



# Administering Db2 Web Query

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## Db2 Web Query Administration Console

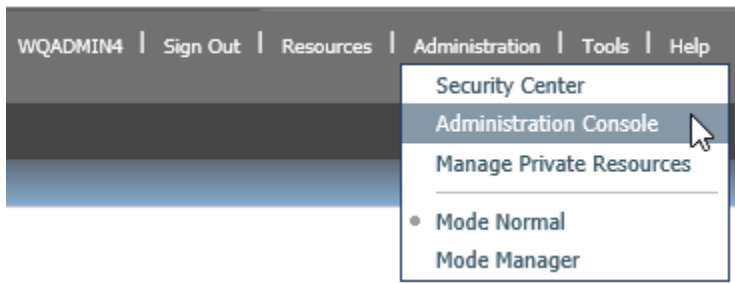
The Db2 Web Query Administration Console enables you to remotely manage your Db2 Web Query environment. Using the Console, administrators can navigate through and change various configuration settings for the Db2 Web Query Client.

### In this chapter:

- ❑ [Accessing the Db2 Web Query Administration Console](#)
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- ❑ [Changing Web Query Client Settings in Web Query](#)
- ❑ [Working With HTML5 Chart Extensions](#)

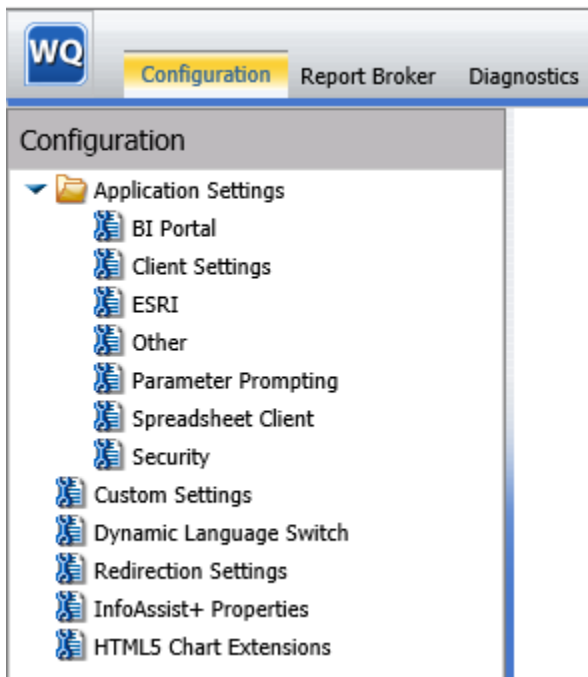
### Accessing the Db2 Web Query Administration Console

You can access the Administration Console from the Db2 Web Query menu bar by clicking *Administration* and then selecting the *Administration Console* option, as shown in the following image.



## Configuring Db2 Web Query

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



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

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

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

**Close.** Closes the Administration Console. You are still logged into Db2 Web Query as an administrator.

**Help.** Opens the online help file.

## Application Settings

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

### **Procedure:** How to View or Edit Application Settings

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

The settings appear in the main configuration pane.

2. Make the desired changes and click Save.

### **Reference:** BI Portal Settings

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

#### **Sign-in Message**

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

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

<|>, <br>, <b>, <u>, <a href>, </a>, <img>.

#### **Sign-in Page Links**

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

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

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

#### **Session Timeout**

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

## **Reference: Client Settings**

Client settings configure miscellaneous Client options.

### **Maximum Response Window Size**

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

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

### **Excel Server URL**

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

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

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

### **Graph Server URL**

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

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

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

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



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

### **Transin-Transout**

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

### **Plugin Class**

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

### **Reference: ESRI Settings**

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

### **ESRI On Premise**

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

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

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

For more information about how to configure Esri On Premise for InfoAssist+, see the *Configuring an Esri On Premise Environment* topic in the InfoAssist+ online Help.

## **Reference: Other Settings**

Other settings determine miscellaneous configuration settings.

