order.** Specifies the order to list the folder in the tree or item within other items in a folder.

  Note: The sort order setting does not take effect in the Portals view. It is only valid in the Content, and Favorites views.
- **Display Language.** Indicates the current language of your environment and contains the *Manage options* button, which opens the Language Properties dialog box, where you can select a language.
- **Menu Icon.** Allows you to enter a CSS class for a custom menu icon that will display in the list view.
- **Load in iframe.** Grants or suppresses permission to load an item in an iFrame container.
- **Default width.** Sets a default width value for the item, when it is displayed inside a portal at run time.
- **Default height.** Sets a default height value for the item, when it is displayed inside a portal at run time.

Search Properties:

- **Tags.** Adds tag values to the items that display in the search results and portal lists.

Interactive Reporting Properties:

- **Prompt for parameters.** Indicates whether to display the Autoprompt HTML page to allow the user to view and select parameter values. When this check box is clear, users will still be prompted if there are any parameters that do not have a value supplied.
- **Enable AutoLinking.** Establishes drill-down links from column data to the target reports that you link together.
- **AutoLink target.** Identifies a report as the target report that is run when the drill-down link is triggered.

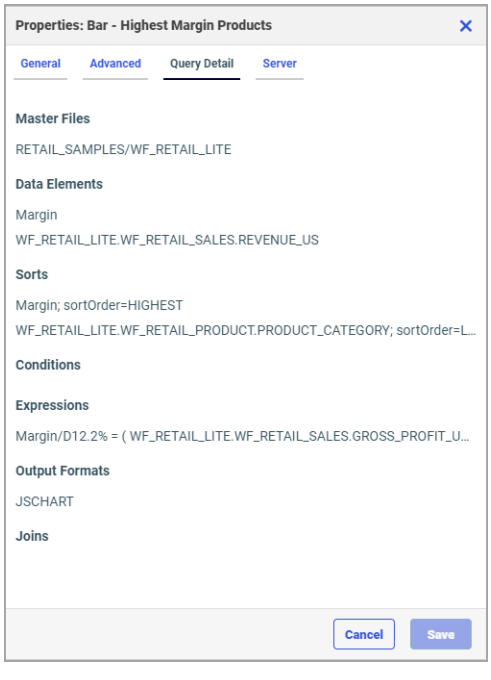
  Note: The Auto Linking between reports only works if the target report contains a parameterized field that corresponds to one of the fields in the primary Auto Link report.
- **Enable AutoDrill.** Creates drill-down links in reports and charts that contain hierarchical data.

- **Run with OLAP.** OLAP-enables the report.
- **Use title for deferred report description.** Indicates whether or not to prompt for a custom deferred report description. If selected, this option gives you an alternative to being prompted for a custom deferred report description.
- **Schedule only.** Indicates that the report can only be scheduled using ReportCaster when the user does not have write access. This option is not available for reporting objects.
- **Only run as deferred report.** Runs the report in deferred mode.
- **Only allow user to run.** Specifies to not allow users to use Web Query with a reporting object.
- **Allow user to run.** Allows a user not permitted to access the Reporting Object tool to run the reporting object interactively, using the Run or Run Deferred options.

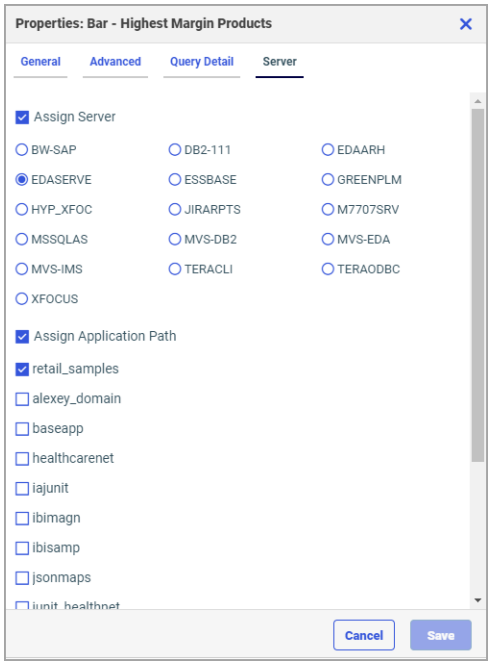
Scheduling and Library Content Properties:

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

The Query Detail Properties tab, which is shown in the following image, is only available for reports, charts, and visualizations. It shows which data elements, parameters, and conditions were used in an item.



The Server Properties tab, which is shown in the following image, allows you to manage the server and application path settings.

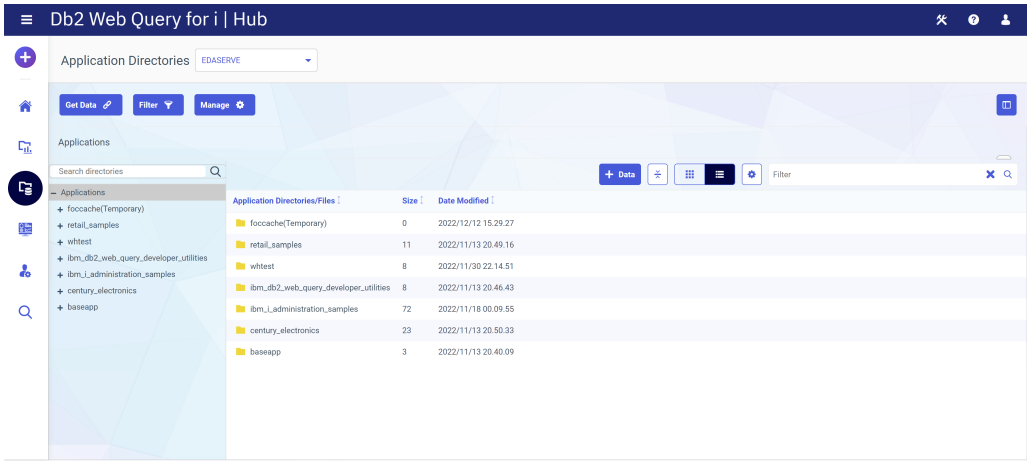


To change the server, select the *Assign Server* check box, and then select a server from the list. You can also change the application path in the same way.

By default, the Properties panel remains open while you browse between folders and items, allowing you to configure several resources quickly without closing the panel. To close the Properties panel, click the *Close* button in the upper-right corner of the panel.

Application Directories Area

The Application Directories area opens the Reporting Server browser interface, where you can select a server from the list of configured Reporting Servers, as well as view and manage your server environment. The Application Directories area is shown in the following image.

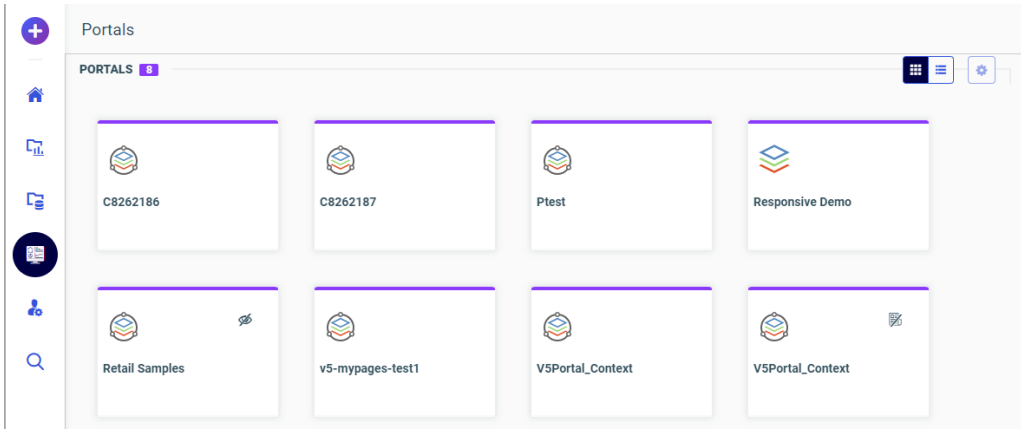


From this area, you can perform the following tasks:

- ❑ Select a reporting server from the server selection drop-down list, located in the banner of the area.
- ❑ Select, add, and configure data adapters.
- ❑ Create and manage adapter metadata.
- ❑ Control data access and security.
- ❑ Configure remote servers.
- ❑ Configure, edit, and run applications and deferred query processing.
- ❑ Configure communications and special services.
- ❑ Operate, monitor, tune, and troubleshoot your server.
- ❑ Edit configuration files.
- ❑ Migrate from a previous server release.
- ❑ Control aspects of your own environment.

Portals Area

The Portals area displays all the portals that are currently available in your repository in one centralized location. Depending on your permissions, you can run and edit a portal from this directory. You can also add a portal to Favorites and view its properties. An example of the Portals area is shown in the following image.



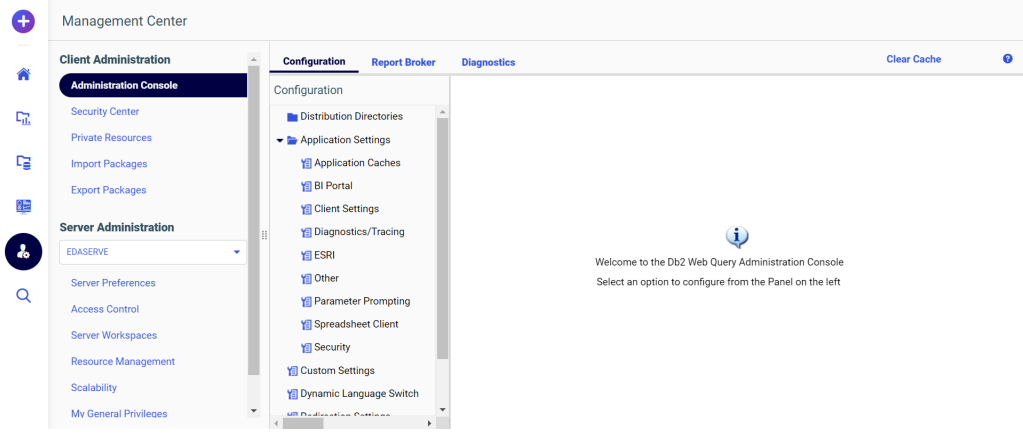
Note: If you need to create a basic portal in your environment, you must do that from the Portals node of the Legacy Home Page.

In the list view, you can modify your display by using the *Select Display Columns* button and selecting the columns that are useful for this type of content. For example, you can add the Path column and use the values displayed in this column to build a direct shareable URL to a specific portal.

Management Center Area

The Management Center area contains tools for configuring your Web Query Reporting Server and Web Query Client administrative options. This directory is only visible to administrators.

The Management Center area is shown in the following image.



On the left side of the screen, you can access the menu, which is divided in two sections:

- **Client Administration.** Contains options for configuring the Web Query Client.
- **Server Administration.** Contains options for configuring the Web Query Reporting Server.

The Client Administration section provides access to the following options:

- **Administration Console.** Opens the Administration Console, where you configure, administer, and monitor the components of the Web Query environment.
- **Security Center.** Opens the Security Center where you can define users and groups, and grant access permissions.
- **Private Resources.** Opens the Manage Private Resources window, where you can view and administer private resources for groups and users.
- **Import Packages.** Provides access to the Import facility of the Change Management feature, where you can upload and import files and packages.
- **Export Packages.** Provides access to the Export facility of the Change Management feature, which is used for moving application components between Web Query environments.

The Server Administration section provides access to the following options:

- **Server Selection List.** Allows you to select among Reporting Servers that are currently configured in your environment.

- **Server Preferences.** Opens the Web Query Reporting Server Preferences interface, where you can indicate preferences for Run Options, Reporting Server browser interface appearance, Reporting Options, and Diagnostic Options.
- **Access Control.** Opens the Access Control page of the Reporting Server browsing interface, where you can manage security providers, edit Access Control and Encryption settings, as well as register and show privileges for users, groups, and roles.
- **Server Workspaces.** Opens the Server Workspaces page of the Reporting Server browsing interface, which provides a complete list of system variables and global variables.
- **Resource Management.** Provides access to the Resource Management tools, Resource Analyzer and Resource Governor. These tools allow you to discover how your data is being used, and then use that information to optimize your environment and improve performance.
- **Scalability.** Opens the Scalability page of the Reporting Server browsing interface, where you can stress-test your environment and run diagnostic procedures.
- **My General Privileges.** Shows the privileges set by the Server Administrator for the user who is logged in to the current Reporting Server browser interface session. Privileges can be customized for each role, group, or user.
- **My Directory/File Privileges.** Shows the existing my directory/file privileges from the current Reporting Server browser interface session.

Configuring and Using Your Db2 Web Query Environment

From the Db2 Web Query Hub, you can create new folders to organize content in your environment. You can also add thumbnails to view content easily, and add content to the Favorites view.

This topic provides information about how you can create configure folders, and further customize and use your Db2 Web Query environment.

Creating New Folders

Your Db2 Web Query Hub is the central location for all Db2 Web Query tasks. Setting it up in a way that is convenient, secure, and efficient helps you get the most out of your work. The Workspaces area opens the content section, and provides access to the available workspaces. Workspaces and folders that are located in the Resources tree organize all of your content items. Authorized users can create additional folders, as well as customize the default structure of their view.

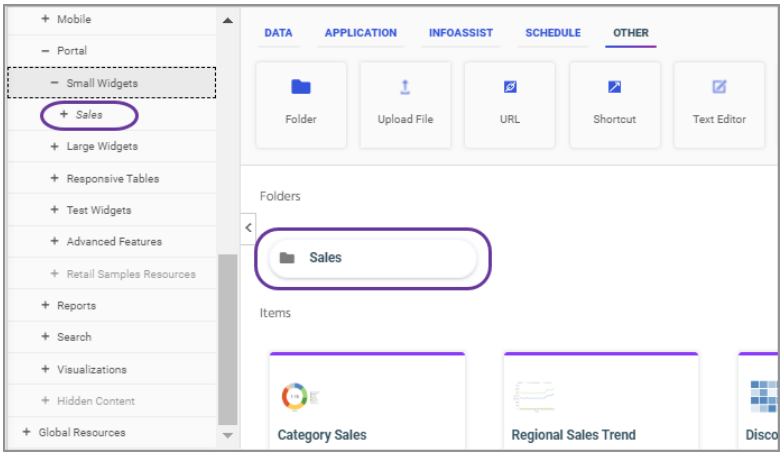
Procedure: How to Create a Folder

1. In the Resources tree, select the workspace where you want to create a new folder.
2. Click the *New* folder button above the Resources tree. Alternatively, click the + *Content* button, point to *Other*, and then click *Folder*.

   The New Folder dialog box opens.
3. Type a Title for your folder.

   The Name field populates with the same text, automatically. You can edit the Name at any time.
4. Click *OK*.

   The new folder is created and is now available in the Resources tree. A new folder is not published by default, so when it first appears in the content section, it appears with a grayed-out icon. Additionally, the title shown in the Resources tree is italicized. An example of a new folder is shown in the following image.



   To publish a new folder, right-click it, and then click *Publish*. By default, when you publish a folder, you automatically publish all its contents as well.

Dragging and Dropping Folders and Files

You can drag and drop folders or files from the content section to other folders within the content section, or to other folders within the repository tree. You can also drag and drop folders from the repository tree to other folders within the repository tree, or to other folders within the content section.

You can drag and drop items, or press and hold the *Ctrl* key to drag and drop copies of items. Drag and drop functions the same as the cut-and-paste options from the context menu. Drag and drop while holding the *Ctrl* key functions the same as the copy-and-paste options from the shortcut menu.

Note: You can select multiple items by holding the *Ctrl* key while selecting each item.

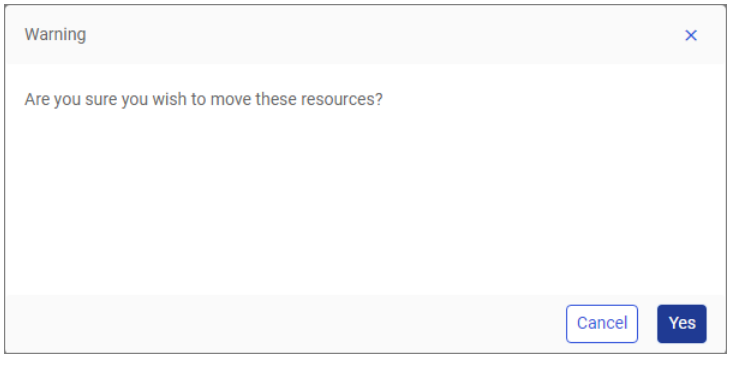
Dragging Indicators

When dragging an item, a thumbnail displays for that specific item type. If you select multiple items, a thumbnail for one of the dragged items displays.

If you drag an item over an area where it cannot be dropped, a No icon displays.

Dropping Indicators

When dropping an item, a Warning message displays, as shown in the following image:



Click *Yes* to move the item.

Click *Cancel* to cancel the operation.

Adding Content to Favorites

You can create a list of favorites to easily access the items that are most important to you. When you save content as a favorite, it automatically appears in the Favorites view of the Home area. Here, you can interact with your content and view its properties.

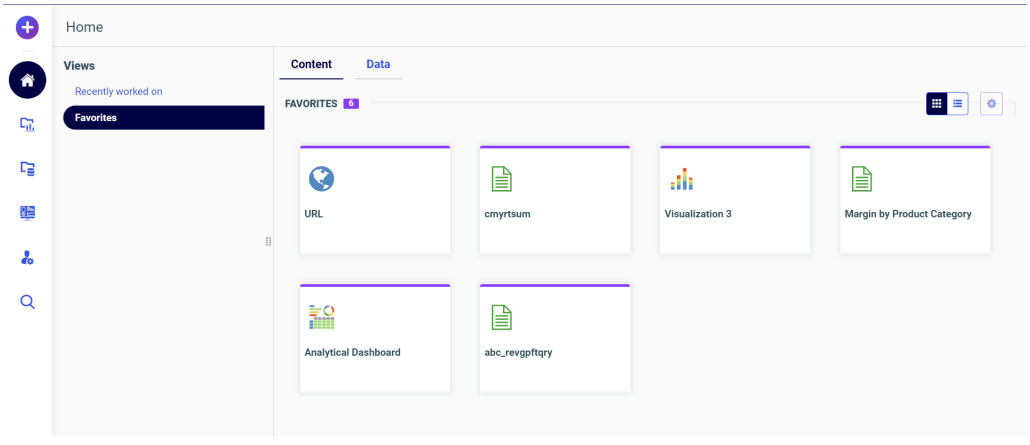
Procedure: How to Add Content to Favorites

1. Right-click an item in the Home, Portals, or Workspaces area of the Db2 Web Query Hub, and then click *Add to Favorites*.

