
# ibi Golden Summit

## Designer Hidden Gems

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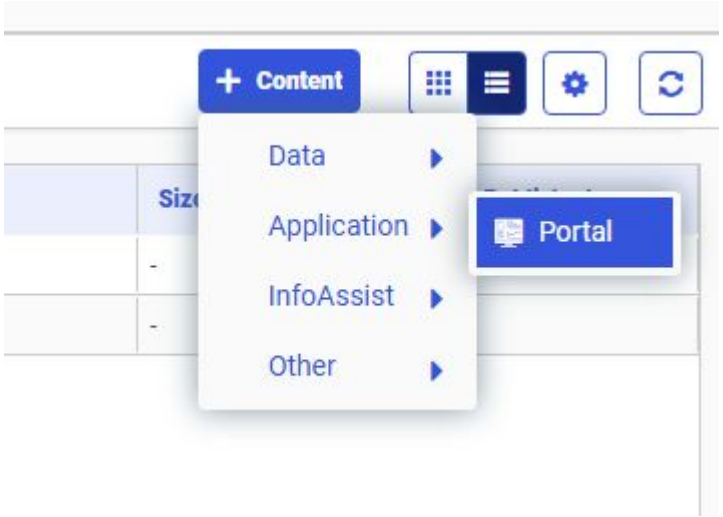
# Agenda

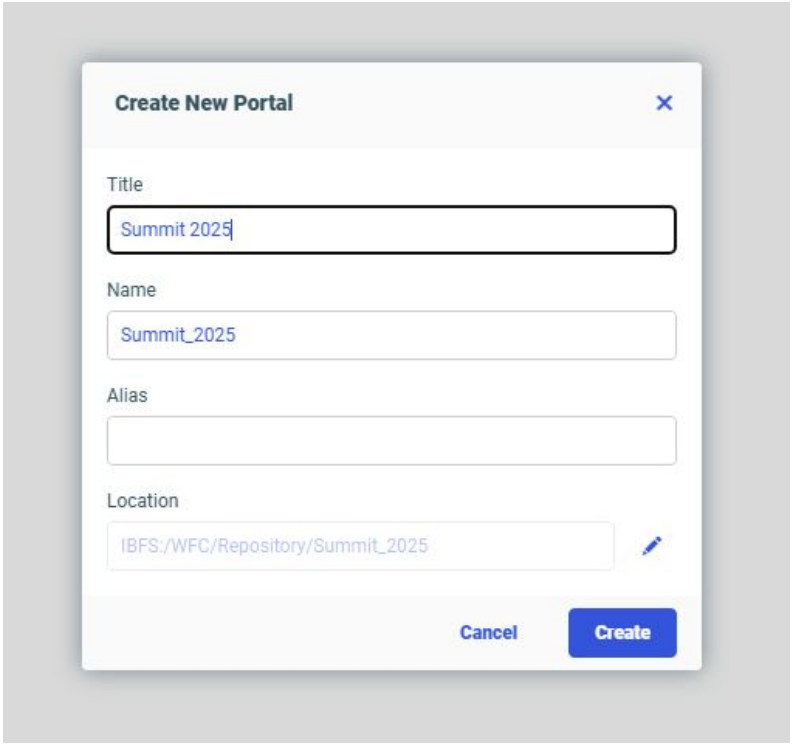
- Welcome
- Designer Hidden Gems - Hands on Lab
  - Global Name Property
  - Interactions
    - Event trigger Interactions
    - Adding JavaScript
  - Drill downs
    - Drilldown to a Target Panel on a Page
    - Navigate to a Designer Portal Page

# Let’s create our Portal!

# WebFOCUS Designer Portal

1. Click on +Content > Application > Portal
2. Name the Designer Portal
3. We will be adding content to the portal as we move through the lab



# Synchronizing Filters

# Global Name Property

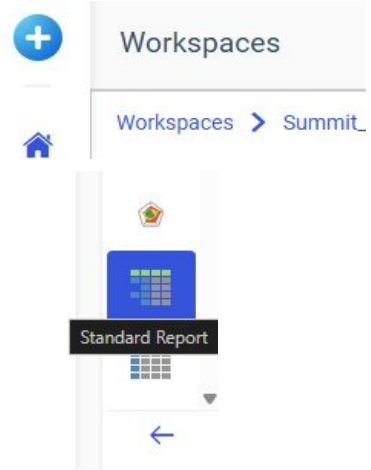
It is a powerful tool that allows you to to synchronize filter control values between different pages.