### **Enable OLAP**

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

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

This check box is not selected, by default.

## **Reference: Parameter Prompting Settings**

Parameter Prompting settings determine parameter prompting behavior in Web Query.

### **Managed Reporting**

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

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

### **Managed Reporting when Prompt Parameters Property Unset**

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

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

## Self Service

Enables or disables amper auto prompting. Possible values are:

- Off.** Turns off auto prompting. This is the default value.
- Run with Default Values (XMLRUN).** Prompts for amper variables that were created with the `-DEFAULT` command and for any other amper variable that does not have a value.
- Always Prompt (XMLPROMPT).** Only prompts for amper variables that were created with the `-DEFAULT` command when there is another amper variable that does not have a value assigned and, therefore, will be prompted for.
- Display XML (Debug with syntax error checking) (XML).** Displays the XML document describing the amper variables in the browser. This setting is used internally, and is recommended for debugging and syntax error checking purposes only.
- Display XML (Debug) (XMLCHECK).** Displays the XML document describing the amper variables in the browser. This setting is used internally, and is recommended for debugging purposes only.

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

## Default Autoprompt Template

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

- Responsive.** Specifies the use of the responsive implementation and the `autoprompt_jqm.jsp` template. This is the default value.
- HTML\_Top.** Specifies the use of the HTML-based implementation and the `autoprompt_top.html` template, which displays parameters horizontally at the top of the page.
- HTML\_Top\_Checked.** Specifies the use of the HTML-based implementation and the `autoprompt_top_checked.html` template. In this template, the Run in a new window check box is selected, specifying that all reports open in a new window, by default.

## Null Behavior

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

### **Reference: Db2 Web Query Spreadsheet Client Settings**

The Spreadsheet Client settings determine how Spreadsheet Client performs authentication.

#### **Security**

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

#### **Form Only**

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

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

### **Reference: Security**

Security settings govern authentication for the Web Query environment.

#### **Enable Password Change**

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

#### **Sign-out URL**

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

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

## **Changing Web Query Client Settings in Web Query**

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

## **Understanding Custom Settings**

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

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

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

### **Procedure:** How to Configure Custom Settings

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

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

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

To help track changes to custom settings, use comments to identify and separate individual changes.

3. To store your custom settings in an encrypted format, select the *Encrypt* check box.

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

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

### Customizing the Dynamic Language Switch

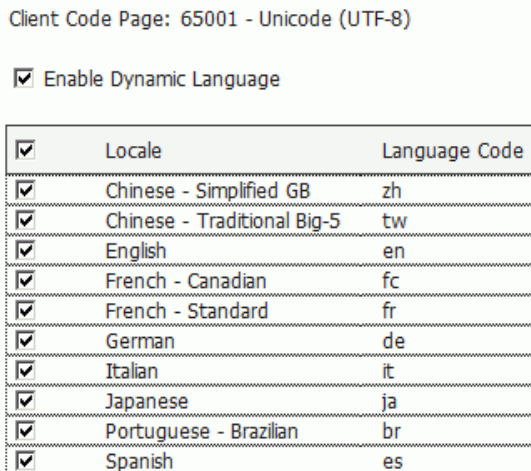
You can customize the languages that are made available on Sign in pages by activating the Dynamic Language Switch.

### **Procedure:** How to Customize the Dynamic Language Switch

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

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

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



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

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

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

## Understanding Redirection Settings

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

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

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

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

#### Redirection Settings

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

#### **Procedure:** How to Change Redirection Settings

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

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

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

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

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

- When you execute a `GRAPH` request, if you select the `Save` option when prompted to open or save the output, the output is saved to an `HTM` file using only a reference to the graph image, which will eventually expire and be deleted from the server (according to the temporary file expiration settings in the `Client Configuration`).
  - To preserve the output of the `GRAPH` request, open the saved `HTM` file, right-click the graph image, and select *Save Picture As* to save it to disk permanently. You can then substitute an absolute reference to the saved image file in the returned `HTM` output file.
4. If you want to encrypt the redirection settings, select the *Encrypt* check box at the bottom of the screen.
  5. Click `Save` to save your changes in the `Redirection Settings` panel.