   Note: Standalone portal pages cannot be added as favorites.

2. Navigate to the Home area by clicking the Home icon on the side navigation bar or by selecting *Home* from the hamburger menu.

   The Favorites view is already selected and the item is displayed, as shown in the following image.



   If you right-click the item, a shortcut menu of options opens. Here, you can do the following:

   - Click *Run* or select a different way to run the item by pointing to *Run...*.
   - Click *Edit* or *Edit with text editor* to edit the item in the appropriate tool or text editor.
   - Click *Remove from Favorites* to remove the item from Favorites.
   - Click *Properties* to open the Properties panel, and edit the properties of the item.

Adding Thumbnails to Content Items

To provide additional context to your items and simplify navigation, you can add custom thumbnails to your content items. These thumbnails might be created from any image files on your machine. You can also create thumbnails from the image files that can be found in your repository.

There are two types of thumbnails in Db2 Web Query:

- **Default.** Assigned to an item by Db2 Web Query in the absence of a custom thumbnail.
- **Custom.** Created either from an uploaded image or linked to an item in your repository.

Thumbnails are only visible in the tile view.

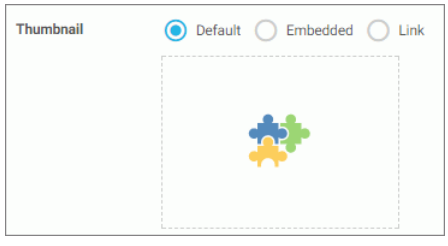
Procedure: How to Add Thumbnails to Content

1. Right-click a content item to which you want to add a thumbnail, and then click *Properties*.

   The Properties panel opens.

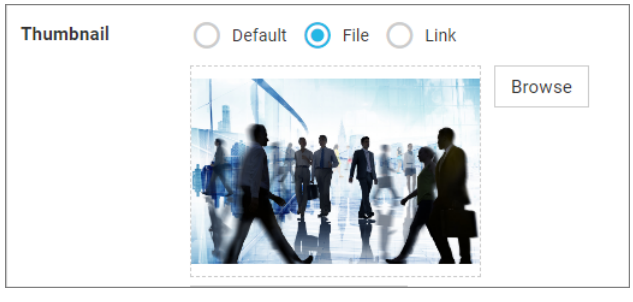
2. Click the *Advanced tab*.
3. In the Thumbnail property, choose one of the following options:

   - **Default.** Populates the thumbnail with the default graphic, as shown in the following image. This is a default option.



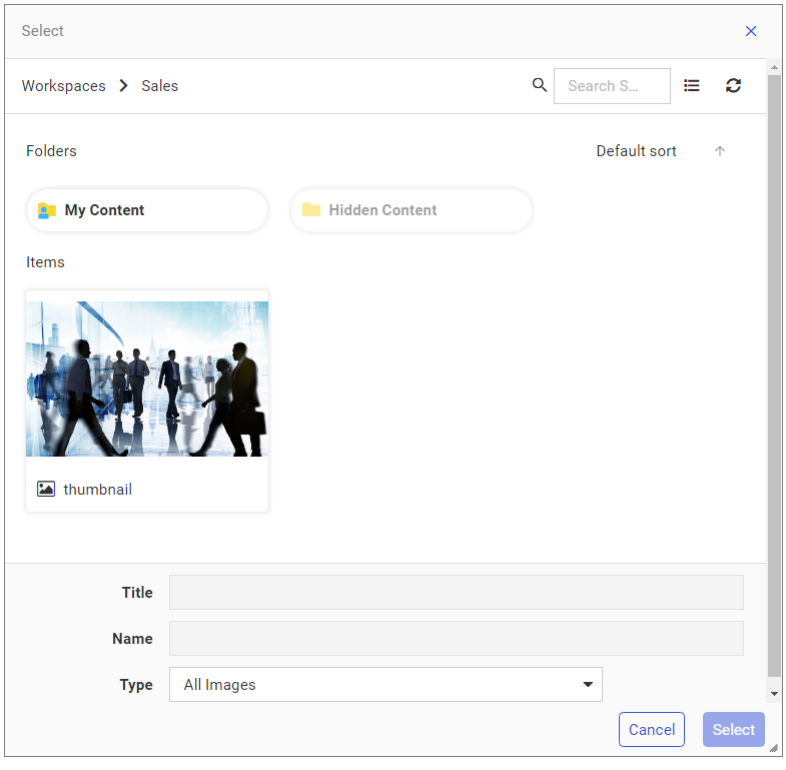
   - **Embedded.** Enables you to choose a custom image from your machine.

     In the Open dialog box, select an image file and click *Open*. The custom image displays in the preview section of the Thumbnail property, as shown in the following image.



     To change an image, click *Browse* and select another image file.

- **Link.** Opens the Select dialog box, where you can navigate to any available image file in your repository, as shown in the following image.



To change an image, click *Browse* and select another image file in your repository.

4. Once the thumbnail is selected, click *Save* in the Properties panel.

   The thumbnail displays in your repository.

Assigning Tags to Content Items

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

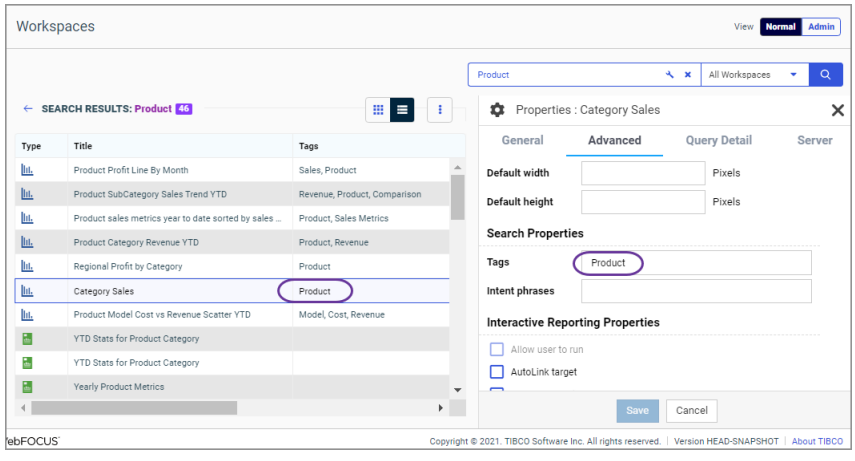
Procedure: How to Assign Tags to Content

1. Right-click a content item that you want to assign to a tag, and then click *Properties*.

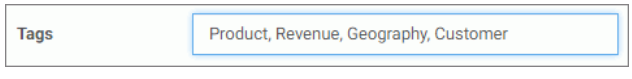
   The Properties panel opens.

2. Click the *Advanced* tab.
3. In the Tags field, type the name of your tag, and then click *Save*.

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



   You can assign multiple tags to a single item, by separating them with a comma, as shown in the following image.



Creating URLs

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

Note: Some web pages cannot be run inside an iFrame or inside the preview Run window on the Db2 Web Query Hub. You can run these web pages in a new browser tab or window.

Procedure: How to Create a URL

1. Select the workspace or folder where you want your new URL to reside.
2. In the + Content menu, point to *Other*, and click *URL*.

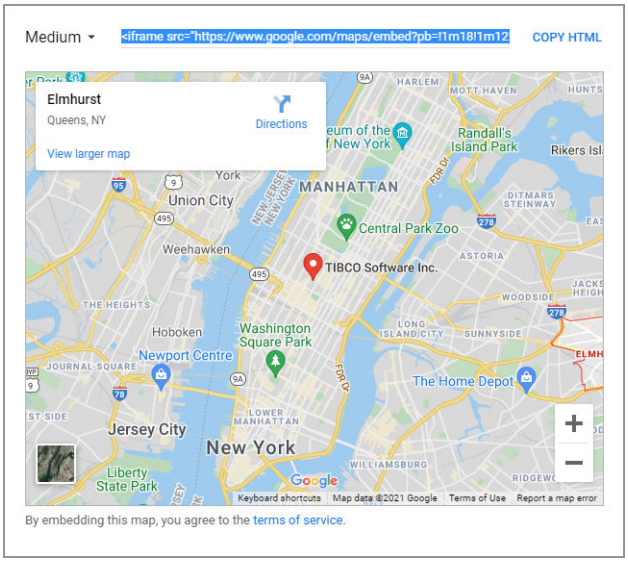
   The New URL dialog box opens.

3. Type a Title for the URL, type the address of the URL, and then click *OK*.

   The URL now appears in your selected location.

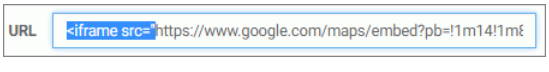
Procedure: How to Embed an iFrame-Optimized URL in a Portal or Page

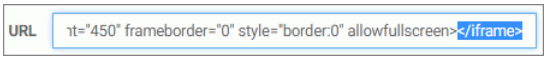
1. Copy an iFrame-optimized URL from the web, as shown in the following image.



2. Select the workspace or folder where you want your new URL to reside.
3. In the + Content menu, point to *Other*, and click *URL*.

   The New URL dialog box opens.
4. Populate the Title field, and paste the copied URL in the URL field.
5. Remove any iFrame related syntax that surrounds your URL. Examples are shown in the following images.





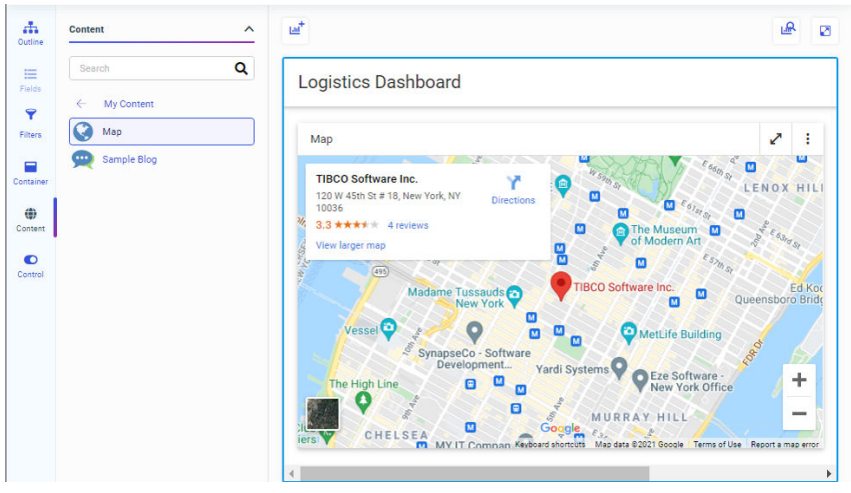
6. Click *OK* to close the New URL dialog box.

   Your URL item is complete and ready to be displayed in a portal or page.
7. Click the plus button and then click *Assemble Visualizations*.

   The Designer opens.

8. Add your new URL to the page.

   The URL content displays within the container, similar to other content items, as shown in the following image.



Note: This procedure is applicable to portal pages.

Uploading Files

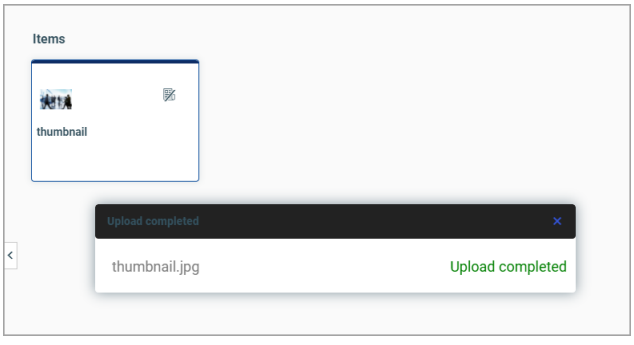
In addition to creating content using Db2 Web Query, you can upload other files, such as images and documents. These files can be used to enhance visualizations and shared with other users and groups.

Procedure: How to Upload Files From the + Content Menu

1. Select the workspace or folder where you want your uploaded file or files to reside.
2. Click the + *Content* button, point to *Other*, and then click *Upload File*.

   The Open dialog box opens.
3. Select one or multiple files from your machine and click *Open*.

The file uploads to your selected directory, and the *Upload completed* message appears, as shown in the following image.

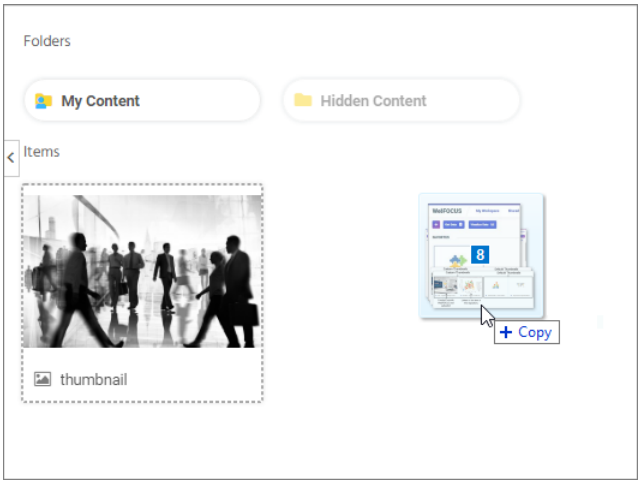


4. Close the *Upload completed* message and proceed with using the uploaded file.

   Note: When you upload an image, such as a .bmp, .jpg, .jpeg, .gif, or .png file, to the repository, an embedded thumbnail of the image automatically generates in the Db2 Web Query Explorer. To change the thumbnail that appears in the Db2 Web Query Explorer, right-click the thumbnail, and open the Properties panel. Click the *Advanced* tab, and modify the thumbnail.

Procedure: How to Upload Files by Dragging to the Explorer

1. In the Workspaces area, select the workspace or folder where you want your uploaded file or files to reside.
2. Drag one or multiple files from your machine directly to the explorer, as shown in the following image.



The file uploads to your selected directory and the *Upload completed* message shows the status of each uploaded file. If an upload fails, the error appears in red in the *Upload completed* message.

3. Close the *Upload completed* message and proceed with using the uploaded files.

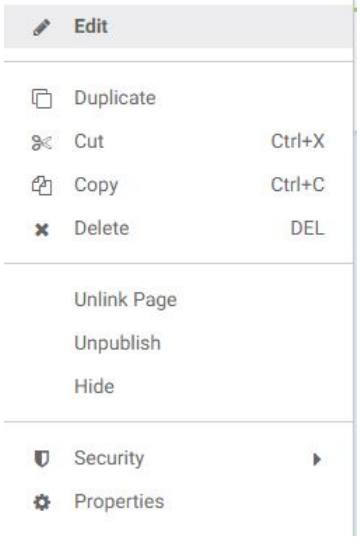
   Note: When you upload an image, such as a .bmp, .jpg, .jpeg, .gif, or .png file, to the repository, an embedded thumbnail of the image automatically generates in the Db2 Web Query Explorer. To change the thumbnail that appears in the Db2 Web Query Explorer, right-click the thumbnail, and open the Properties panel. Click the *Advanced* tab, and modify the thumbnail.

Using Keyboard Shortcuts

You can use keyboard shortcuts to perform the common actions shown in the following table.

Action	Shortcut Keys
Cut	Ctrl+X
Copy	Ctrl+C
Paste	Ctrl+V
Delete	DEL

The relevant shortcut keys display next to their corresponding options in the shortcut menu, as shown in the following images.



Note: You cannot paste items into multiple folders. If you attempt to do so, an error message displays, as shown in the following image.

Introducing the IBM Db2 Web Query Mobile App

The Db2 Web Query Mobile App is a simple, intuitive app that empowers users to perform reporting and analysis right from their mobile devices. The Db2 Web Query mobile app delivers rich, deep, highly interactive analytic functionality, fully exploiting the native device gestures that are already familiar to the user. With the Db2 Web Query app, you can manipulate data from a variety of sources in an almost unlimited number of ways in just a couple of taps. The app allows you to manage business dashboards and content, even when you are not connected to the Internet.

The Db2 Web Query mobile app is displayed in the following image.

With the Db2 Web Query mobile app, you can:

- Run reports, graphs, and dashboards online.
- Sort, filter, drill down, roll-up, calculate, and more, in both online and offline modes.

- Fully support native device characteristics, gestures, charting, menus, and controls within content.
- Open and catalog documents received as email attachments.

Configuring IBM Db2 Web Query Mobile App

To download Db2 Web Query mobile app on an iOS device, simply type *Db2 Web Query* in the search field in the App Store and choose the Db2 Web Query app.

On an Android™-based device, connect to the Google Play store, navigate to the Db2 Web Query mobile app, and tap *Install*.

Once the app is installed on your device, you can start configuring a connection to your Db2 Web Query environment.

Prerequisites to Using the Db2 Web Query Mobile App

To perform online analytics, you must connect to the Wifi network that your company uses or configure a VPN connection on a remote device.

Procedure: How to Configure a Connection in Db2 Web Query Mobile App

1. Tap the Db2 Web Query mobile app icon.

   The app opens and displays the Sites screen.

2. Tap the + icon to add a connection.

   The Add Site screen displays.

3. Populate the fields, as described below.

   HTTPS

   Specifies whether the server is on an HTTP or HTTPS site.

   Host name

   The Host name, or IP address, of the machine that is hosting the Db2 Web Query client.

   Host port

   The port number to the Db2 Web Query client.

   Context path

   The application context path. For example, /webquery.

Host title

The name of your Db2 Web Query client connection. The name can be anything you want it to be.

Note: The Host title only shows as a field when you configure the connection for the first time. If you edit an existing environment, the host title does not show as an option.

User name

The user name you use to log in to your Db2 Web Query client.

Password

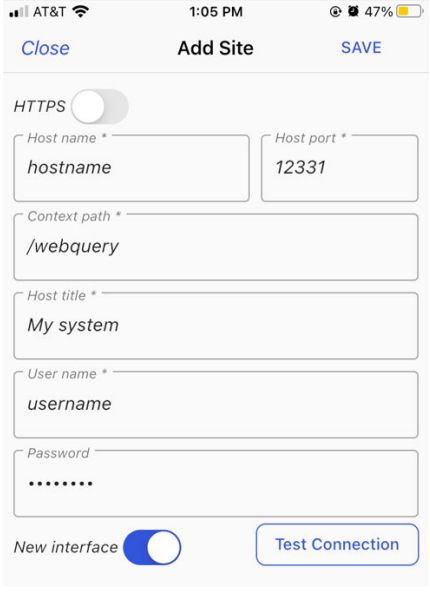
The password you use to log in to your Db2 Web Query client.