- Parameter Passing
  - When you assign the same global name to filter controls across different pages, they become linked.
  - Essential for building multi-page dashboards or portals where a user might navigate between pages while keeping the filter controls intact.
- Reusability
  - Assign the same exact global name to a filter control on a different page!
- User Experience
  - It creates a more intuitive and consistent user experience

# Exercise 1: Create Visualizations!

Create two Designer reports using our sample master file, WF_RETAIL_TINY.mas

1. From the WebFOCUS Hub, expand the PLUS menu
2. Select, Create Visualizations
3. Select, retail_samples > wf_retail_tiny.mas
4. From the 'Content Picker', select Standard Report
5. Add, Product Category to the Rows bucket
6. Add a couple more dimensions and/or measures
7. Drag, Product Category to the Filter Toolbar
8. Save.
9. Repeat for second report



# Exercise 1 cont.: Assemble Visualizations!


1. Navigate back to the WebFOCUS Hub
2. Expand the PLUS menu > select, Assemble Visualizations
3. Add, Report 1 from the Content Panel onto the Designer Canvas
4. Click on Filters from the Sidebar
5. Click, Add all filters to page
6. Select the, Product Category, filter
7. Look for the ‘Global Name’ property on the Settings panel
8. You can choose any text as a global name, for this example, let’s name it ‘category1’
9. Save.
10. Create a secondary Designer Page with the second report
11. Remember to add the same Global Name to the filter control on the second Designer Page!

# Add the Pages to our Designer Portal


Remember the Designer Portal we created earlier? Let's add both pages to it!

1. Right-click the Portal > select, Edit Designer Portal
2. On the sidebar, select Content
3. Drag, DesignerPage1 and DesignerPage2 to the Portal canvas, where it says, 'Drop sections and pages'
4. Select, 'Add content as a link'
5. Since it autosaves, try running the portal to see the Global Name property in action!



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# Interactions

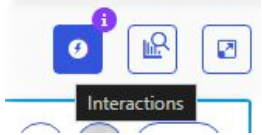
# Interactions

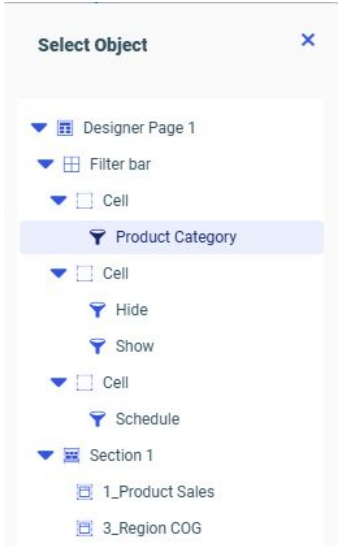
Event triggers

- Show and Hide an object
- Schedule content
- Run content

# Interactions - Hide & Show

1. Lets edit ‘Designer Page 1’ by right-clicking on Designer Page 1 > Edit
2. From the Sidebar, select ‘Controls’
3. Select and Hold the ‘Button’ control and drag it onto the Filter Toolbar
   You can place a button on its own cell or add multiple buttons in one cell
4. We will be creating 2 buttons on this page
5. Once we create the buttons, let’s rename them to,  Hide and Show
6. Click on the ‘Interactions’ button
7. Click on ‘+ Add Interaction’
8. This will display an Object overlay
9. Select the ‘Hide’ button that we created.
10. We can rename the interaction by right-clicking ‘Interaction 1’
    Select Rename. Let’s rename the interaction to Hide Button
11. In the Interactions overlay, You will be presented with a few options
12. We will select the Event type, in this case, a Click Event
13. Now we will set the Task for this button.
14. Click on ‘Select an action’ to display its options > Hide object
15. Select an object. For this lab, we will hide ‘3_Region COG’



# Interactions - Hide & Show, cont.

We will create an Interaction for Showing an object

1. With the Interactions window still open
2. Click on '+ Add Interaction'
3. This will display an Object overlay
4. Select the 'Show' button that we created earlier
5. We can rename the interaction by right-clicking 'Interaction 1'
   Select Rename. Let's rename the interaction to Show Button
6. We will select the Event type, in this case, a Click Event
7. Set the Task for this button.
8. Click on 'Select an action' to display its options > select, Show object
9. Select an object. For this lab, we will show '3_Region COG'

Now we've set a Click event to a button without any coding!