### InfoAssist+ Properties

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

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



**Reference: Understanding InfoAssist+ Home Tab Properties**

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

**Use Live Preview Mode**

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

**Record Limit**

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

**Themes**

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

**Page Heading**

Enables the Header & Footer menu of the Home tab. InfoAssist+ users can use this menu to add a heading or footing to each page of the report output.

**Report Heading**

Enables the Header & Footer menu of the Home tab. InfoAssist+ users can use this menu to add a heading or footing to the first page of the report output.

**Reference: Understanding InfoAssist+ Format Tab Properties**

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

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

**Active PDF Format**

Enables the use of the active PDF report format. The active PDF format adds portability and interactive enhancements to active reports in PDF format.

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

### **Active Report Format**

Enables the use of the HTML active report format. An HTML active report is a self-contained report that is designed for offline analysis. It contains all of the data and JavaScript within the HTML output file and it includes analysis options, such as filtering, sorting, and charting.

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

### **Additional HTML Formats for Chart**

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

### **Additional PDF Formats for Chart**

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

### **Excel 2000 Format**

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

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

This check box is selected, by default.

### **Excel 2000 Formula**

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

This check box is selected, by default.

### **Excel 2007 Format**

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

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

This check box is selected, by default.

### **Excel 2007 Formula**

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

This check box is selected, by default.

### **Excel Pivot**

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

This check box is not selected, by default.

### **HTML Format**

Enables the use of the HTML page report format.

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

### **InfoMini Run Immediate**

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

### **Other Chart Types**

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

### **Pages on Demand**

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

### **PDF Format**

Enables the use of the PDF report format.

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

### **PowerPoint 2000 Format**

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

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

### **PowerPoint 2007 Format**

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

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

### **Stack Measures**

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

### **User Selection**

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

### ***Reference:* Understanding InfoAssist+ View Tab Properties**

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

#### **Display View Tab**

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

#### **Data Panel**

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

## Query Panel

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

### **Reference:** Understanding InfoAssist+ Tool Options Dialog Defaults Properties

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

## Report Output Format

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

## Chart Output Format

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

## Document Output Format

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

### **Page Orientation**

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

### **Page Size**

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

### **Data Preview Method**

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

### **Record Limit**

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

### **Output Target**

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

### **InfoAssist+/Portal StyleSheet**

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

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

### **Visualization StyleSheet**

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

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

### **Encode HTML**

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

### **Enable Pages On Demand**

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

### **Rows retrieved from cache**

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

## ***Reference:* Understanding InfoAssist+ File Options**

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

### **Binary**

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

### **FOCUS**

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

### **Comma Delimited with Titles**

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

### **Plain Text**

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

### **Tab Delimited**

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

### **Tab Delimited with Titles**

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

### **Database Table**

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

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

### **Hyperstage**

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

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

### **SQL script**

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

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

### **XML**

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

### **JSON**

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



**Reference: Understanding InfoAssist+ Chart Type Options****Leaflet Maps**

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

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

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

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

**Reference: Understanding InfoAssist+ Auto Drill Properties**

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

**Single Click Navigate**

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

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

**Breadcrumbs**

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

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

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

### **Restore Original**

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

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

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

### **Drill Up**

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

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

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

### **Drill Down**

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

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

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

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

**Reference: Understanding InfoAssist+ Miscellaneous Options****Use two-part file name**

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

**Expand Data Source Tree**

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

**Join Tool**

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

**Layout Tab**

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

**Series Tab**





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

## Working With HTML5 Chart Extensions

The HTML5 Chart Extensions page contains all HTML5 chart extensions currently installed in your local installation of Web Query, as shown in the following image.

