ibi Summit 2026

Build it: Interactive Visualizations in Designer

A streamlined workflow that allows you to visualize and assemble interactive pages.

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Session Agenda

- **Create engaging Designer content using the latest features and updates.**



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Assemble Visualizations



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Little Details, Big Results

Flexible Date Displays

- ➔ Select and update date display formats on Assembled pages
- ➔ Empowers users to view Assembled pages in their preferred date format for a tailored experience.

New Quick-Access Menus

- ➔ Easily add containers on Assembled pages with a single click
- ➔ Updated placement for the JavaScript and CSS editors for quick access
- ➔ Enhancement to the interactions menu

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Get started!

- ➔ Create a new Assemble Visualization – Designer Page
  - We can start with a blank template or you can select another common template
- ➔ Add some content!
  - Navigate to Content, go back to the Retail Samples workspace
  - Navigate to the Portal workspace > Small Widgets > Let's add 'Category Sales' to the canvas
- ➔ Create a tabbed container using the shortcut menu
  - Expand the 'Add container' menu and select, Tab to create a Tabbed Container
  - From the 'Small Widgets' workspace, Let's add a couple of charts to the tabbed container
- ➔ Include all of the filters

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Restricting a Date Range

- ➔ With ‘Category Sales’ and it’s filters added to the canvas
- ➔ Combine the ‘From’ and ‘To’ date filters
  - ○ You can do so by multi-selecting both filters using CTRL key and clicking both filters
  - ○ With both filters selected, Right-click > select, Combine
  - ○ Once combined, let’s rename this filter
    - ■ Right-click > select, Edit Title > Enter a name, –for example, Date Range
- ➔ In the Settings panel, locate ‘Data Settings’
- ➔ To restrict a date range, click on the checkbox to enable it.
  - ○ To set a restricted date range:
    - ■ Click on the calendar icon and select a date range that you would like to restrict
    - ■ You can select a Custom date range or use a Relative date option
      - ● Optional: You can disable, ‘Enable advanced date options’ for a simpler calendar control
- ➔ Save and Run the page

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Build an interaction using custom JavaScript

- ➔ In the Retail Samples workspace, there is a JavaScript file that contains a couple of functions that we can add to our page.
  - Navigate to the Retail Samples workspace and right-click, SampleJSFunctions.js > Edit
  - CTRL+A and copy all of the functions.
  - Navigate back to the Designer page that you were working on
  - From the sidebar, click the JS editor
  - We can remove the commented code and paste the JS function
    - Keep in mind of the JS functions we'll be calling:
      - setDesigner();
      - setLight();
      - setMidnight();
      - updateDetailsText();

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Build an interaction using custom JavaScript Pt. 2

- ➔ Add a Radio control to the filter toolbar
  - Rename the control – for example, Select Theme
  - From the Settings panel, scroll down to Control Source and click on the Pencil icon
    - Add 3 static values (same for Display): Designer, Light, and Midnight
- ➔ Build the Interaction
  - Click on the Interactions button on the top right to open the dialog
  - Add an interaction > select the, ‘Select Theme’ radio control
    - Event = Selection change
    - Task = Execute JavaScript function
      - Create 3 tasks for each JavaScript function
    - If we run the page now, nothing will happen. We have to add Conditions!
      - Under each task, click on the ellipses menu and add a condition
      - Select the ‘Select Theme’ control. Set the compare value corresponding to the function for the task.

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Build an interaction using custom JavaScript Pt. 3

- ➔ We know we can set a default Value and Display Value, but we can use JavaScript to enhance the functionality. This part is a simple implementation using Custom JavaScript
- ➔ Create a checkbox control and add a single static value called, Hide details
- ➔ Set it to ‘Hide’ the tabbed Container
- ➔ Create Tasks to control the behavior
  - Task 1 - Set if the Checkbox is EQ Hide details, then Hide the container
  - Task 2 - Set if the Checkbox is NE to Hide Details, then Show the container
- ➔ So if you run the page now; we just have a checkbox that just hides the container.
  - Kind of boring, right?
- ➔ We can add a simple JavaScript function to make it more robust
- ➔ Create a new task (Task 3) to Execute JavaScript function
  - Enter, updateDetailsText()
- ➔ Now run the page. Notice now that when we Hide the details, we force it update the inner text to ‘Show’ the details.