# Interactions - Schedule button

1. We will create a third button for this page
2. From the sidebar, click and drag a Button control onto the Filter bar
3. Rename the button to Schedule Button
4. Open the Interactions menu > Click on '+ Add Interaction'
5. Select the 'Schedule' button
6. As it is a button, we will select the event type to be a click event
7. Set the Task > select, Schedule content
8. Click on 'Select Content'. We can schedule any report that is available in this workspace
9. Expand, 'Select a mode'
10. This will present a list of Scheduler modes. You can select any one of these modes. For this lab, let's schedule it to the Repository
11. Expand, 'Select a target'. This will present a list of how we would like to display the Report Caster interface. Let's select Page overlay

Now when we click on the Schedule button, it will display an overlay of distribution method.

# Interactions - Run Content


From the previous exercise, we created buttons with a click event. With Interactions, we can also configure a control, like a dropdown control to execute content and display them in the Designer container.

Let’s get started!



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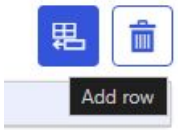
# Interactions - Run Content

1. Navigate back to the WebFOCUS Hub
2. Edit, Designer Page 2
3. From the Sidebar > Controls > Drag the Dropdown control to the Filter Bar
4. Rename the Dropdown to, Choose a Report
5. Select the Control and navigate to the Settings panel
6. Under ‘Control Source’, click on the pencil icon to add sources
   We will be adding a few static values to this control
7. Select, Static as it’s Data Type
8. Add 3 Rows by clicking the ‘Add Rows’ icon
9. We will add a few Values and Display Values
   - Original Report
   - 2a_COG vs Revenue
   - 2b_Product Descriptions
10. Let’s configure the Interactions to associate the value to a report



# Interactions - Run Content, cont.

1. Click on the Interactions button and click, '+ Add Interaction'
2. Select the Dropdown control that we need, 'Choose A Report'
3. Rename the interaction, –for example, Choose Report
4. For a dropdown control, the event will be a Selection Change
5. The first task, select the action as Run Content
6. Navigate to the Designer Hidden Gems Workspace and select, 2_SubProduct Cost
7. Select Container as its Target
8. Now we will select the target Container. Let's replace the 2_SubProduct Cost container
9. Let's repeat steps 5-8 to create additional tasks so that we can execute additional reports

# Interactions - Run Content, cont. Task 2 + 3

1. Create an Additional Task by clicking on, '+ Add Task'
2. We will select, Run Content
3. Navigate to the Designer Hidden Gems workspace and select, 2a_COG vs Revenue
   *These were the static values we set for the Dropdown control
4. Select Container as it's Target
5. Select the 2_SubProduct Cost container

Task 3

1. Add an additional task
2. We will select, Run Content
3. Navigate to the Designer Hidden Gems workspace and select, 2b_Product Descriptions
4. Select Container as it's Target
5. Select the 2_SubProduct Cost container

# Interactions - Conditions,cont.


Now that we configured all the tasks; we now have to configure the condition for the selection change to execute the appropriate report.

1. In the Interactions window, right-click Task 1 and select, Add condition
2. Expand the ‘Select Control’ dropdown menu and select, Choose A Report
3. We will leave the Value compare Operator and Multiselect operator as is.
4. Expand the ‘Compare to values’ dropdown
5. Move, ‘Original Report’ from the left pane to the right pane. Click OK

This will set the Interaction so that when a user select, Original Report, the task is to run the original report that we configured in this Designer Page.

Repeat steps 1-5 for the remaining values for the second and third tasks.

Select 2a_COG vs Revenue for the second condition

Select 2b_Product Descriptions for the third condition

Now when we run the Designer Page and make a selection change to select a report, it will display in the container that we set.

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# Interactions

JavaScript

# Interactions - JavaScript


In the previous exercise, we learned how to create action buttons without writing any code. However, you also have the option to configure a control to execute a **JavaScript function**. This provides more flexibility and power for customizing your application's behavior.

Let’s add some simple JavaScript functions to our Designer Page!



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# Interactions - JavaScript

1. Edit, Designer Page 2
2. From the Sidebar > Controls > Create two buttons and place them in its own filter cell
3. Rename the buttons
   JavaScript from Interactions
   JavaScript from Designer JS Canvas
4. From the Sidebar > select, Outline > JavaScript
   In this text editor, we can add any JavaScript to be ran on the Designer Page

   I've already placed a simple JS function that we will call in an Interaction.
5. Click the little red X to close the editor to go back to the Designer page.