**HTML5 Chart Extensions**

[Get more Extensions](#)


 com.ibi.arc	<p>Name: Arc Chart Description: Arc Chart Version: 1.0 API Version: 1.0 Author: Three D Graphics Copyright: Three D Graphics Inc. URL: <a href="https://threedgraphics.com">https://threedgraphics.com</a> License:</p>	<input checked="" type="checkbox"/> Enabled <span style="color: red;">✕</span>
 com.ibi.chord	<p>Name: Chord Diagram Description: Chord Diagram Version: 1.0 API Version: 1.0 Author: Three D Graphics Copyright: Three D Graphics Inc. URL: <a href="https://github.com/ibi/vf-extensions-chart/tree/master/com.tdq.chord">https://github.com/ibi/vf-extensions-chart/tree/master/com.tdq.chord</a> License: BSD 3-clause</p>	<input type="checkbox"/> Enable <span style="color: red;">✕</span>
 com.ibi.liquid_gauge	<p>Name: Liquid Gauge Chart Description: Fancy animated gauge chart with a liquid interior Version: 1.0 API Version: 1.0 Author: Information Builders Copyright: Information Builders Inc. URL: <a href="https://github.com/ibi/vf-extensions-chart/tree/master/com.ibi.liquid_gauge">https://github.com/ibi/vf-extensions-chart/tree/master/com.ibi.liquid_gauge</a> License: BSD 3-clause</p>	<input checked="" type="checkbox"/> Enabled <span style="color: red;">✕</span>
 com.ibi.marker	<p>Name: Marker Chart Description: Simple Marker Chart Version: 1.0 API Version: 1.0 Author: Three D Graphics Copyright: Three D Graphics Inc. URL: <a href="https://threedgraphics.com">https://threedgraphics.com</a> License:</p>	<input type="checkbox"/> Enable <span style="color: red;">✕</span>

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

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

### Understanding HTML5 Chart Extension Entries

Each HTML5 Chart Extension entry contains details that identify a chart extension and its origin, and help you determine if a chart extension is appropriate for your installation of Web Query.

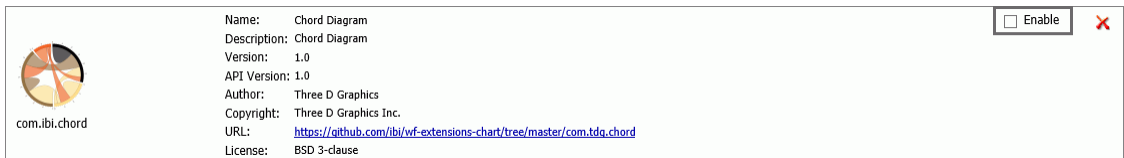
 com.ibi.chord	<p>Name: Chord Diagram Description: Chord Diagram Version: 1.0 API Version: 1.0 Author: Three D Graphics Copyright: Three D Graphics Inc. URL: <a href="https://github.com/ibi/vf-extensions-chart/tree/master/com.tdq.chord">https://github.com/ibi/vf-extensions-chart/tree/master/com.tdq.chord</a> License: BSD 3-clause</p>
--	--

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

## Understanding the HTML5 Chart Extensions Enable/Enabled Check Box

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

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



HTML5 Chart Extensions that have the Enable check box selected are installed, but they are not available to users in Web Query or InfoAssist+.

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

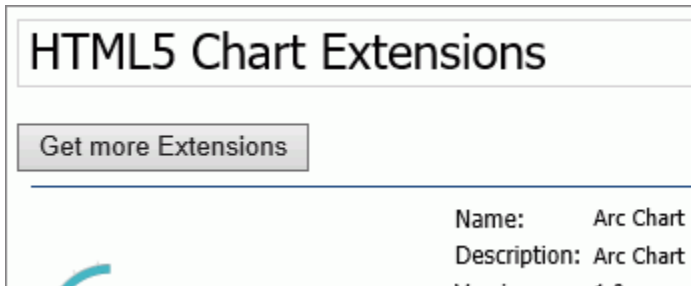


HTML5 Chart Extensions that have the Enabled check box selected are installed and are available to developers using InfoAssist+ for their use in chart creation. Web Query identifies the files and directories included in that Chart Extension as eligible for calls from InfoAssist+, and displays an icon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