New interface

Enable this option to connect to the Db2 Web Query Home Page. The default value is Off.

4. Tap *Test Connection*.

If your configuration is correct, a message appears on the bottom of the screen confirming that the site settings are valid.



Note: If the connection is unsuccessful, you will see an error message identifying the field that causes an issue.

5. Tap *SAVE*.

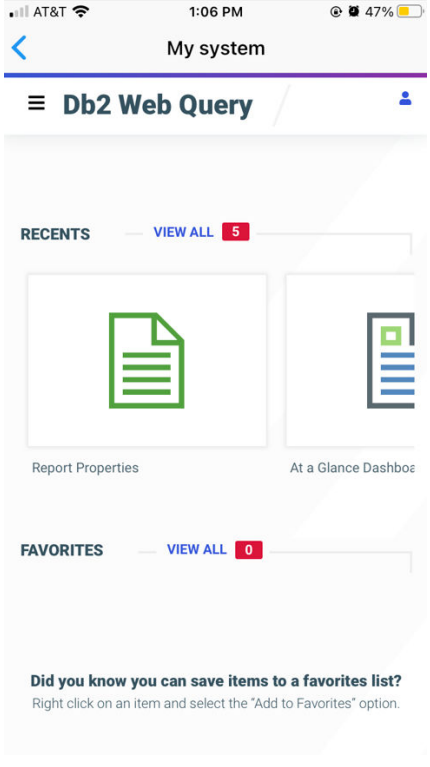
   The Sites screen displays, and the new connection is added.

6. Tap the newly configured connection.

   The Db2 Web Query Home Page loads.

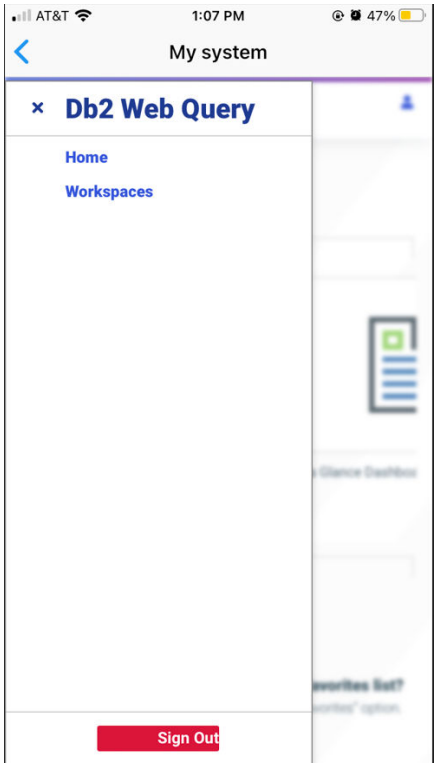
Navigating the Db2 Web Query Home Page on a Mobile App

The Home Page is the default landing page that opens when you first sign in to Db2 Web Query from the Db2 Web Query app, as shown in the following image.



The Home Page serves as a centralized place for viewing and sharing content, and performing searches. There are several interface and functionality changes that occur when you navigate the Home Page on the Db2 Web Query mobile app, allowing you to view the content saved in your environment.

When you view the Home Page on the Db2 Web Query app, the banner navigation is hidden from view to allow more space for your content. You can bring the banner navigation back by tapping the menu button ☰ on the navigation bar. The sidebar allows you to navigate between the Home and Workspaces views on the Home Page, as shown in the following image.



The banner menus are also hidden in the mobile app view. To access the functionality available from the banner menus, you need to use the full desktop version of the software. The Change Password and Sign Out options are available from the sidebar and also from the user menu in the upper right corner of your mobile display.

Note: Depending on the type and size of your device, your display might switch to the full version of Db2 Web Query in the landscape view.

You can run content in the Db2 Web Query app by double-tapping an item. Select shortcut menu options are also available from the app. To access the shortcut menu options, tap and hold the item. The shortcut menu options are context-sensitive, and vary, depending on the item or element you want to access.

To navigate between workspaces and folders inside the Db2 Web Query app, use the Resources tree or the breadcrumb trail in the Workspaces view. The arrows between the directories on the breadcrumb trail allow you to switch between different folders. Tap the ellipsis to navigate between the levels that are hidden from view.

You can also search, switch between list and grid views, refresh and sort content from the mobile app. These functions behave in the same way as they do in the full desktop view.

Using the Db2 Web Query Mobile App to View In-Document Analytics Reports

An In-Document Analytics report is an interactive report that is designed for offline analysis. It contains all the data and JavaScript® within the HTML output file. Packaging the data and the interactive functions in the HTML file also makes the output highly compressible for email and transparent to security systems.

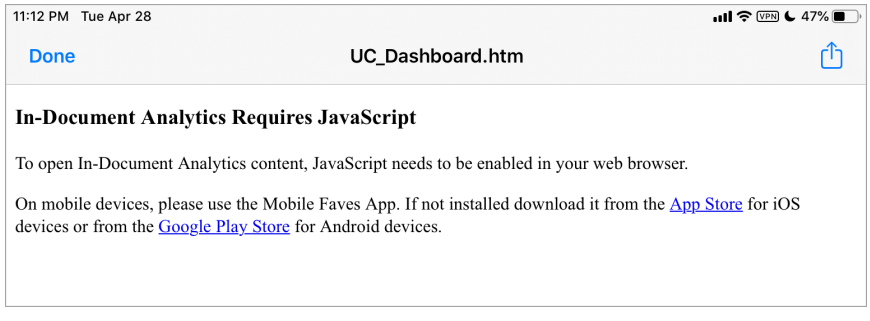
Viewing In-Document Analytics reports on mobile devices is only possible if JavaScript is enabled in the web browser. Some browsers may function differently depending on the operating system. Db2 Web Query mobile app makes it easy to view any In-Document Analytics report on any iOS or Android-based device.

Procedure: How to View an In-Document Analytics Report in the Db2 Web Query App

In this example, we download an In-Document Analytics report from an email attachment and open it in the Db2 Web Query mobile app.

1. In the mail app of your mobile device, open an email with the In-Document Analytics report attachment and then tap on the attached report to download it.

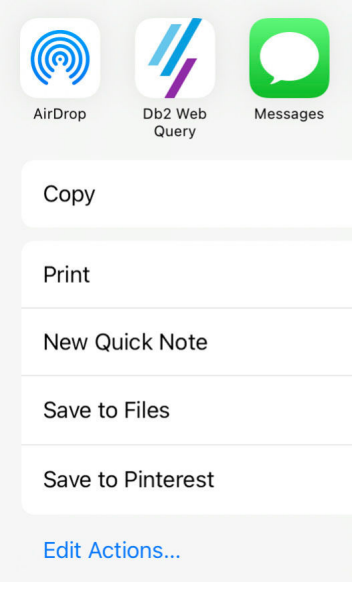
   The message displays informing you that JavaScript is needed for opening the report, as shown in the following image.



2. Tap the Share icon.

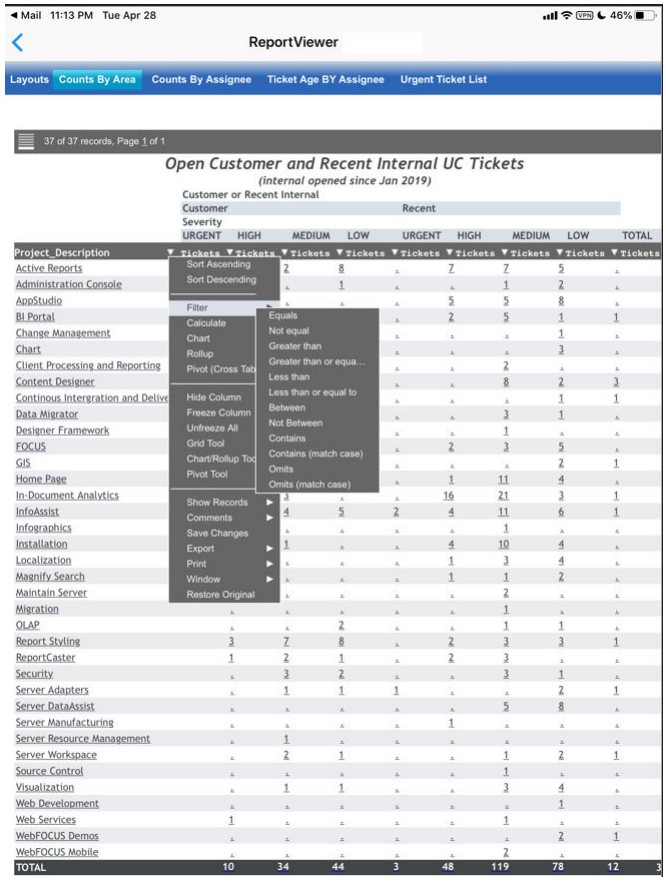
   The Share options that are enabled on your device display.

3. Tap *Db2 Web Query*, as shown in the following image.



Note: Depending on your device and its preferences, you may need to scroll and tap *More* to see the *Db2 Web Query* option.

The Db2 Web Query ReportViewer screen opens inside the Db2 Web Query mobile app, displaying the report. You can now work with the report, online and offline, and use its interactive features, as shown in the following image.



Using the Db2 Web Query Spreadsheet Client Add-in

The Spreadsheet Client is a Microsoft Office add-in that enables you to connect Excel directly to Db2 Web Query reporting tools, where you can access and analyze data. Connecting Excel to the Db2 Web Query reporting engine allows Spreadsheet Client to leverage all the adapters available to Db2 Web Query.

You can install the Spreadsheet Client Add-in on your desktop, where you can create and edit queries by accessing predefined data sources. Queries can be saved in an Excel document and refreshed at any time.

Because all Db2 Web Query report and connection information can be saved in an Excel workbook, users with the proper security and access rights can share spreadsheets throughout an organization. This functionality enables you to spend less time recreating reports and more time analyzing information for effective decision-making. It also enhances Excel data-privacy features and better addresses compliance concerns. When reports are built directly within Excel, you can lock all or some of the cells and password protect the worksheet. Locking cells can be useful to protect data and queries when sharing workbooks, but in Excel, locked cells cannot be refreshed or edited.

Spreadsheet Client Features

When using Spreadsheet Client from within the familiar Excel environment, you can utilize many powerful features including, but not limited to, the following:

- Build Excel applications with real-time information fed by Spreadsheet Client.
- Create dashboards and scorecards in Excel by combining multiple data sources in a single worksheet.
- Ensure data integrity in your spreadsheets by using named ranges and formulas that are automatically generated and updated with Spreadsheet Client.
- Create queries from scratch using the simple, yet powerful ad hoc reporting capabilities of Db2 Web Query.
- Use your own custom guided ad hoc forms to populate the workbook.
- Output computations and totals as native Excel formulas.
- Style output, add data filtering, and include drill-downs.
- Supports 64-bit version of Excel 2016 and 2010.
- Supports 32-bit version of Excel 2003, 2007, and 2010.

Configuring Spreadsheet Client

The Db2 Web Query Administration Console is used to configure the Spreadsheet Client. By default, the Spreadsheet Client is configured to use Db2 Web Query Managed Reporting Security. This leverages the security defined in Db2 Web Query and provides secure access to all data available through the Db2 Web Query environment. Additional optional settings in the Console can be configured to provide you with the ability to create queries by accessing SAFs (Structured Ad hoc Forms) stored in the Managed Reporting repository. A SAF is an HTML form containing a report procedure that is already connected to a data source, which enables you to select from a series of parameters to build a data set for analysis in Excel.

Note: Run-time enablement users are not permitted to use InfoAssist+ and must use SAFs.

Spreadsheet Client has been enhanced when using Managed Reporting security to ensure that users are presented with a list of Master Files based on the application path set in the properties of a repository folder. This ensures that Managed Reporting Security is properly utilized and users only have access to metadata for which they are authorized.

Procedure: How to Configure Spreadsheet Client

1. Sign in to Db2 Web Query using a Web Query Administrator user ID, and launch the Administration Console.
2. Click *Configuration* in the navigation pane, then click *Spreadsheet Client*.

   The Db2 Web Query Spreadsheet Client panel appears with the *Security* setting set to Managed Reporting, by default, as shown in the following image. Do not change this setting.

3. The *Form_Only* parameter is not selected, by default. If you select the check box, users can access only the available Structured Ad Hoc Forms (SAFs). Users will not be able to use InfoAssist+ to create a report.
4. Click *Save* to save your configuration settings. Click *Clear Cache* on the main toolbar to clear the site collection cache for the web application.

Configuring a Default Db2 Web Query Environment

A configuration file is provided with the Spreadsheet Client Add-In as a template for the administrator to design a default Db2 Web Query environment. The configuration file defines such items as the Db2 Web Query Web server port number, alias, and client path. These items provide the user with a default Db2 Web Query environment allowing them to bypass the additional step of manually defining these parameters in order to use Spreadsheet Client.

The configuration file is named wqsclient.cfg and is located in

```
/QIBM/ProdData/QWEBQRY/base80/utilities/quickdata
```

The configuration file can contain multiple Db2 Web Query configurations. Keep in mind that if the configuration file contains more than one Db2 Web Query configuration, then the last one appearing in the file is the configuration that is used when opening Spreadsheet Client.

The configuration file provided as a template with the Spreadsheet Client Add-in contains examples of configurations and instructions to help you create your own configuration. The following is an example of a Db2 Web Query configuration in the configuration file:

```
SERVER_START
     PROTOCOL="http"
     HOST="wq_hostname"
     PORT="12331"
     HTML_ALIAS="/webquery_html"
     CLIENT_PATH="/webquery/WFServlet"
SERVER_END
```

Use the following guidelines and rules to create the configuration file:

- The configuration file must have the same name as the Spreadsheet Add-In file and the extension .cfg (for example, wqsclient.cfg).
- The configuration file must reside on the machine running the Spreadsheet Client in the same directory as the .xla file.
- Each Db2 Web Query configuration must be contained by the delimiters, SERVER_START and SERVER_END.
- Each configuration must contain the following parameters in order to connect to Db2 Web Query:
  - **PROTOCOL.** The protocol used in the environment running Db2 Web Query. If Db2 Web Query is running in an SSL environment, you must specify https as the protocol value. The default value is http.
  - **HOST.** The server name where the Db2 Web Query Web application is installed.
  - **PORT.** The port number of the application server where Db2 Web Query is installed. The default port is 12331. This should not be changed.
  - **HTML_ALIAS.** The Web server or application server alias where the Db2 Web Query static pages are located. The default value is /webquery_html and should not be changed. The leading slash is required.
  - **CLIENT_PATH.** The path to the Db2 Web Query Servlet, as defined in the Db2 Web Query Web application file, web.xml. This value is /webquery/WFServlet and should not be changed. The leading slash is required.
  - Using double quotation marks (" ") around parameter values, as shown in our example, is optional.
  - Begin a comment line in the file with a number sign (#).

Installing and Setting Up the Spreadsheet Client

The Db2 Web Query Spreadsheet Client requires:

- Db2 Web Query Version 2.1.x or higher.
- Excel 2003 or higher.

Procedure: How to Distribute the Web Query Spreadsheet Client Add-in File

1. Copy the wqsclient.xla add-in file and wqsclient.cfg configuration file, located in the following directory:

   ```
   /QIBM/ProdData/QWEBQRY/base80/utilities/quickdata
   ```

2. Add the two files to the following directory on the machines that use the Web Query Spreadsheet Client:

   drive:\Users*userid*\AppData\Roaming\Microsoft\AddIns\

   where:

   userid

   Is the user name used to sign in to the PC.

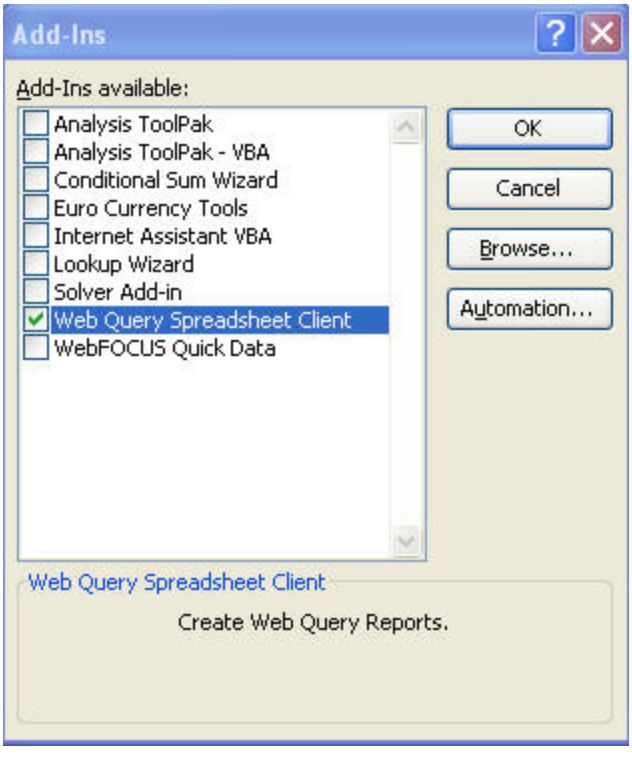
   After the Spreadsheet Client Add-in is in the proper directory location, you must open Excel and select the Db2 Web Query Spreadsheet Client option in the Add-Ins dialog box.

Procedure: How to Enable the Web Query Spreadsheet Client in Excel 2003

Use the following steps to enable the Web Query Spreadsheet Client in Excel 2003.

1. Launch Microsoft Excel.
2. Click *Tools*, and then select *Add-Ins*.

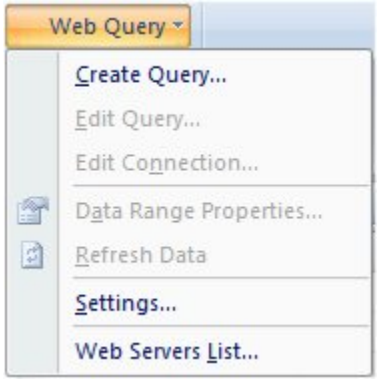
The Add-Ins dialog box appears with Db2 Web Query Spreadsheet Client listed as a selectable add-in option, as shown in the following image.