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More Details, Bigger Impact

Exploring the New Single-Select Default Experience

- ➔ In previous releases, to set a default value to single-select filters; there was an input box and you had to type in a value correctly. In 9.3.8, we provide a dialog, similar to multi-select filter controls.
- ➔ With the enhanced dialog, you can view and filter through your values and select a default value.

Enabling suggestions

- ➔ Only available for single select filters
- ➔ By minimizing database queries until input begins and enabling one-click selection of matching values, this feature reduces system load while accelerating data entry for users.
- ➔ Suggestions are dynamically fetched from an assigned data source binding only after the user types the first character

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Export & Import Bookmarks

- ➔ Run the page and create a bookmark
- ➔ Expand the kebab menu
  - ○ Select, Export bookmark…
    - ● This will download a .bmk file to your local system
      - ○ With this file, you can share it however you like
        - ◆ Teams, Slack, Email, etc.
- ➔ To import the .bmk file
  - ○ On the Designer page, expand the Bookmark menu
  - ○ Next to the Search box, there is an ‘Import bookmark…’ option
  - ○ Selecting this will open the file system to select the .bmk file
- ➔ **Bookmark Import Caveats**
  - ○ The importing user must have permissions to view and run the Assembled page.
  - ○ Bookmarks are locked to the specific page path where they were created. Importing a bookmark into a different page triggers an error.
  - ○ If an imported bookmark shares a name with an existing bookmark, a dialog prompts the user to either Overwrite or Save as New.
  - ○ Imports defaults to .bmk files. Non-bookmark will trigger an Import Error.

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Designer Portal: Custom Favicon Support

- ➔ Configure a custom favicon in **Settings > Banner**
- ➔ The custom favicon appears in the browser tab when running the portal; design mode continues to display the default favicon.
- ➔ Create a new Portal
  - Expand the '+ Content' menu > Application > Portal
  - Name your portal.
    - You can use your username that you logged in with.
  - Under Settings, expand the Banner accordion
  - Check, 'Enable custom favicon'
  - Click on the pencil icon to upload a favicon
    - For this lab, there is favicon located in the Retail Samples workspace, ibi_favicon.ico

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Create Visualizations



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Designer Features Spotlight

- ➔ AHTML options are now available in Designer
- ➔ New Active Reports features
  - ○ Ability to set a dynamic column menu
  - ○ Auto-select filter values
- ➔ Support for Simple and Static Parameters
- ➔ Ability to add a border to a Report
- ➔ Enhanced and Refined the ability to set a Reference line in a chart

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Let’s build a report!

- ➔ Start something new > Create Visualizations > retail_samples > wf_retail_lite.mas
- ➔ From the Content picker > select, Standard Report
- ➔ Change the Output Format to AHTML
- ➔ Add a couple of dimensions and measures
- ➔ Let’s explore the AHTML options that are now available in Designer
  - ○ Navigate to the Format tab
  - ○ Expand the ‘General’ dropdown and select, Output Settings
  - ○ Scroll down to, AHTML Features
- ➔ New features for Active
  - ○ Dynamic column menu
  - ○ Auto-select filter values
- ➔ Create a Simple or Static parameter
  - ○ Drag a field to the filter toolbar
  - ○ Right-click menu options > expand the Parameter Type flyout menu

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Report Borders & Reference Lines(for charts)

- ➔ Add borders to your current report
- ➔ Works with HTML and AHTML
- ➔ On the Format tab, expand the top dropdown > select, Columns
- ➔ Scroll down to Border Styling
- ➔ Explore and apply a border

- ➔ In the current report, click the 'Trash can' icon to clear the buckets
- ➔ Let's add Product Subcategory, Cost of Goods and MSRP
- ➔ Pick a chart type
- ➔ Navigate to the Format tab > Axis > select, Y Axis
- ➔ Expand, Reference Lines > click, Add reference line

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Q & A



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