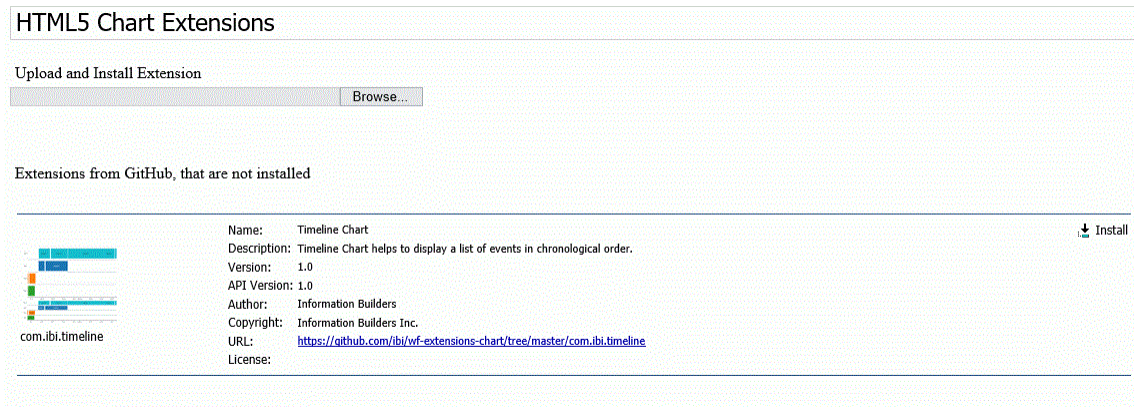
**Note:** The HTML5 Chart Extensions page does not manage copyright or license restrictions. You are ultimately responsible for the use of any HTML5 Chart Extension you upload. Therefore, you must ensure that you have a license or permission to use any HTML5 Chart Extension before uploading it to this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

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

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



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



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

- By clicking the *Install Extension* button  in entries for chart extensions that are found on the Information Builders public extension GitHub page, <https://github.com/ibi/wf-extensions-chart>, but are not currently installed in your installation of Web Query.

- ❑ By clicking the *Browse* button  next to Upload and Install Extension field to navigate to a folder on your local file system that contains a locally-developed HTML5 Chart Extension package in .zip file format.

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

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

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

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

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

The Open dialog box opens and points to the extensions folder for your local Web Query installation.

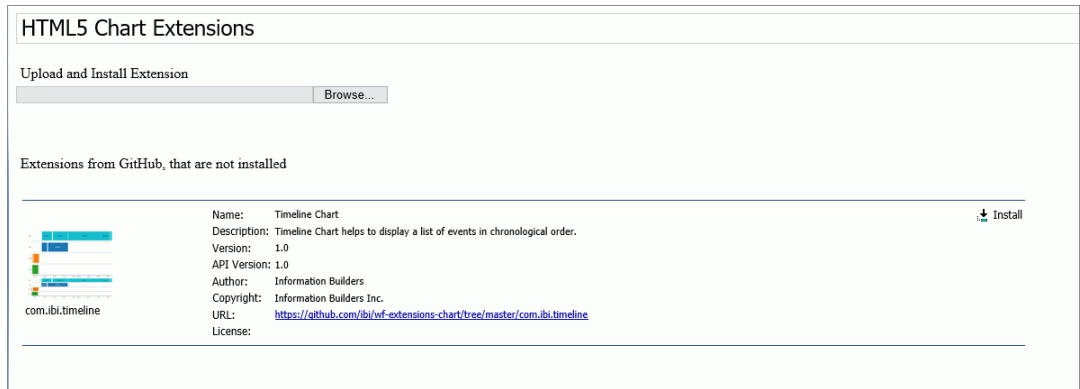
5. Click the file containing the zipped version of the HTML5 Chart extension you want to upload, and then click *Open*.
6. When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll down to the entry for the new HTML5 Chart Extension.