Note: If Db2 Web Query Spreadsheet Client is not listed in the Add-Ins dialog box, check that the add-in is in the correct directory.

3. Select *Web Query Spreadsheet Client* and click *OK*.
4. Close and open Microsoft Excel.

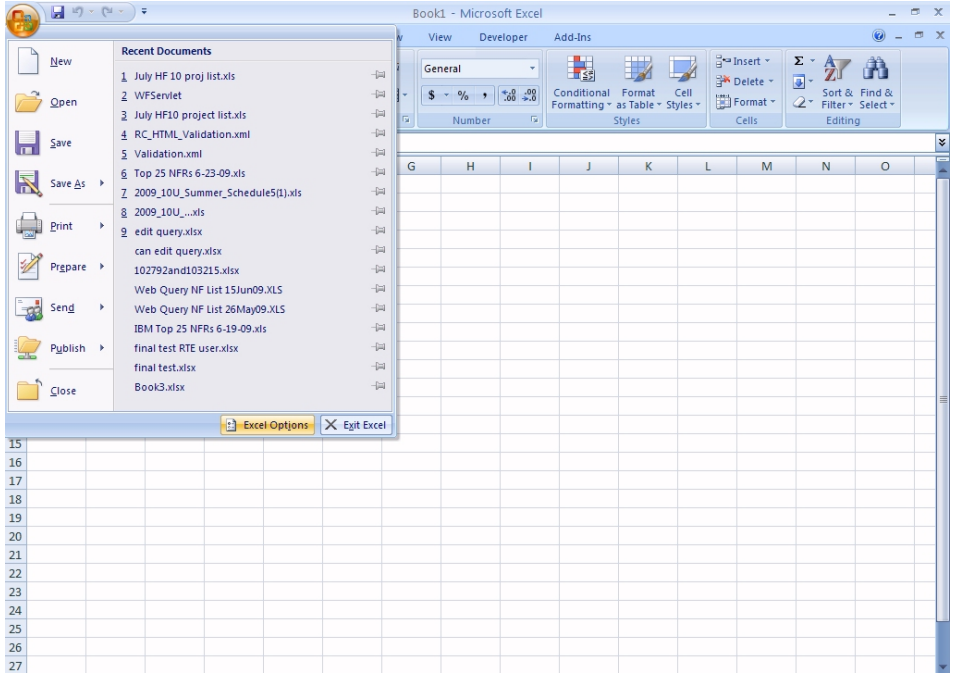
A new menu, labeled Web Query, is enabled in Excel, as shown in the following image.



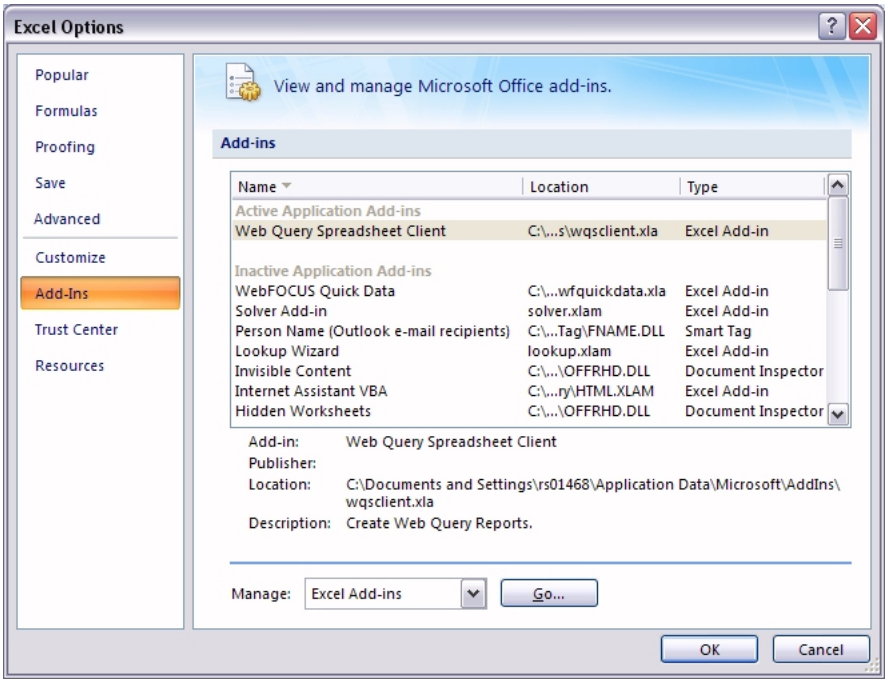
Procedure: How to Enable the Web Query Spreadsheet Client for Excel 2007

Use the following steps to enable the Web Query Spreadsheet Client in Excel 2007.

1. Launch Microsoft Excel.
2. Click the *Office* button.
3. Select *Excel Options*, as shown in the following image.



4. Click the *Add-Ins* option.
5. Click the *Go* button to the right of the Excel Add-in drop-down mwnu, as shown in the following image.



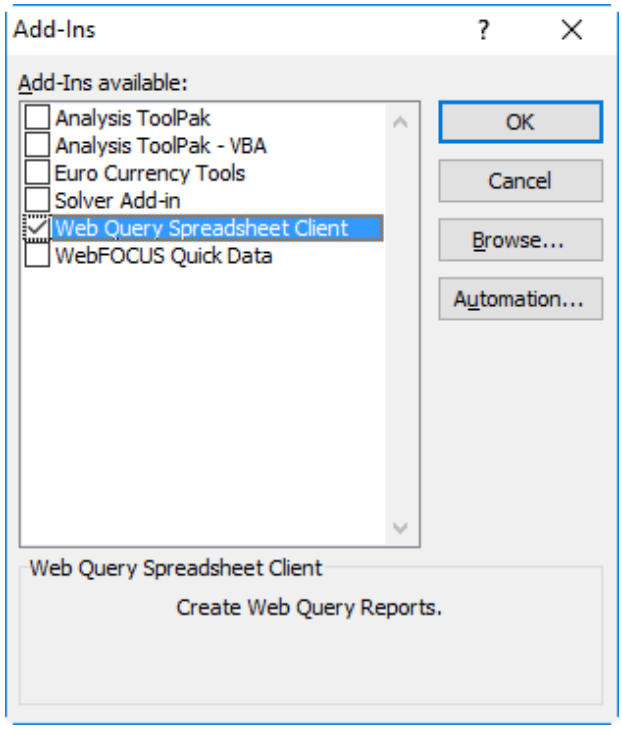
   The Add-Ins dialog box appears.
6. Select *Web Query Spreadsheet Client* and click *OK*.

Procedure: How to Enable the Web Query Spreadsheet Client in Excel 2010 and Higher

Use the following steps to enable the Web Query Spreadsheet Client in Excel 2010 and higher.

1. Launch Microsoft Excel.
2. Click the *File* tab, click *Options*, and then click *Open*.
3. In the Excel Options dialog box, click *Add-Ins*.
4. In the Manage dialog box, click *Excel Add-ins*, and then click *Go*.

The Add-Ins dialog box opens, with Web Query Spreadsheet Client as an add-in option, as shown in the following image.



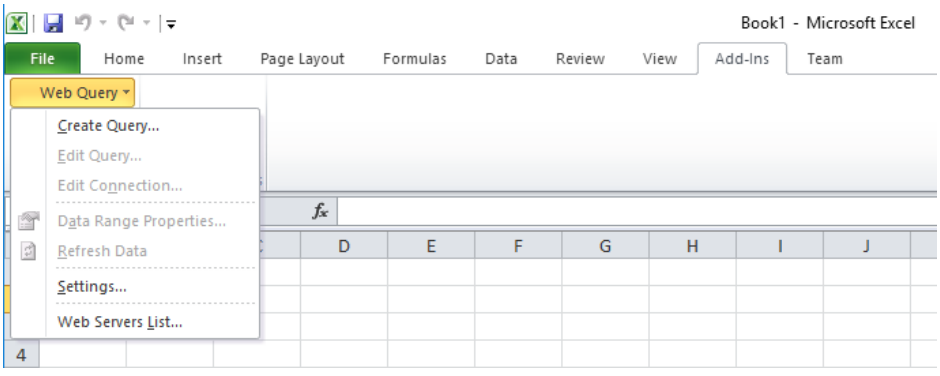
Note:

- If Web Query Spreadsheet Client is not listed in the Add-Ins dialog box, ensure that the add-in file is installed and placed in the correct directory.
- If the Web Query Spreadsheet Client add-in was installed in a different directory, use the *Browse* button in the Add-Ins dialog box to locate it.

5. Select the *Web Query Spreadsheet Client* check box and click *OK*.

   The Add-Ins dialog box closes, and the Add-Ins tab appears on the ribbon.

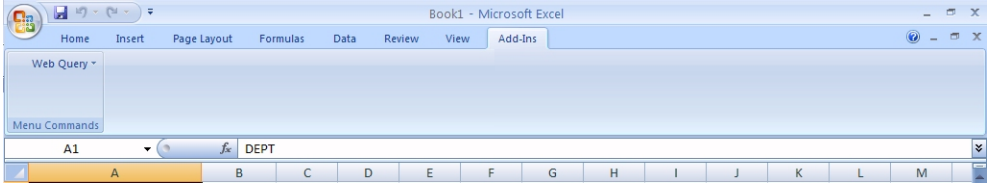
6. Click the *Add-Ins* tab to view the new Web Query menu, as shown in the following image.



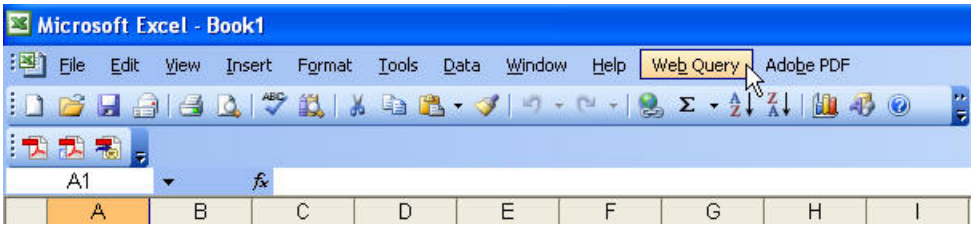
Accessing Spreadsheet Client

After installation, Spreadsheet Client is available in Excel from the main tool bar.

In Excel 2007, the Add-ins tab is displayed on the main tool bar and contains all add-in menu items, including the Web Query add-in, as shown in the following image.



In Excel 2003, the main tool bar contains the Web Query add-in as a new menu item, as shown in the following image.

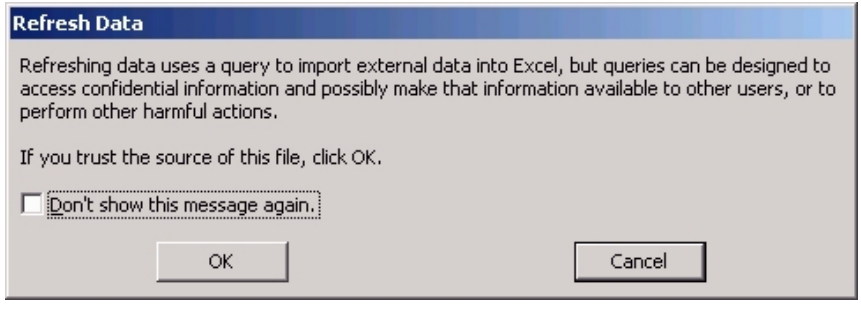


From Excel, click *Web Query* to view a drop-down menu with all of the necessary options for working with queries. The following options, except for Settings, are also available from Excel right-click context menus in cells containing any part of a query.

- **Create Query.** Available for new queries only, this option opens the Web Server Connection dialog box so you can connect to a Reporting Server. It continues by opening the Data Source Selection dialog box so you can select a Master File, and then opens InfoAssist+ where you can create the query.
- **Edit Query.** Available for existing queries only, this option opens InfoAssist+ where you can edit the query.

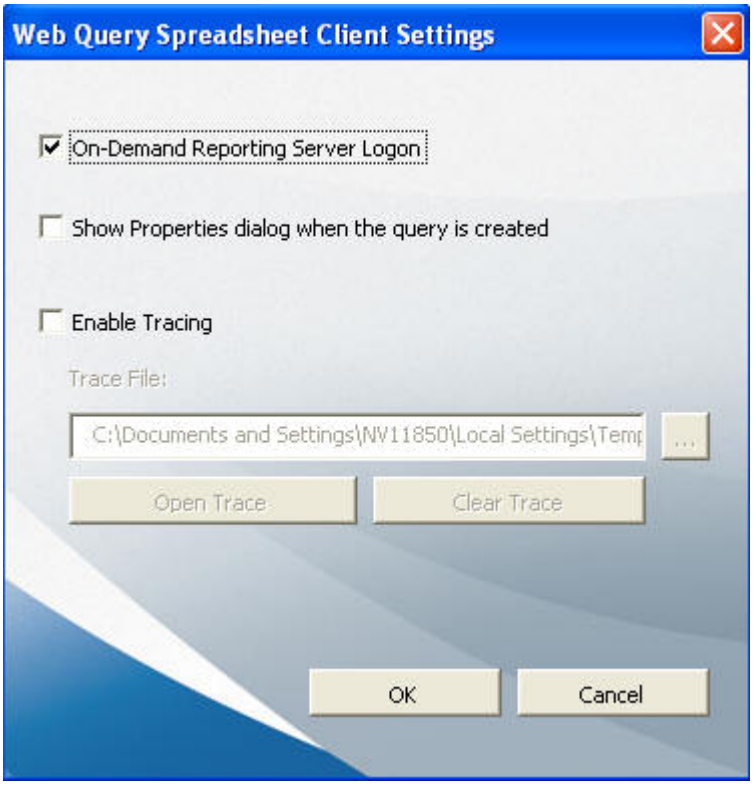
  Note: Edit Query is not enabled for password protected cells.
- **Edit Connection.** Available for existing queries only, this option opens the Web Server Connection dialog box, where you can edit the connection settings, including the Web Server URL, the HTML Alias, the Client Path, and the Reporting Server. The ability to edit connection information saves time when reusing reports and helps facilitate the sharing of workbooks across an organization.
- **Data Range Properties.** Available for existing queries only, this option opens the External Data Range Properties dialog box, where you can set Excel query properties. For more information, see *Setting Query Properties* on page 80.
- **Refresh Data.** Available for existing queries only, this option opens the Refresh Data dialog box where you can update the data in the report query.

  The Refresh Data dialog box provides a security warning, as shown in the following image.



  Note: Refresh is not enabled for password protected cells.

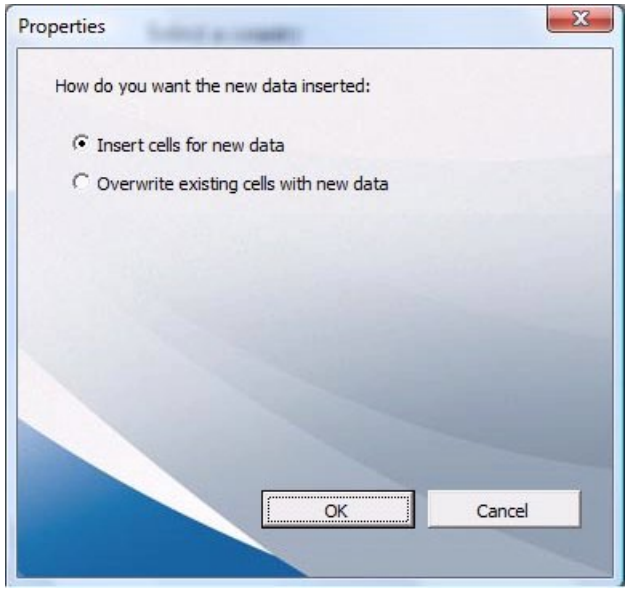
- **Settings.** This option opens the Web Query Spreadsheet Client Settings dialog box, as shown in the following image.



The Web Query Spreadsheet Client Settings window provides the following settings:

- **On-Demand Reporting Server Logon.** This setting determines if the user will be prompted to sign in to Db2 Web Query the first time a connection to the server is made during an Excel session (check this setting), or each time a request is made to Db2 Web Query during an Excel session (do not check this setting), for example, during a refresh or Edit Query operation.

- **Show Properties dialog when the query is created.** When this setting is selected, a dialog box with options on how to insert data into Excel opens each time a new query is executed. The following image shows this Properties dialog box.



The options to control how the results from the query will be inserted into the Excel worksheet are:

- **Insert cells for new data.** This option allows you to retain results from multiple queries in the same Excel worksheet. Depending on where new data will be inserted, data from an earlier request may shift.
- **Overwrite existing cells with new data.** This option will overwrite existing data to place results with those from the new request.

Once a query is generated, users can also control how data from new reports will be displayed in the Excel worksheet by right-clicking on a cell from an existing query and selecting *Data Range Properties*. For more information on this dialog box, see *Setting Query Properties* on page 80.

- **Enable Tracing.** This option allows you to capture Db2 Web Query Spreadsheet Client information in a trace file to troubleshoot communication problems and issues that occur when attempting to create and run report requests.

The captured information includes tasks performed by the tool when it attempts to connect to the Web Server and Reporting Server, when requests are made for data, and when data is retrieved. The default name of the trace file is wqsclient.txt and it is created in the same directory as the Db2 Web Query Spreadsheet Client add-in file, for example:

`C:\Users\`*`userid`*`\AppData\Roaming\Microsoft\Addins\`

Note: Traces are captured for the duration of a single active Excel session. Tracing is automatically turned off when you close an Excel session. The trace file content is cumulative, adding trace information from each session where tracing is enabled.