# Interactions - JavaScript, cont.

1. Let's add some JavaScript to our button
2. Open the Interactions dialog and click '+ Add Interaction'
3. Select, JavaScript from Interactions
4. It will be a Click event
5. Expand the dropdown for the Task and select, Execute JavaScript function
6. Click, Add JavaScript function
7. This will open a textbox to enter the JavaScript function's name.

We can run simple JS functions directly here, –for example,

```
alert("From Interactions!");
```

If we want to run the function from the JavaScript text editor, we can enter the function name here, –for example,

```
fromDesignerPage();
```

# Drilldowns

- To a Target Panel on a Page
- To another Designer Portal Page

# Drilldown to a Target Panel on a Page


WebFOCUS offers a pre-configured JavaScript function called portalDispatch to drill to a target chart or report, and run it in a specified target container on a page.

You must ensure that the portalDispatch JavaScript function is recognized, by specifying the location of the .js file on the WebFOCUS Reporting Server.

First, we create the drilldown target using WebFOCUS Designer.

Second, we create the content that will contain the drilldown link.

Third, we create the Page to run the Drilldown content.



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# Exercise 2: Create the Target Content

1. Expand the PLUS menu > Create Visualizations
2. Select, retail_samples > WF_RETAIL_LITE.mas
3. Select Standard Report
4. Add dimensions and measures to the target report
5. Add, PRODUCT CATEGORY, to the filter toolbar
6. Right-click the PRODUCT CATEGORY filter and change it to Single Select

# Exercise 2: Create the Drilldown link Report


1. On the WebFOCUS Hub, expand the PLUS menu > Create Visualizations
2. Select the data source; This should be the same data source that we used for the target content. In this case, we will select, retail_samples > WF_RETAIL_TINY.mas
3. Add, PRODUCT CATEGORY to the query
4. Right-click PRODUCT CATEGORY > Configure Drilldowns
5. Click the PLUS to configure a new drill down
6. Select JavaScript
7. Add, portalDispatch as the JavaScript Function
8. Under, Request Parameters, we will be adding several arguments for the JavaScript function.



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# Exercise 2: Create the Drilldown link Report


| | Type | Field/Value |
|---|---|---|
| 1. | Value | drillRefresh |
| 2. | Value | self |
| 3. | Value | panel1 panel2 (CSS className that will identify the CONTENT area) |
| 4. | Value | IBFS path of an item |
| 5. | Value | Parameter name used to filter the target content |
| 6. | Field | FIELD associated with the Parameter |

You can add additional parameters if you'd like

| | | |
|---|---|---|
| 7. | Value | Parameter name |
| 8. | Field | FIELD of the associated parameter |