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

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

1. Sign in as an administrator and open the Administration Console.
2. On the Configuration tab, under the Application Settings folder, click *HTML5 Chart Extensions*.
3. On the HTML5 Chart Extensions page, click *Get more Extensions*.

- On the Upload and Install Extension page, review the list of extensions from GitHub that are not installed, as shown in the following image.



- If the chart extension you want to install appears in the list, click *Install Extension* .
- When the HTML5 Chart Extensions page refreshes and returns you to the top, scroll back to your entry to confirm that the chart extension is now installed.

### Procedure: How to Enable an Installed HTML5 Chart Extension

When you select the Enable check box in an HTML5 Chart Extension entry, you make it available for use in InfoAssist+ and in your local installation of Web Query. You must ensure that you have a license or permission to use any HTML5 Chart Extension before making it available for use.

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

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

- Select the *Enable* check box, as shown in the following image.



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



An icon for the HTML5 Chart Extension appears in the InfoAssist+ Select a Chart menu, which opens when you click the Other command in the Chart Types group on the Format tab.

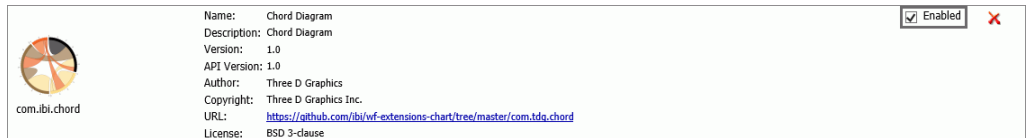
### **Procedure:** How to Disable an HTML5 Chart Extension

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

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

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

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



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

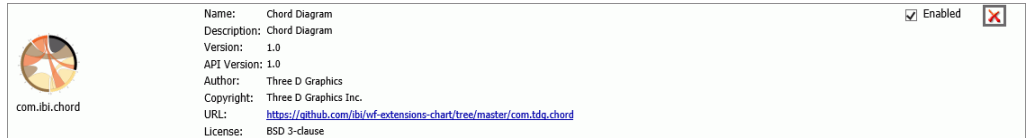
The icon for the HTML5 Chart Extension no longer appears in the in the Select a Chart Menu that opens from the InfoAssist+ ribbon.

### **Procedure:** How to Uninstall an HTML5 Chart Extension

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

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

- Click `Delete_CHARTNAME_Chart`, as shown in the following image.



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

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



# Chapter 2

## Db2 Web Query Change Management

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

There are features and methodologies within Db2 Web Query, which are used to facilitate these important tasks.

### **In this chapter:**

- ❑ [Understanding the Change Management Process](#)
  - ❑ [Creating a Change Management Package](#)
- 

### **Understanding the Change Management Process**

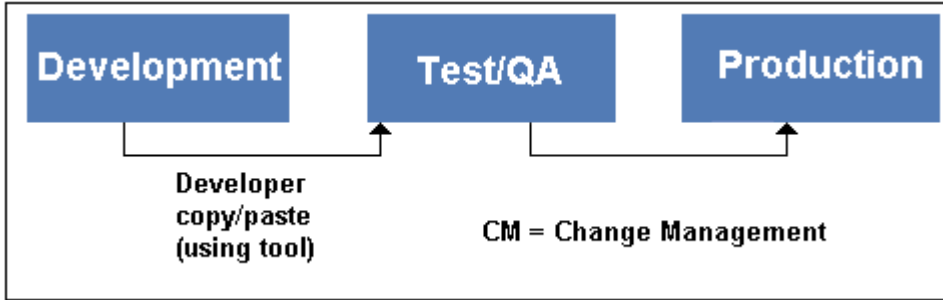
Developing an application is an iterative process. Developers revise application code and periodically move these components to the test environment for user feedback and acceptance. At some point within the application development lifecycle, when the application is stabilized, it is moved to production.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

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

The examples that follow illustrate two different change management processes. These sections describe product features and methodologies that can be utilized by companies to meet their change management objectives with DB2 Web Query.