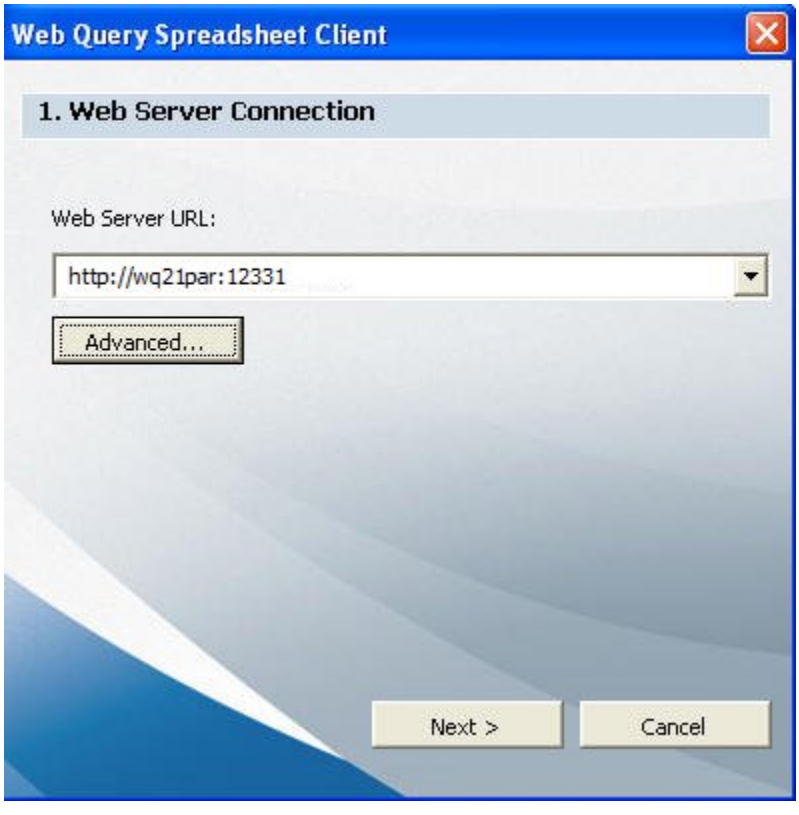
When you select *Enable Trace*, the Trace File field is automatically populated with the full path to the trace file. The path includes the trace file name. You can change the location and name of the trace file by either typing the changes in this field or by clicking the ellipsis and browsing to a new trace file location.

To view the current trace file, click *Open Trace*.

To delete the contents of the current trace file, click *Clear Trace*.

Defining Web Server Connection Settings

Building, running, and accessing a query requires an HTTP connection to a Db2 Web Query reporting environment. The Web Server Connection dialog box opens when a new query is created, as shown in the following image.



The Spreadsheet Client configuration file, wqsclient.cfg, should have been updated by your administrator to include the correct Web Server URL for your environment. For more information, see *Configuring a Default Db2 Web Query Environment* on page 49. A newly created query will use this connection, by default.

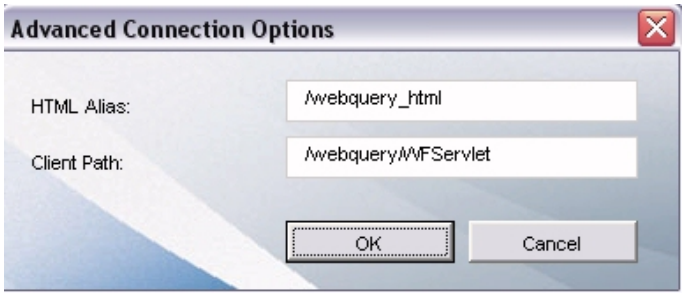
Reference: Web Server Connection Usage Notes for Queries

For query data connections, the following are supported:

- Anonymous Web Servers.
- HTTP and HTTPS.

Advanced Connection Options Dialog Box

To access the Advanced Connection Options dialog box, click the *Advanced* button in the Web Server Connection dialog box. The Spreadsheet Client configuration file contains the proper settings for your Db2 Web Query environment. Do not change these settings. The Advanced Connection Options dialog box is shown in the following image.

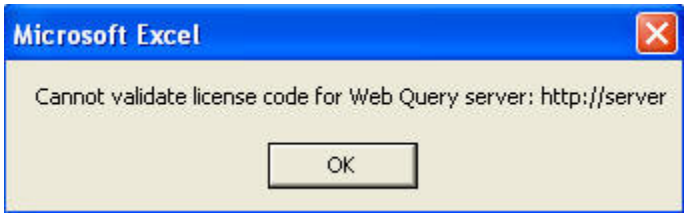


- **HTML Alias.** Defines the alias to the Web Server where the webquery_html directory is located.
- **Client Path.** Specifies how calls are made to the Web Server. Your Db2 Web Query environment uses the Web Query Servlet with the webquery context path, which results in the client path being set to /webquery/WFServlet, by default.

Logging into Db2 Web Query

Spreadsheet Client is configured to use Db2 Web Query Authentication. You are prompted to sign in with valid Db2 Web Query Managed Reporting credentials, as shown in the following image.

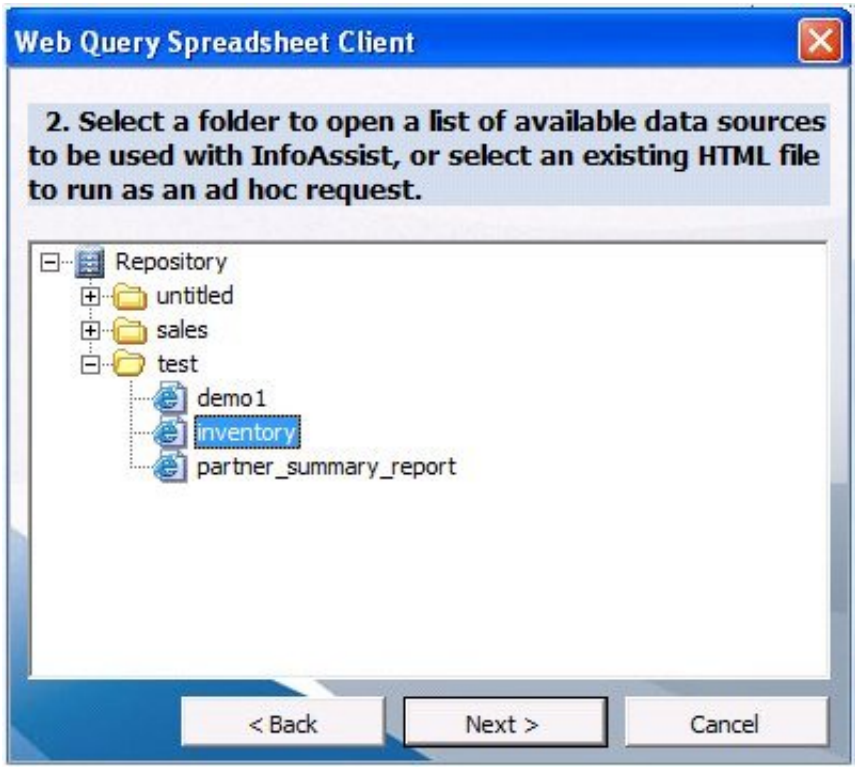
If your environment is not properly licensed, an error message appears.



After a successful sign in, you will be prompted to perform one of two options:

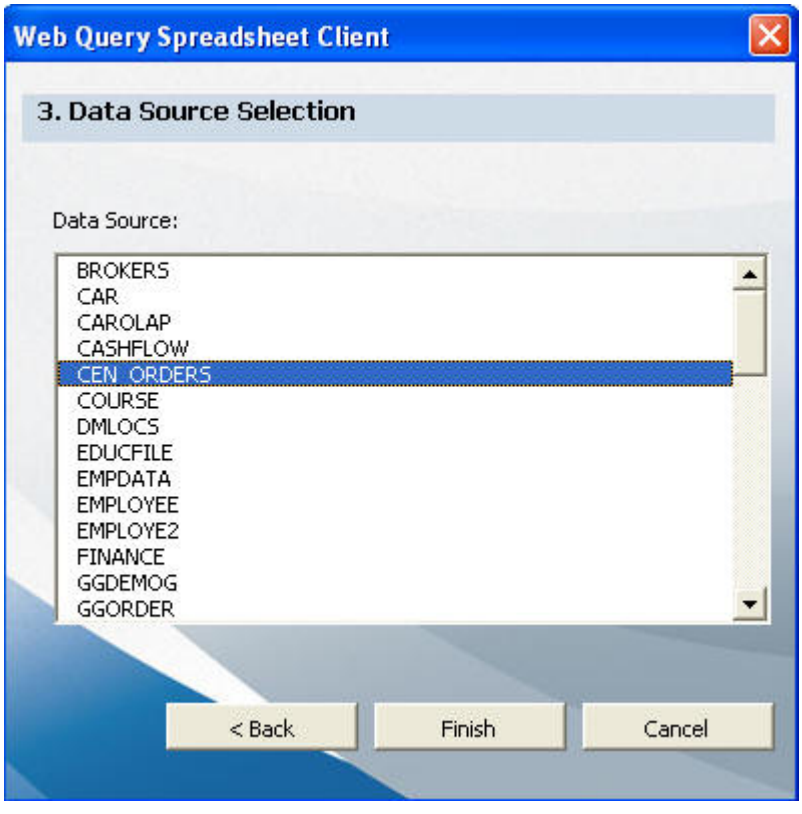
- Select a folder to determine which Master Files (synonyms) may be used to create a query with InfoAssist+. The InfoAssist+ query will then be used to populate your Excel worksheet.
- Select an existing HTML file (SAF) that will be run to populate your Excel worksheet.

Folders and HTML files will be listed based on user privileges, as shown in the following image.



Selecting a Master File

After you select a folder from the Web Query repository, you are presented with a corresponding list of Master Files (synonyms), as shown in the following image.



Scroll through the Data Source list and select the desired Master File. When you click *Finish*, the associated data fields are loaded into InfoAssist.

Note: The only time you can select a Master File is when you are creating a new query. The Data Source Selection dialog box is not available for you to change Master Files when editing an existing query.

Creating Report Queries With InfoAssist

You can create a new report query directly from Excel by accessing the Spreadsheet Client Add-in. Multiple queries can be placed within the same worksheet or spread out over multiple worksheets within a workbook.

Note that there are limitations with queries that overlap. However, there are data layout options available in the Query properties of Excel that can assist with overlapping queries. This behavior is governed by Excel, not Spreadsheet Client.

Procedure: How to Create a New Report Query in InfoAssist

1. Open an Excel file.
2. Select a cell in which to place the query.
3. Click the *Web Query* option in the Excel menu, then select *Create Query*.

   You can also right-click any cell and select *Create Web Query Report*.
4. Specify the desired Web Server URL when the Web Server Connection dialog box opens.

   When the desired connection settings have been specified, click *Next*.

   You are prompted to sign in with valid Db2 Web Query credentials unless you are already signed in and have the on-demand Reporting Server Logon option checked under Web Query settings.
5. Select a folder to determine which Master Files (synonyms) may be used to create a query with InfoAssist.
6. In the Data Source Selection dialog box, select the desired Master File and click *Finish*. For more information, see *Selecting a Master File* on page 64.

   You are presented with InfoAssist, where you can build a query and run it to return the output data to Excel.

Example: Creating a New Report Query in InfoAssist

This example covers multiple aspects of creating a new report query using Spreadsheet Client from within an Excel file.

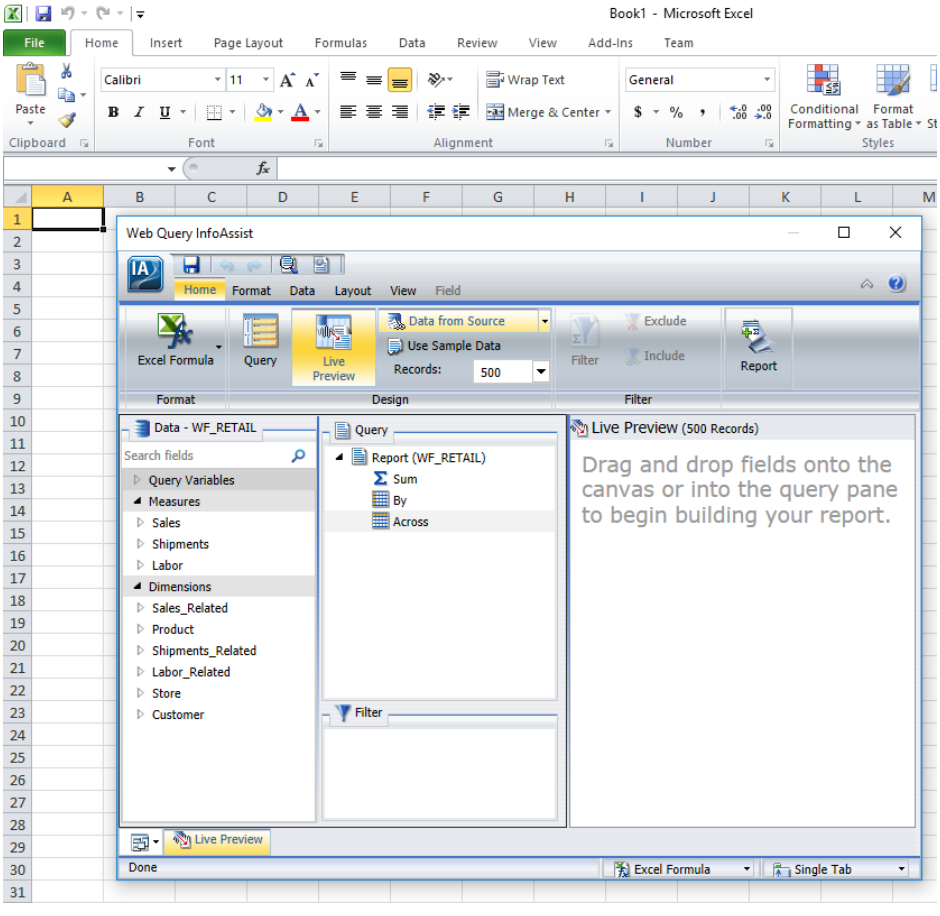
1. Open an Excel file, click the *Web Query* option in the Excel menu, then select *Create Query*.
2. Specify http://*hostname*:12331 in the Web Server URL field in the Web Server Connection dialog box that opens, then click *Next*.

   Note: Specify any Web Server URL that works in your reporting environment.
3. Select a folder to determine which Master Files (synonyms) may be used to create a query with InfoAssist.
4. In the Data Source Selection dialog box that opens, select *CEN_ORDERS* from the Data Source list, then click *Finish*.

   InfoAssist opens.
5. In Interactive Design View, select *By* under Query on the left pane, and double-click *Product Category* from the Data list.

6. Select *Sum* under Query on the left pane, and double-click *Cost* and *Revenue* from the Data list.
7. On the Home tab, click the *Report* icon, and select *Column Totals*.

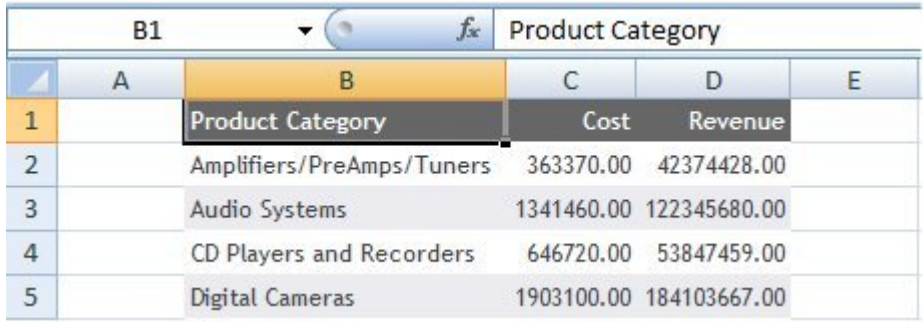
   After you perform the steps up to this point, the InfoAssist window looks similar to the following.



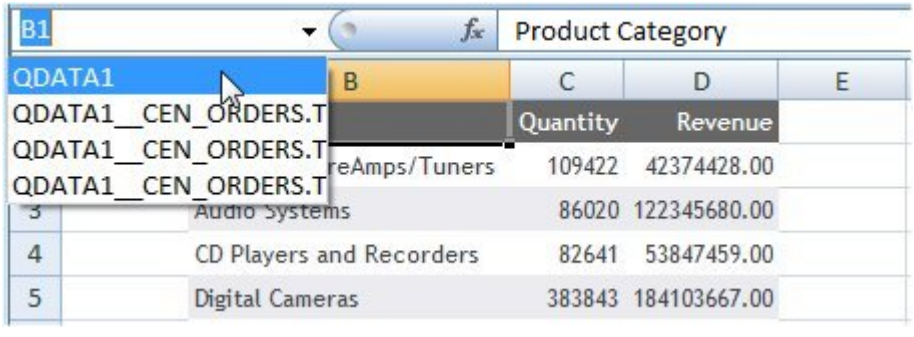
8. Click the *Save* button.

   If you selected the *Show Properties dialog when the query is created* option in the Db2 Web Query Spreadsheet Client dialog box, the Properties dialog box opens. It allows you to choose to insert the new data into the Excel worksheet, or to replace the existing data with the new data. For details, see *Installing and Setting Up the Spreadsheet Client* on page 51.
9. If you see the Properties dialog box, select *Insert cells for new data*, and click *OK*.

The report query data is returned to the Excel file, as shown in the following image.



10. Click the drop-down arrow to the right of the Name Box. You will see named ranges that are automatically added to the query, as shown in the following image.



Named ranges are added to the entire data table. The named range for the entire data table is QDATA1.

11. Select *QDATA1* from the Name Box. The data in the table is automatically highlighted.
12. Save the Excel file so that it can be reused in the example on editing an existing report query.

Editing Report Queries in InfoAssist

You can edit an existing query previously created with Db2 Web Query Spreadsheet Client in an Excel file. The Edit Query option automatically launches InfoAssist using the same connection attributes and data source selected when the query was first created or last saved.

If you want to edit the connection attributes, prior to editing the query, right-click any cell in the existing query, and select *Edit Connection* to open the Web Server Connection dialog box.

Note:

- You cannot select a new Master File when editing an existing query.
- You cannot edit password-protected cells.

Procedure: How to Edit an Existing Report Query in InfoAssist

1. Open the desired Excel file that contains the existing query.
2. Move the cursor over any cell in the existing query data, and select the *Edit Query* option from the Excel right-click context menu.

   If there is only one query in the Excel file, you can also use the Db2 Web Query menu in the main toolbar to select the *Edit Query* option.

   Selecting *Edit Query* launches InfoAssist, where you can edit the existing query.

Any cell that contains data from the query is a part of that query, so that you can click anywhere within that range of data to edit the query.