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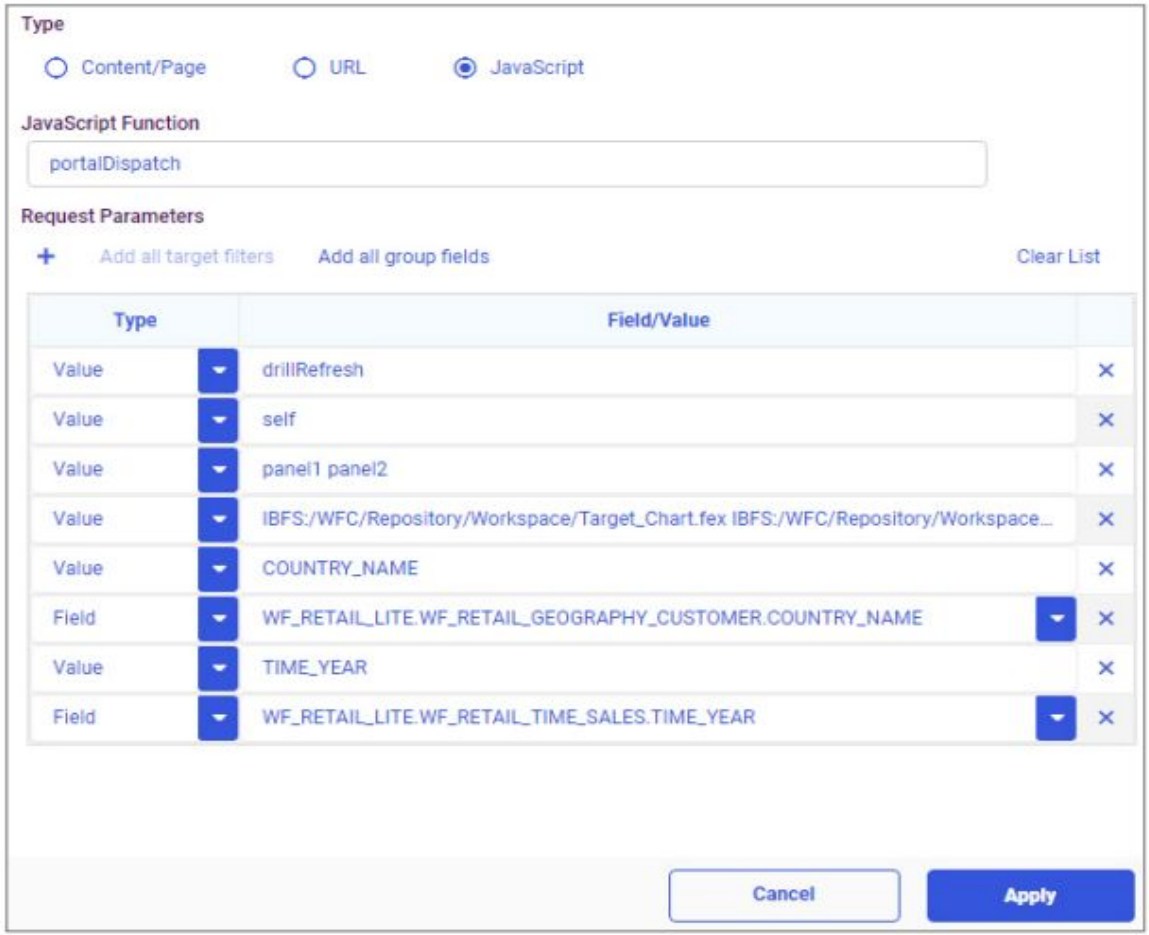

# Exercise 2: Create the Page


Before we create the Page, we have to define the .js file. We can use the SET JSURLS command to specify the location of the .js file in the WebFOCUS installation that includes the portalDispatch function. The SET JSURLS command can be added to the EDASPROF server profile to make it available to all procedures.

SET JSURLS = '/ibi_ apps/tools/portalcanvas/iframeinterface.js'

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1. From the WebFOCUS Hub > PLUS menu > Assemble Visualizations
2. We can select the blank template
3. Add both, the drill down link report and drill target reports to the Designer canvas
4. Remember from the previous step, we set the class name to panel1
5. Select the content pane within the container, add, panel1, to the Classes textbox
6. Save as DesignerPage3
7. Let's add this page to our Designer Portal!



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# Drill to another Page

# Navigate to a Designer Portal page


Some times, we may want to view the data in another page instead. You can use another WebFOCUS supplied JavaScript function to dynamically navigate to other pages within your Designer Portal.

For this exercise, we will simplify this and re-use the drilldown reports from the exercise 2.

Before we continue, let's add Designer Page 4 and Designer Page 5 to our Portal!



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# Exercise 3: Navigate to another page


1. Navigate to the LAB workspace and duplicate ‘drill_parent.fex’ and ‘drill_target.fex’
2. We’ll create two new Designer Pages
3. For the first Designer Page, add drill_parent_1.fex to the canvas
4. For the second Designer Page, add drill_target_1.fex to the canvas AND add the parameters to the filter toolbar
5. Edit the Designer Portal and add the two newly created Designer Pages
6. Right-click ‘drill_parent_1.fex’ and open it up in the Designer GUI
7. Right-click PRODUCT CATEGORY > Configure Drill Downs
8. Delete the existing drilldown and create a new drill item
9. Select the type as JavaScript
10. Enter, portalDispatch as the JavaScript function
11. Under, Request Parameters, we will be adding several arguments for the JavaScript function.
12. We will be using a function called, navigateToPage > this will be the first value
13. Second value > This will be the IBFS path to the page we want to drill to
14. Navigate back to the WebFOCUS Hub, right click the Designer Portal > select OPEN



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# Exercise 3: Navigate to another page, cont.

15. Right-click the 5th Designer Page > Properties > Copy the Path
16. Go back to drill_parent_1.fex on the other tab
17. For the second value, add the path that we just copied
18. For the third value, add the parameter name, in this case, DF_WH_PRODUCT_CATEGORY
19. For the fourth value, select the type as FIELD and select the PRODUCT_CATEGORY field
20. Click Apply.
21. Save the Report.