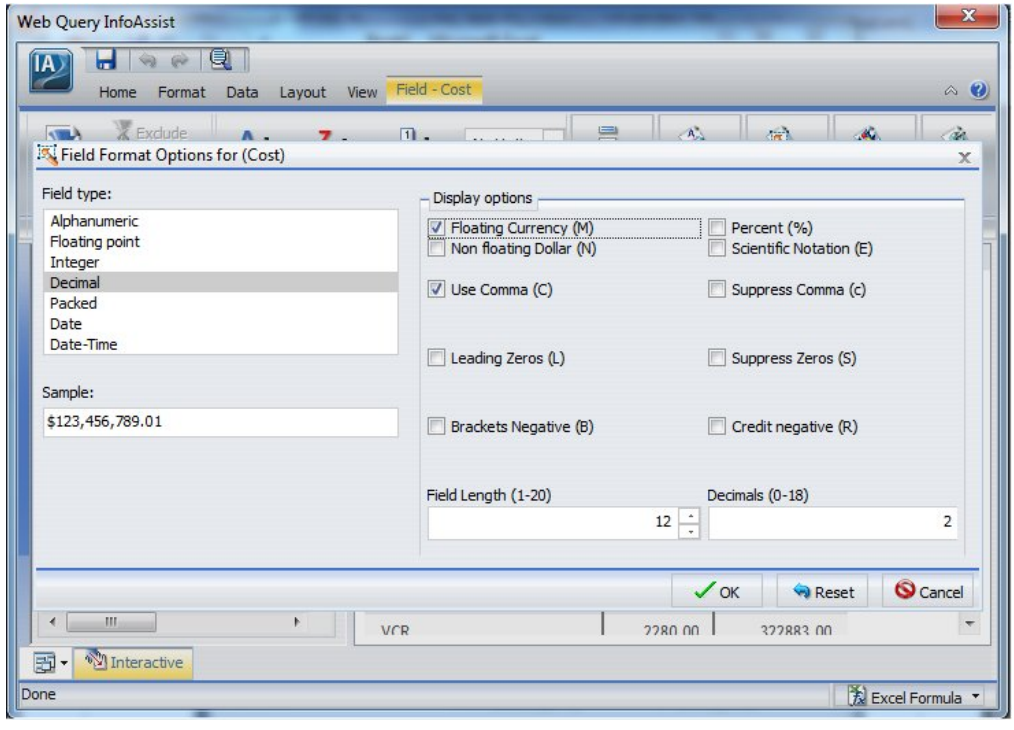
Example: Editing an Existing Report Query in InfoAssist

This example covers multiple aspects of editing an existing report query using the Db2 Web Query Spreadsheet Client tool from an Excel file.

1. Open the existing Excel file created in the previous example in *How to Create a New Report Query in InfoAssist* on page 65.
2. Right-click any cell in the data area of the existing report query, and select *Edit Query*.

   InfoAssist opens, displaying the query.
3. To change the format of the Cost measure, right-click *Cost* under Sum in the Query list, and click *Edit Format* to open the Field Format Options dialog box.
4. Set the Field type to *Decimal*, leave the Field Length set to the default value of *12*, set the number of Decimals to *2*, and select *Floating Currency (M)* and *Use Comma (C)* from the Display options list.

The Field Format Options dialog box will look similar to the following.



5. Click *OK*.
6. Perform the same three previous steps to change the format of the Revenue measure to match the settings applied to the Revenue measure.
7. Right-click *Product Category* under By in the Query list, and click *Delete* to delete this field.
8. Double-click *Product Type* in the Data list, making it a By field to replace the Product Category field that you deleted in the previous step.
9. Click the *Save* button.

The report query data is returned to the Excel file, as shown in the following image.

B1 | Product Type

	A	B	C	D
1		Product Type	Cost	Revenue
2		Audio	$3,448,330.00	$382,683,321.00
3		Camcorders	$4,858,920.00	$444,531,041.00
4		Cameras	$1,903,100.00	$184,103,667.00
5		Office	$214,865.00	$30,245,685.00
6		Video	$6,088,300.00	$520,360,205.00
7		TOTAL	$16,513,515.00	$1,561,923,919.00

Tip: You may need to widen the Cost and Revenue columns to correctly display the TOTAL value.

10. Since you can do formatting in Db2 Web Query and Excel, you need to make sure that the Excel formatting is preserved when you edit a query and return the data to Excel.

    To preserve any formatting applied in Excel, right-click any cell in the data area of the query, and select *Data Range Properties*.

    The External Data Range Properties dialog box opens.

11. Select the *Preserve cell formatting* check box in the Data formatting and layout area of the dialog box, and click *OK*.

12. To demonstrate the value of having named ranges, add a formula that counts the number of values in a named range.

    Click any cell to the right of the existing query data, click the down arrow to the right of the AutoSum (formula) button on the Excel toolbar, select *Count Numbers*, and replace the range of cells in the function text box with the named range for the Cost column, which is QDATA1__CEN_ORDERS.T2_INVENTORY.COST. This cell now contains =COUNT(QDATA1__CEN_ORDERS.T2_INVENTORY.COST), and press the Enter key.

Because there are 5 values in the Cost column, the cell displays 5, as shown in the following image of the worksheet.

F2 =COUNT(QDATA1__CEN_ORDERS.T2_INVENTORY.COST)

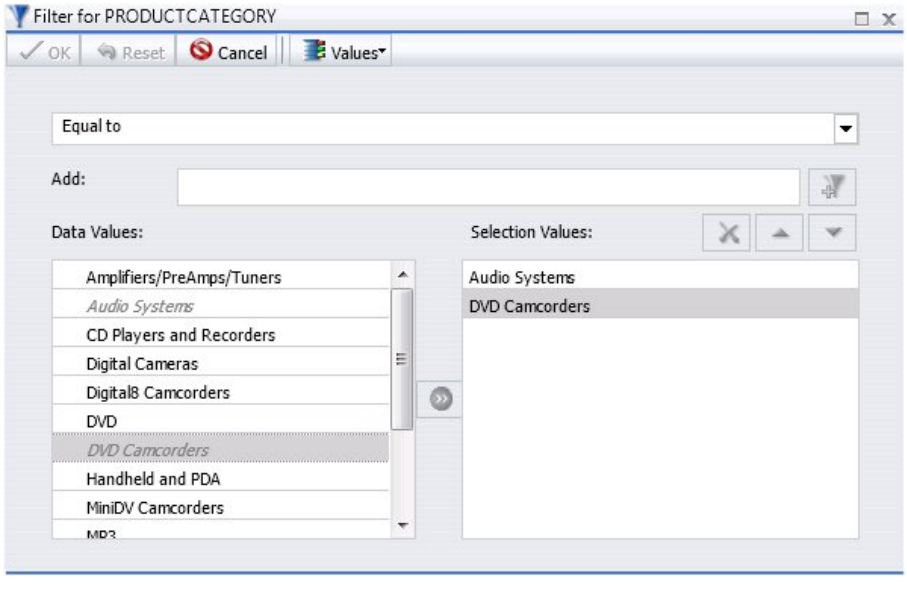
	A	B	C	D	E	F
1		Product Type	Cost	Revenue		
2		Audio	$3,448,330.00	$382,683,321.00		5
3		Camcorders	$4,858,920.00	$444,531,041.00		
4		Cameras	$1,903,100.00	$184,103,667.00		
5		Office	$214,865.00	$30,245,685.00		
6		Video	$6,088,300.00	$520,360,205.00		
7		TOTAL	$16,513,515.00	$1,561,923,919.00		

Notice the COUNT formula displayed in the function text box above the query data.

13. To edit the query again, right-click any cell in the query data, and select *Edit Query*. InfoAssist opens, displaying the query.

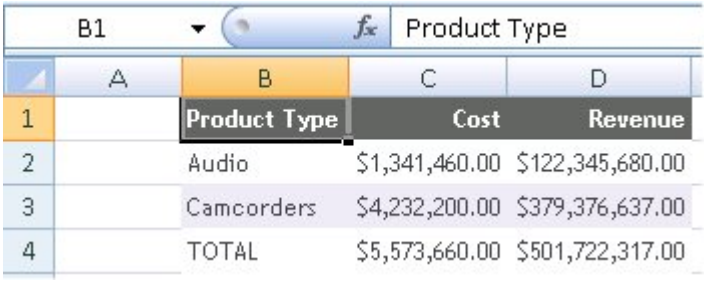
14. To add a filter, select *Product Category* from the Data list on the left pane, and click the *Filter* icon on the Home tab. In the Filter for PRODUCTCATEGORY dialog box, click the *Values* button, and select *Fetch All Values from Source*. Move *Audio Systems* and *DVD Camcorders* from the Data Values list to the Selection Values list, and click *OK*.

    The filter is shown in the following image.



15.Click the *Save* button.

The filtered data is returned to the Excel file, as shown in the following image.



16.Save the Excel file.

Creating Report Queries From Structured Ad hoc Forms

You can create a new report query directly from Excel by accessing existing SAFs (Structured Ad hoc Forms). A SAF is an HTML form containing a report procedure that is already connected to a data source, which enables you to select from a series of parameters to create output that is added to the active worksheet in Excel. You can analyze the output data in Excel and rerun the query to refresh the data as needed.

Note: SAFs are created in the Developer Workbench HTML Canvas, which references an existing parameterized report.

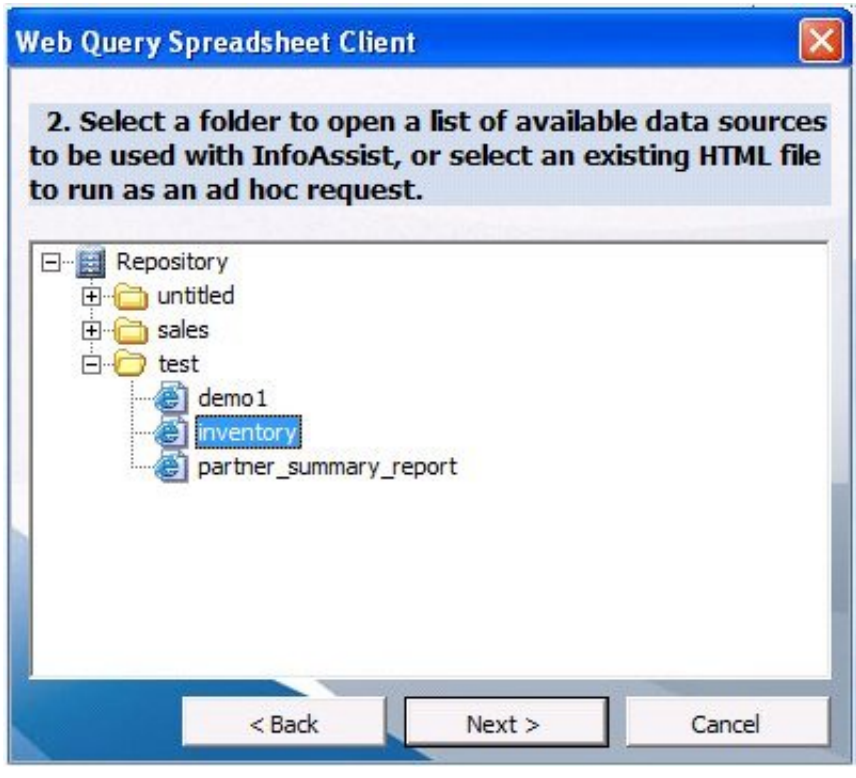
Procedure: How to Create a Report Query From a Structured Ad hoc Form

1. Open an Excel file.
2. Select a cell in which to place the query.
3. Click the *Web Query* option in the Excel menu, then select *Create Query*.

   You can also right-click any cell and select *Create Web Query Query*.
4. If connection information was not specified during the creation of a previous query, you must specify the desired Reporting Server URL when the Web Server Connection dialog box opens. When the desired connection settings have been specified, click *Next*. For more information, see *Defining Web Server Connection Settings* on page 61.

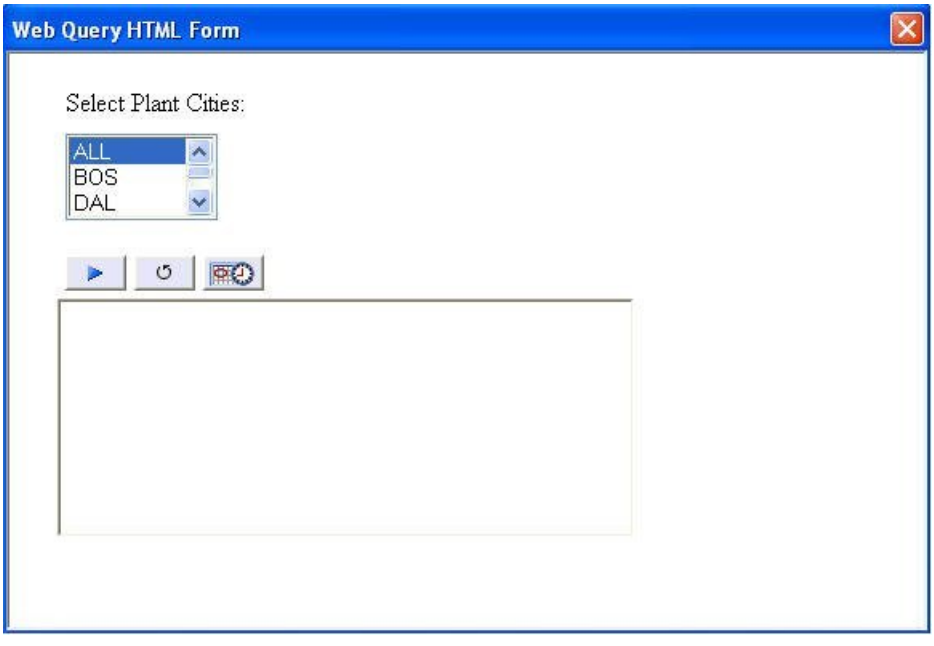
   Spreadsheet Client is configured to use Managed Reporting Authentication, so you are prompted to sign in with valid Db2 Web Query credentials (unless you are already signed in).

Structured ad hoc forms can now reside in any folder. Folders and HTML files will be listed based on user privileges, as shown in the following image.



5. Navigate to the folder, select an HTML file (SAF), and click *Next*.

6. Select a parameter in the Web Query HTML Form dialog box that appears, as shown in the following image. Next, click the *Run* button to populate the Excel file with data from the report.



The output data is added to the Excel file, as shown in the following image.

	A	B	C	D
1				
2	**Sales Analysis**			
3			Units	
4	City	Units Sold	Returned	Revenue
5	BOS	1275843	123134	$881,737,037.00
6	DAL	201193	19383	$141,089,667.00
7	LA	165755	28521	$108,025,795.00
8	ORL	213405	20445	$136,998,975.00
9	SEA	97242	9390	$69,131,048.00
10	STL	333143	31765	$224,941,397.00
11				
12	**TOTAL**	**2286581**	**232638**	**$1,561,923,919.00**

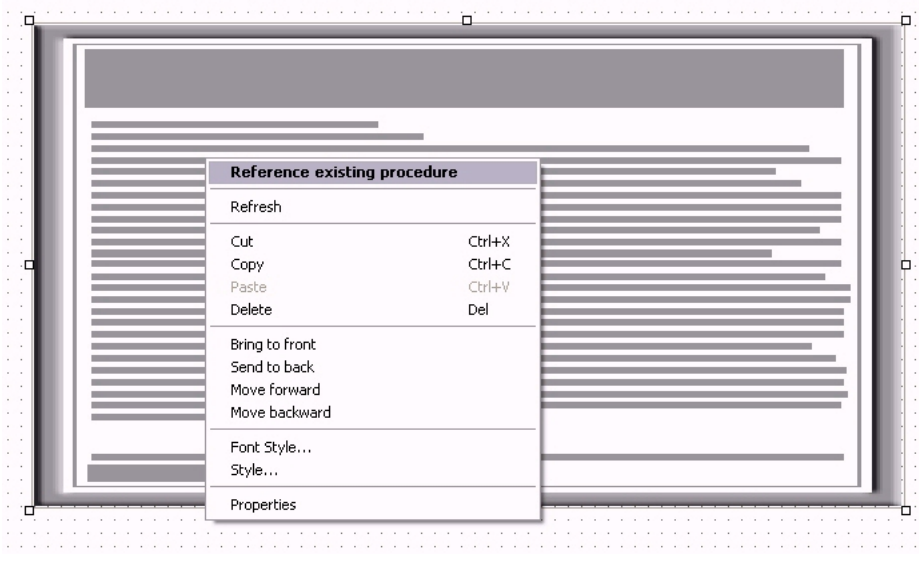
You can edit the query to select different parameter values, or just rerun the same parameter values to refresh the data, by right-clicking any cell in the query and selecting *Edit Query*.

Creating Structured Ad hoc Forms in Developer Workbench

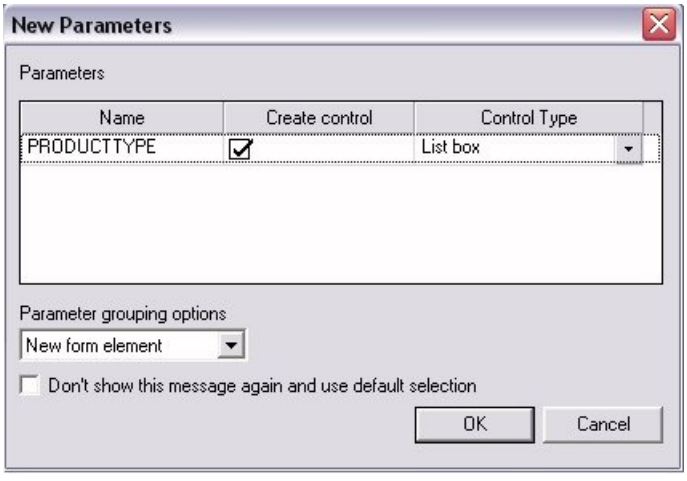
SAFs (Structured Ad hoc Forms) are created in the Developer Workbench Managed Reporting environment using the HTML Canvas, by referencing an existing parameterized Db2 Web Query report. A parameter must be added to a report to make it a valid SAF.

Procedure: How to Create a Structured Ad hoc Form

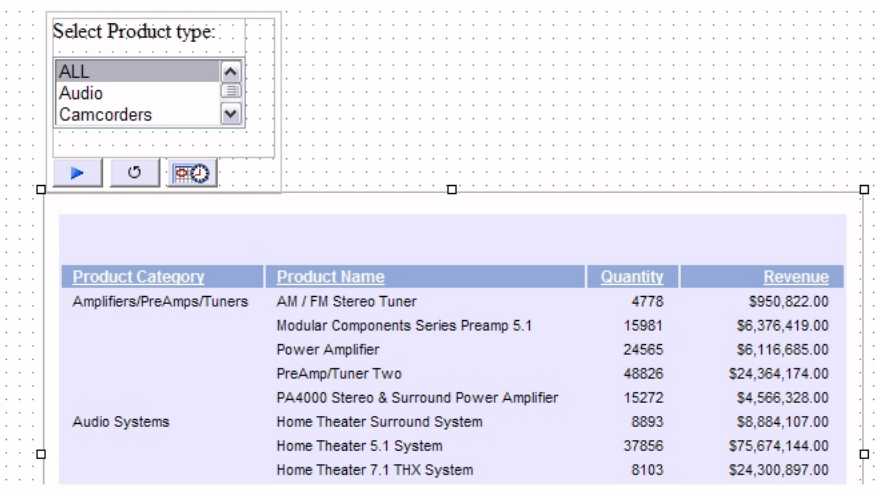
1. Insert a parameterized report into your HTML Layout by referencing an existing report, as shown in the following image.



2. Select the desired options in the New Parameters dialog box that appears.



The completed report that will be used as a SAF in Spreadsheet Client is shown in the following image.

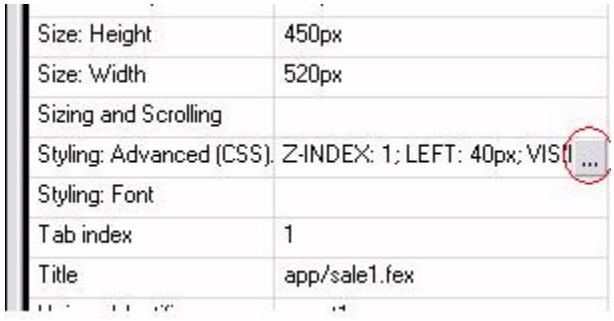


When a SAF is called from Excel, Spreadsheet Client automatically bypasses the report frame in the HTML page and returns the data to Excel. This allows forms to be used in the browser and in Excel.

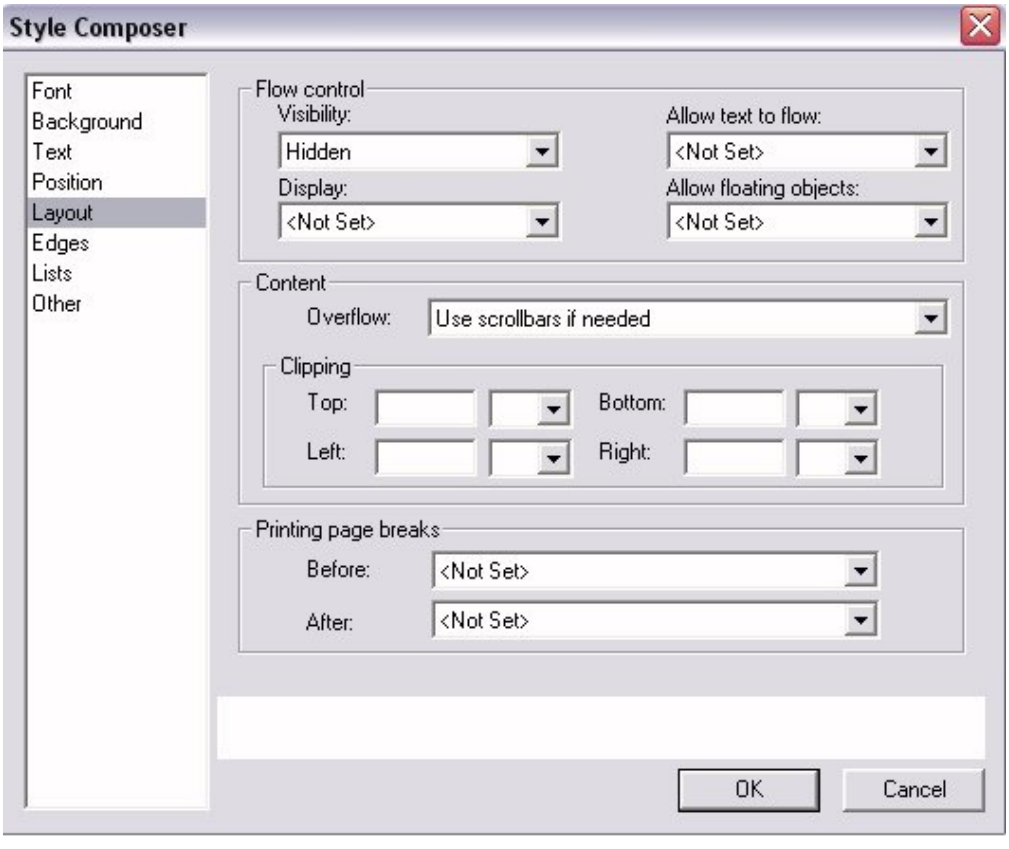
Procedure: How to Hide a Report Frame

If a form is to be used only in Excel, then you can hide the frame by changing the visibility property to hidden in the Layout window of the Style Composer in the HTML Canvas.

1. Highlight the report frame.
2. In the Properties panel, select the Styling Advance ellipsis button.

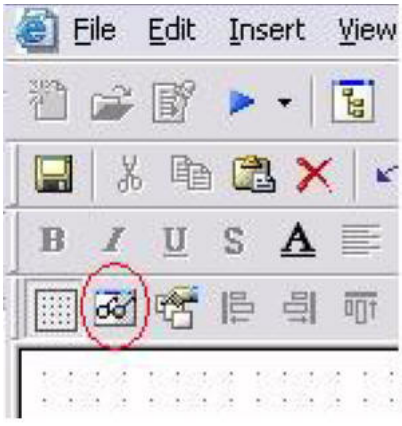


The Style Composer appears, as shown in the following image.



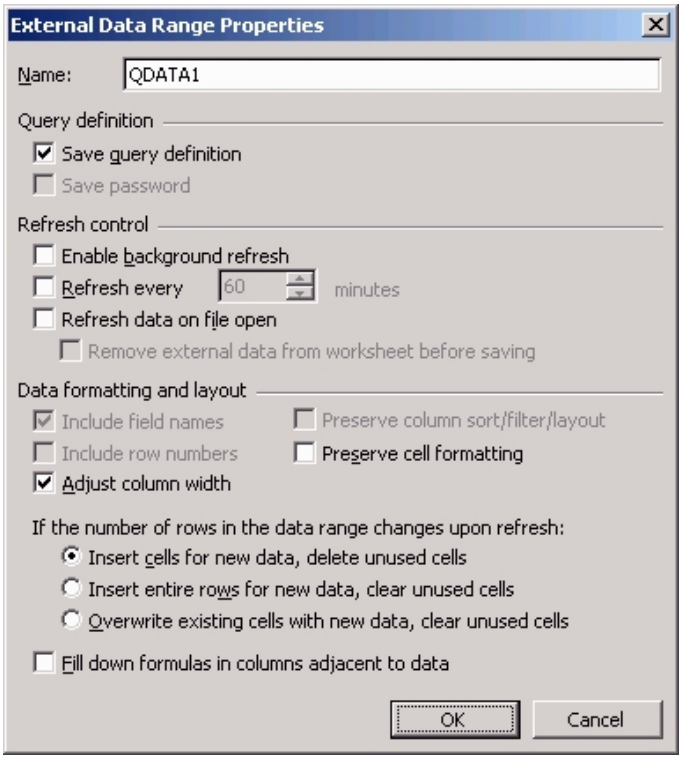
3. Select the *Layout* option.
4. Select *Hidden* in the Flow control Visibility drop-down list.
5. Click *OK*.

Once you hide a frame, you can make it visible in the HTML layout toolbar by clicking the Visibility Toggle button, as shown in the following image.



Setting Query Properties

You can modify query properties in Excel by right-clicking any cell in an existing query and selecting *Data Range Properties*, which opens the External Data Range Properties dialog box, as shown in the following image.



Some of the External Data Range Properties options you can control include:

- **Name.** You can change the name that is automatically assigned to the named range.

  Spreadsheet Client automatically adds a named range to the entire data table and also to each individual column. Named ranges are useful when referencing data as a source for analysis or within an advanced Excel application.

- **Query definition.** Unchecking this option will remove the query from the worksheet. The data remains but is no longer tied to a Spreadsheet Client query.

- **Refresh control.** You can enable background refresh, set the refresh interval, and enable the file to refresh data when opened. If applicable, you can also remove external data from the worksheet before saving.

Defining Data Formatting and Layout

The report layout determines how the data returned from the server interacts with the existing worksheet and any existing content within the worksheet. The following are options you can select in the Data formatting and layout section of the External Data Range Properties dialog box.

- **Preserve cell formatting.** This option affects how data is returned to the worksheet when refreshed. If this option is checked, the existing formatting in the worksheet is preserved. If this option is unchecked, the existing formatting is removed when the query is refreshed.
- **Auto adjustment of existing data.** These options determine how existing data is handled when new data is returned from the query. In some instances, the number of rows returned from the query is more or less than the original data set, and the following options determine what happens when this occurs.
  - Insert cells for new data, delete unused cells.
  - Insert entire rows for new data, clear unused cells.
  - Overwrite existing cells with new data, clear unused cells.

For more information on specifying external data range properties for a query, see your Microsoft Excel documentation.

Running Db2 Web Query Reports Using the Java Batch Run Utility

The Java Batch Run utility (RUNWEBQRY) enables you to run a Db2 Web Query report from the command line so that the request can be submitted to a batch queue, without having to physically sign in to Db2 Web Query. The utility accepts a single report procedure (.fex) that is in Db2 Web Query and executes the .fex using a Java program.

Java Batch Run Utility Prerequisites

The following are prerequisites for running the utility:

- Db2 Web Query must be installed and running on the system where the reporting and application servers are running.
- FOCEXECs which exist in the Db2 Web Query environment.
- An available user ID that is licensed for Db2 Web Query.

Procedure: How to Invoke the Java Batch Run

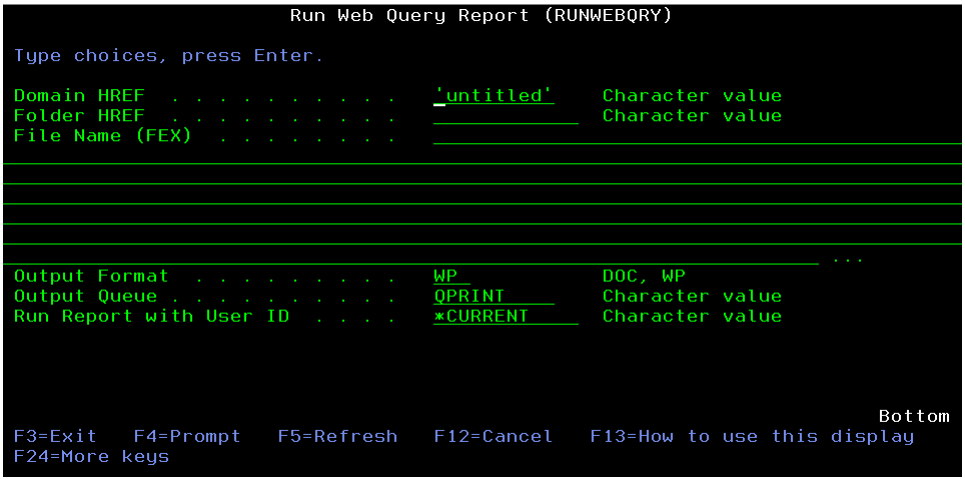
To invoke the utility from the command line:

1. Sign in to the IBM i system using a 5250 terminal emulator.
2. At the command line, execute the following command:

   ```
   RUNWEBQRY
   ```

3. Press the *F4* key.

   The Run Java batch in WebQuery (RUNWEBQRY) screen opens, as shown in the following image.



4. On the screen, type values for the following input parameters:

   Domain href

   Is the domain name in Dashboard or an href. An href is an internal name given to an object. The href can be displayed using the Properties option in the Dashboard menu, which is available by right-clicking the mouse. You do not need to use the href if the name is exactly 8 characters. You need to use the href if the name is less than 8 characters or more than 8 characters. This input parameter can be retrieved from the Properties page by right-clicking the report name and choosing *Properties* from the drop-down menu.

Folder href

Is the folder name in Dashboard or an href. An href is an internal name given to an object. The href can be displayed using the Properties option in the Dashboard menu, which is available by right-clicking the mouse. You do not need to use the href if the name is exactly 12 characters. You need to use the href if the name is less than 12 characters or more than 12 characters. This input parameter can be retrieved from the Properties page by right-clicking the report name and choosing *Properties* from the drop-down menu.

File Name (fex)

Is the full path or name of the report FOCEXEC (fex) as displayed in the BI portal. This input parameter can be retrieved in the Report Properties dialog box by right-clicking the report name and choosing *Properties* from the drop-down menu. Press Ctl+C to copy the full path and report name of the fex, as shown in the following image.

Output Format

Is the report format. Possible values are DOC or WP. WP is the default value.

Output Queue

Is the name of the outq on the IBM i system where the report will be sent. QPRINT is the default value.

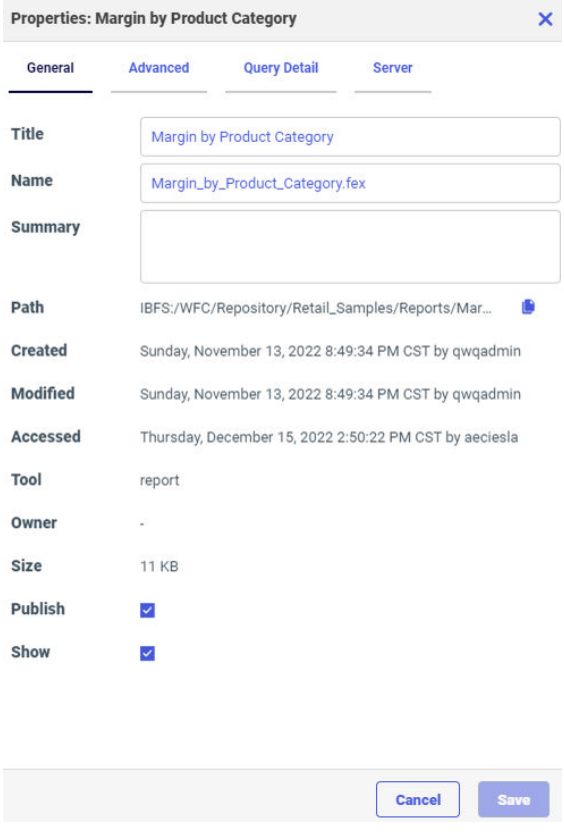
Run Report with User ID

Enables you to submit the job using another user ID. The default value is *CURRENT which means that the current user ID will be used to submit the job.

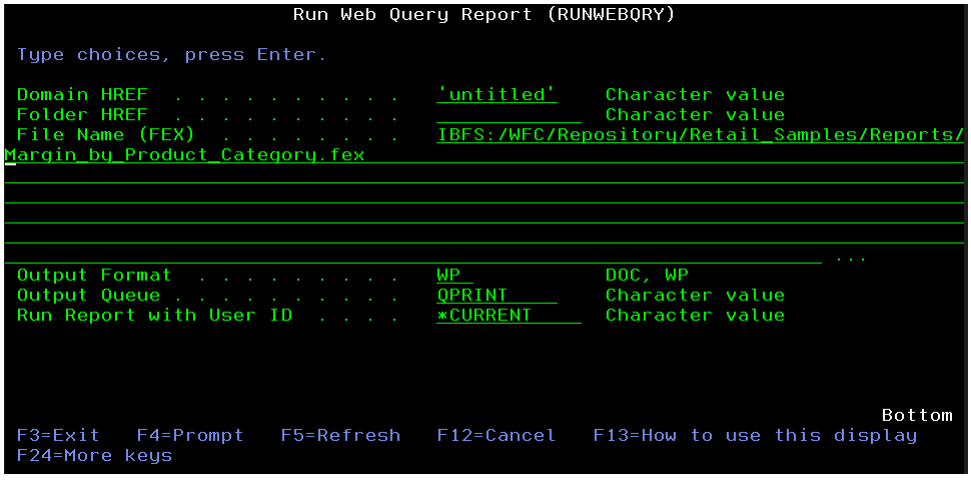
Note: The RUNWEBQRY command can be part of a job stream using SBMJOB to run multiple requests.

Reference: Retrieving Input Parameters for the RUNWEBQRY Command

The following is an example of a Properties page for retrieving parameter information. This page is accessed by right-clicking a report name in a report folder, and choosing *Properties* from the drop-down menu.



The following image shows the input parameters populated from the example properties page.



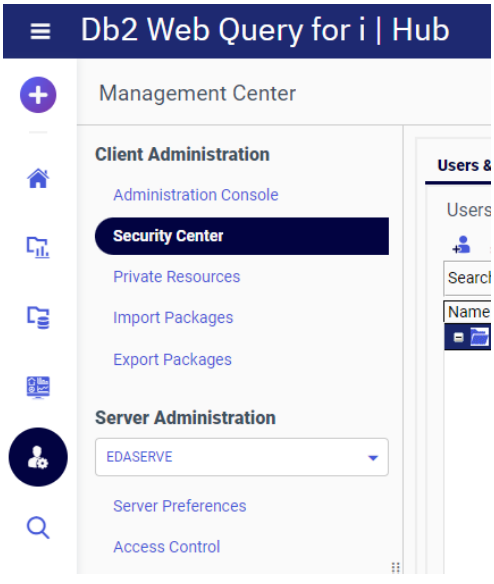
Security Center

User Management is handled through the Web Query Security Center. This is a graphical user interface that simplifies Web Query user administration because it is tightly integrated with License Manager and will dynamically update license information.