# Exercise 3: navigateToPage values


| | Type | Field/Value |
|---|---|---|
| 1. | Value | navigateToPage |
| 2. | Value | IBFS path to Target **Page** |
| 3. | Value | Parameter Name |
| 4. | Field | FIELDNAME of the parameter |

You can add additional parameters if you'd like

| | | |
|---|---|---|
| 5. | Value | Parameter Name |
| 6. | Field | FIELDNAME of parameter |



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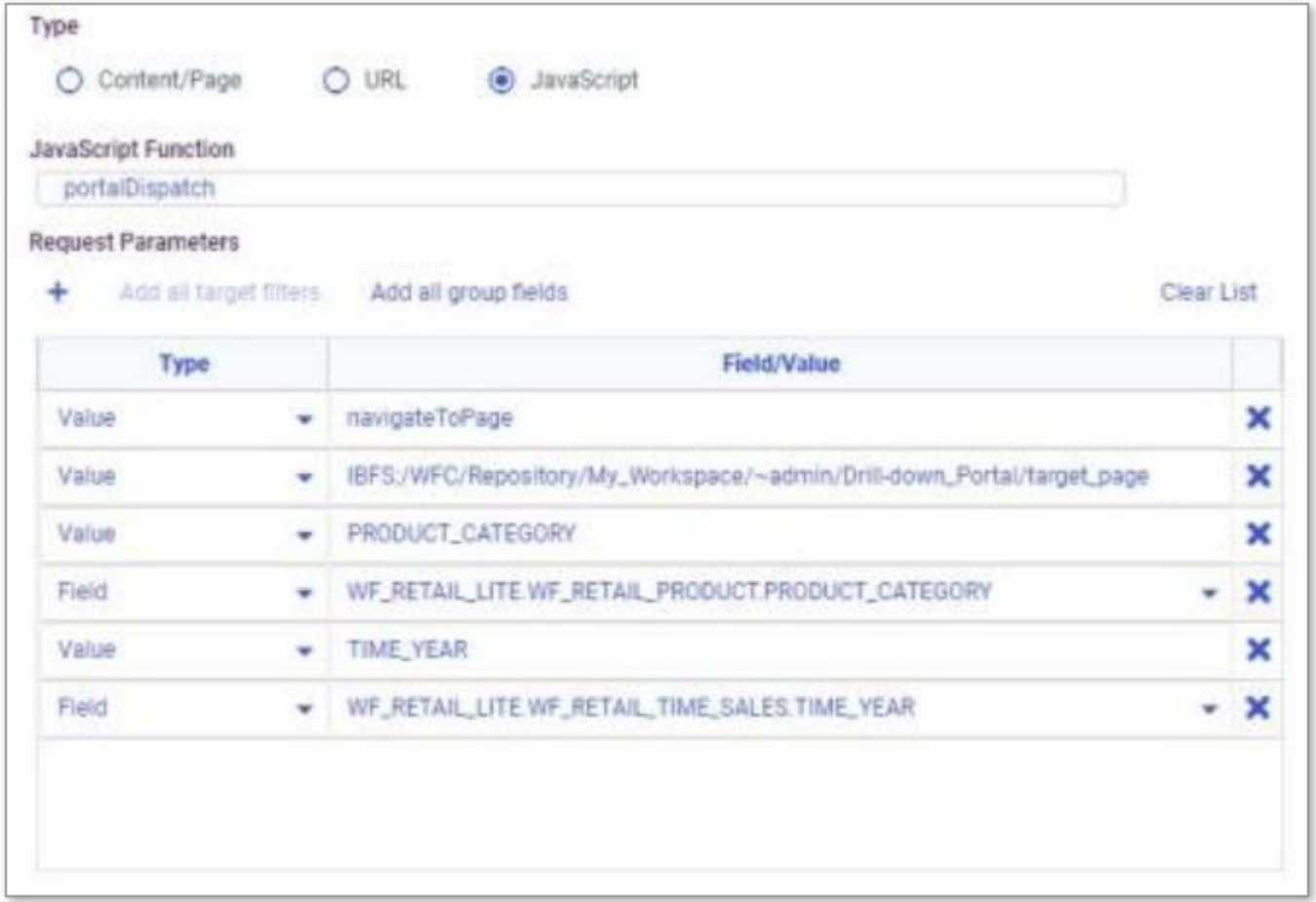

# Let’s add the last two pages to our Portal!

- Let’s see it all working together!




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