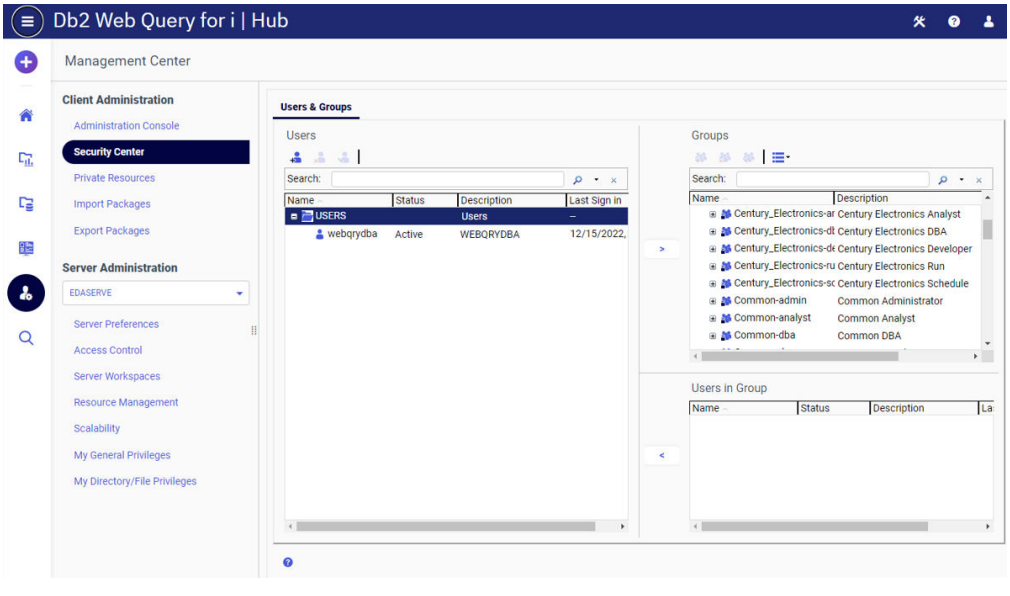
Procedure: How to Launch the Security Center

1. Sign in to Web Query using a Web Query Administrator user ID.

2. To launch the Security Center from the Hub side navigation pane, select *Management Center* and then *Security Center*, as shown in the following image.



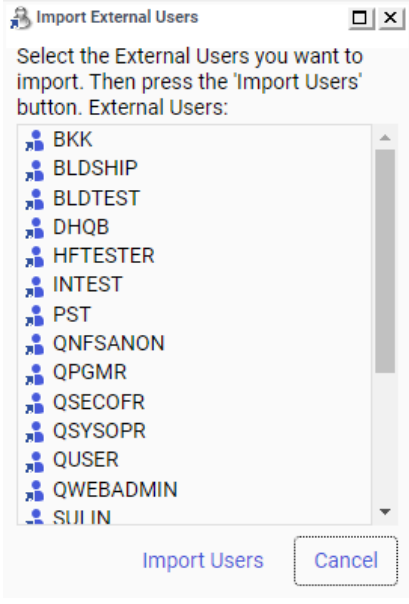
The Security Center opens, as shown in the following image.



Procedure: How to Create a User

Once you add a new folder, you can create users and add them to a group in that folder.

1. Launch the Security Center.
2. Click the *New User*  icon. The Import External Users box opens, as shown in the following image.



3. Select one or more users from the list and click the *Import Users* button to add the user IDs as a named user (developer) to Web Query 5733WQX.

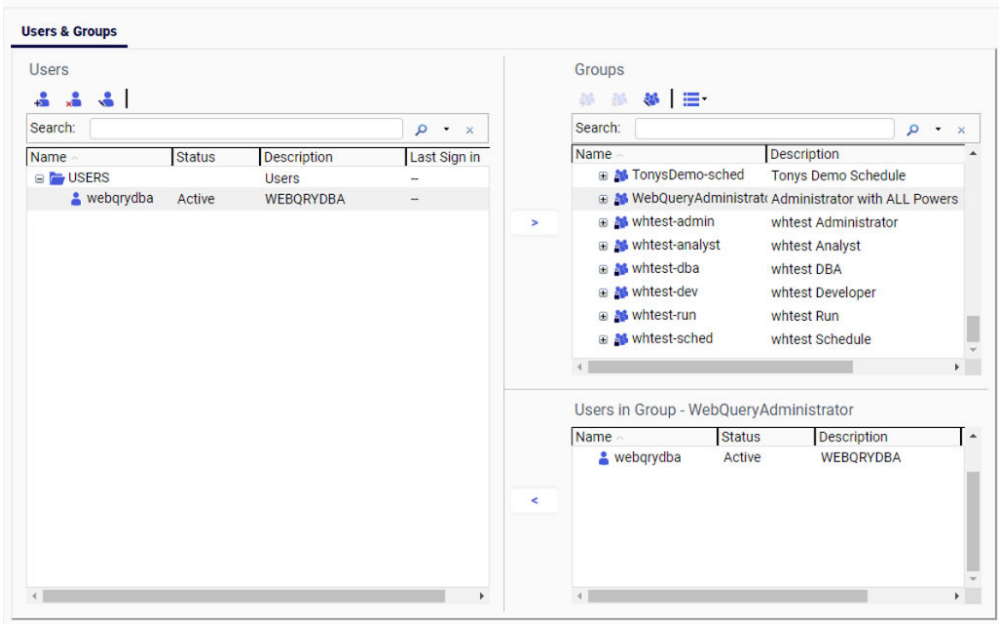
Procedure: How to Designate a Web Query Administrator

The first task in user management is to designate a Web Query Administrator. This procedure shows how to accomplish this using the QWQADMIN user ID and the Security Center interface. Alternatively, an authorized user can use the QWEBQRY/REGWQUSR command.

Web Query Administrator user IDs are able to perform any function in Web Query, except designating and removing a Web Query Administrator.

1. Launch the Security Center.
2. In the Users panel, select the user or users to add to the group.

3. In the Groups panel, select the *WebQueryAdministrator Group*, as shown in the following image.



4. Click the *Add selected users to group* button to add the user to the group.

   Tip: You can also add users by dragging the selected users into a group.

5. Click *Close* to exit the Security Center.

   The owner of this newly added Web Query Administrator user ID can now sign in and manage the Web Query environment:

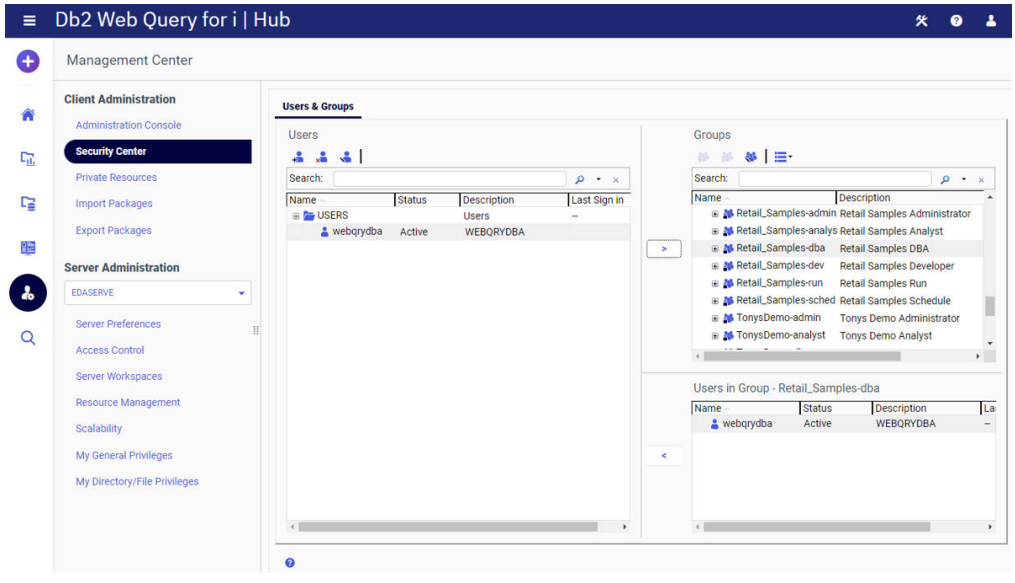
   - ❏ Create top-level folders.
   - ❏ Launch Security Center to add users and assign them to folder groups.

Procedure: How to Add a User to a Group

This example assumes a Sales top-level folder exists in Web Query. The Web Query Administrator user ID or a user ID in the Sales-Admin group can add users to one or more of the six folder groups for the Sales top-level folder.

1. Launch the Security Center.
2. In the Users panel, select the user or users to add to the group.
3. In the Groups panel, select one or more groups that the user or users will be added to.

In the following image, the user wqdev1 is being added to the Sales-dba group. This will make the user a DBA within the Sales application folder.

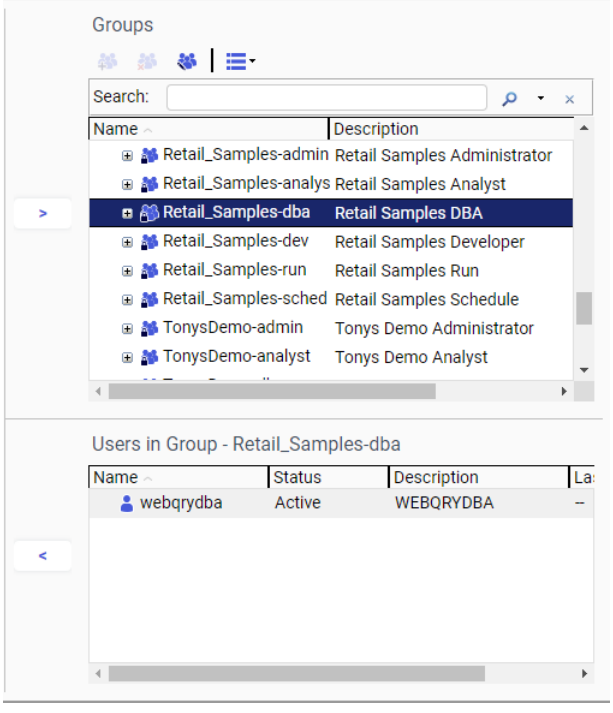


4. Click the *Add selected users to group* button to add the user to the group.

   Tip: You can also add users by dragging the selected users into a group.

5. Click *Close* to exit the Security Center.

The wqdev1 user is now in the Sales-dba group, as shown in the following image.



Adding an IBM i Group Profile to a Web Query Folder-run Group

IBM i group profiles are assigned to authorize a user for the Web Query Runtime Enablement feature. This section describes how to add an IBM i group profile to a folder-run group.

Note: The migration procedure performs this procedure for any group profiles that were assigned to users in Release 1.1.x.

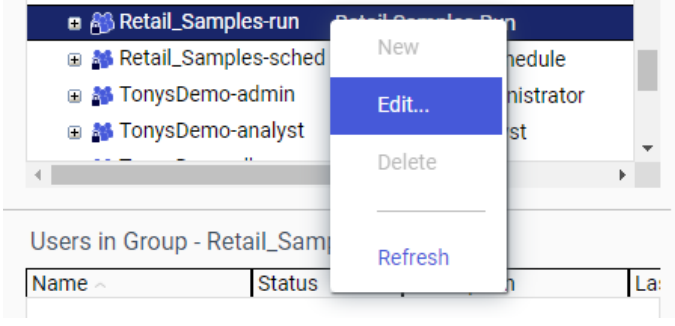
Procedure: How to Assign an IBM i Group Profile to a Folder-run Group

This procedure assumes a Sales top-level folder and the objective is to assign the MUSALES group profile to the Sales-run group to allow users with this group profile to run reports in the Sales top-level folder.

Note: Any existing group profile can be assigned to a folder-run group role. The group profile does not have to be an MUxxxxx group profile.

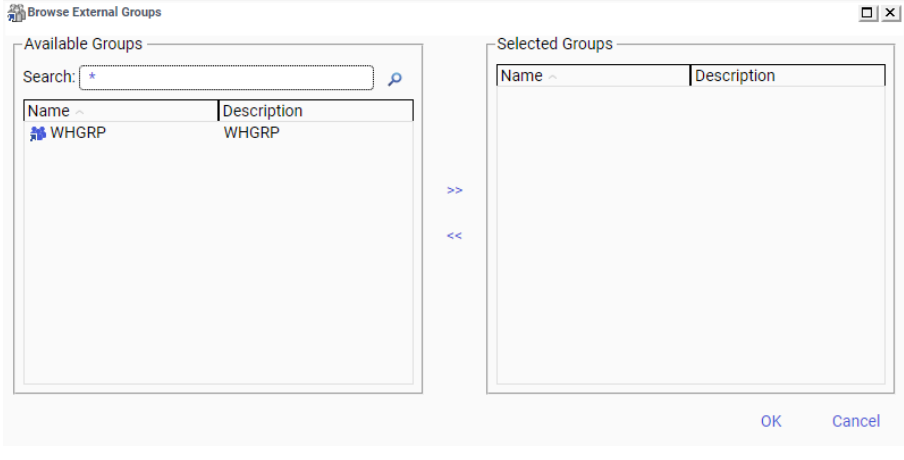
1. Sign in as a Web Query Administrator or folder administrator.
2. Launch the Security Center.

3. In the Groups panel, select the folder-run group that should be associated with the IBM i group profile.
4. Click the *Edit Group* button or right-click the folder-run group and select *Edit*, as shown in the following image.



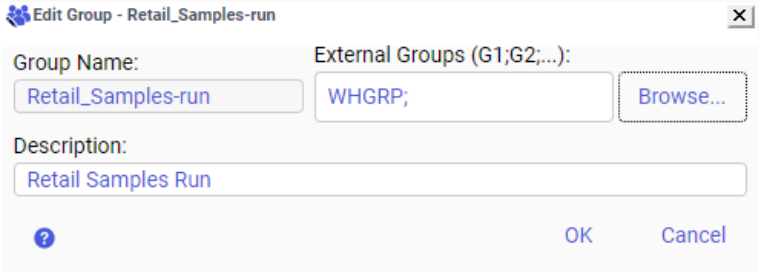
The Edit Group dialog box appears.

5. Click the *Browse* button to retrieve a list of IBM i group profiles, as shown in the following image.



6. Click the *Add all selected Groups* button to add the selected group profile to the Web Query folder-run group. In this example, the IBM i group profile MUSALES is being added to the Web Query Sales-run group.

7. Notice a Group is now associated with the Web Query folder-run group, as shown in the following image.



8. Click *OK*.

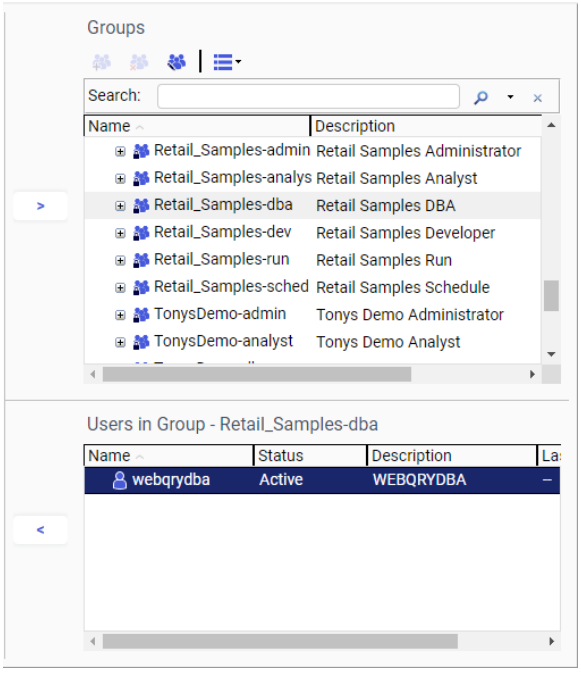
   Notice the Sales-run group icon has changed to indicate a linkage to an IBM i group profile.

9. Click *Close* to exit the Security Center.

Procedure: How to Remove a User From a Web Query Group

1. Launch the Security Center.

2. In the Groups panel, select the group that you want to modify. The members of the selected group are listed in the Users in Group panel, as shown in the following image.

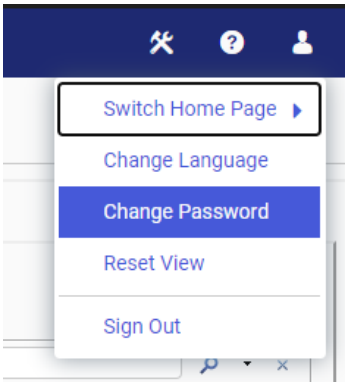


The reference to groups in this context do not refer to IBM i group profiles. In the proceeding image, a user is being removed from the Sales-dba role and not an IBM i group profile.

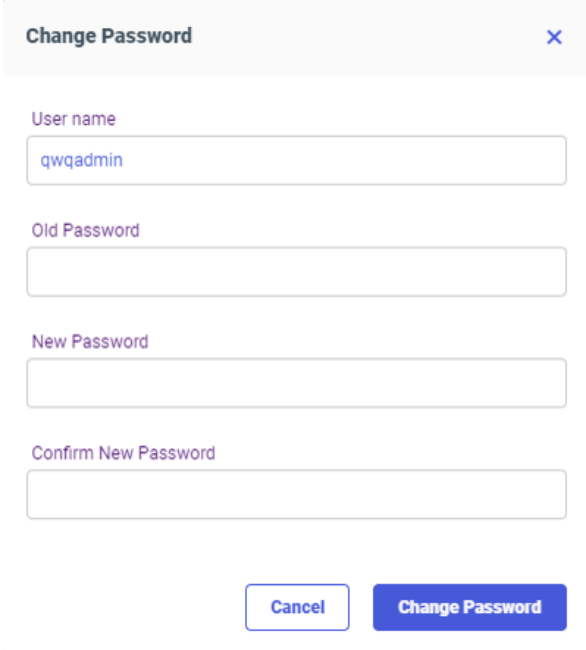
3. In the Users in Group panel, select the user or users that you want to remove from the group. You can choose multiple users by pressing the Ctrl key as you make your selections.
4. Click the *Remove selected users from group* button to remove the users from that group.
5. Click *Close* to exit the Security Center.

Procedure: How to Change a User Password

1. Click the user ID description on the menu bar and select *Change Password*, as shown in the following image.



2. On the Change Password dialog box, as shown in the following image, type the current password, then the new password, and then type the new password again to confirm the change.

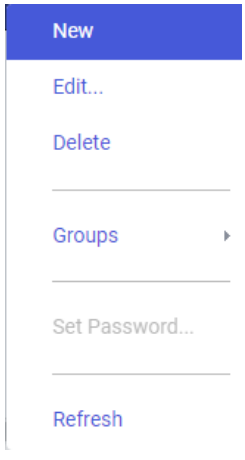


3. Click *OK* to save the changed password.

Procedure: How to Manage a User and Their Attributes

If you are an Administrator:

1. Launch the Security Center.
2. In the Users panel, right-click the user and select any one of the following options, as shown in the following image.



New

Creates a new user.

Edit

Edits the user attributes.

Delete

Deletes the user.

Groups

Opens a submenu that contains the following options:

- **Group membership report.** Generates a report listing all the groups to which the user belongs.
- **Remove from.** Opens a dialog box to remove the user from one or more groups.

Refresh

Refreshes the Users panel.

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