**Example: Moving Application Files: A Simple Change Management Process**

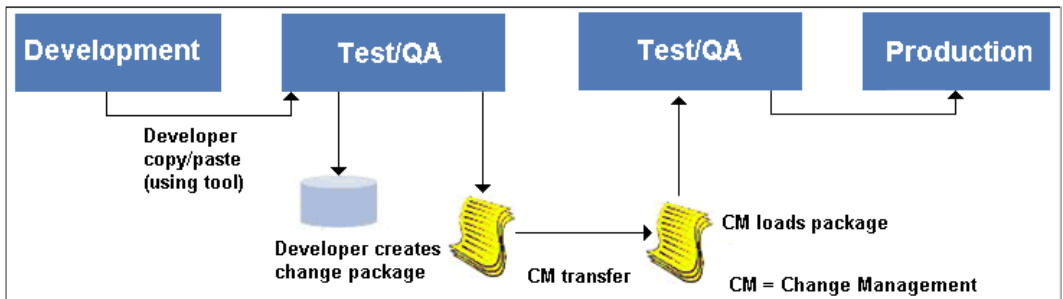
Developers move application files between the development and test environments using their development tool, as shown in the following image. When the application is finished, the application is copied from the test environment to the production environment, using operating system utilities. There may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



**Example: Moving Application Files: A Comprehensive Change Management Process**

In this example, four DB2 Web Query environments are established to increase the level of control of moving application code to production. Developers use the BI Portal Resources tree or Developer Workbench to move application files from the development environment to the test environment. Developers then use the Change Management Export facility when they are ready to move their changes to the user acceptance test environment.

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



## Creating a Change Management Package

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

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

### **Procedure:** How to Create a Change Management Extract Package

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

The steps required for creating a Change Management Package are:

1. **Creating a Scenario.** Using the Change Management Export user interface, create a Change Management scenario by selecting the resources to be exported. A scenario is a description of all the resources that will be exported into a Change Management Export Package.

2. **Exporting a Scenario.** After creating a scenario, export it into a Change Management Export Package. This Change Management Export Package is placed in the directory with the same name as the scenario:

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

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

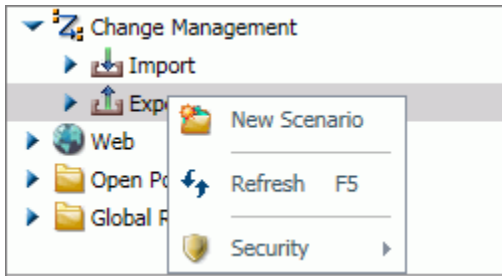
```
/qibm/userdata/qwebqry/base80/cm/import
```

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

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

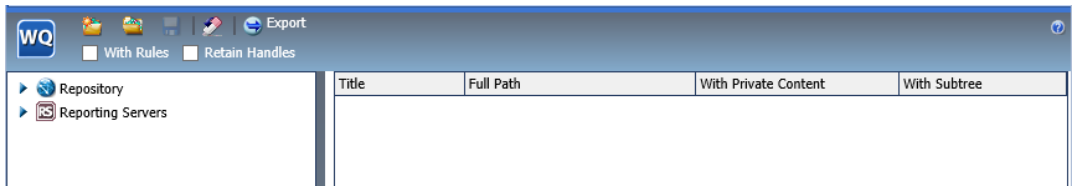
**Procedure: How to Access the Change Management Export Facility to Create a Scenario**

1. Right-click *Export* in the Change Management section, and select *New Scenario*, as shown in the following image.



2. In the New Scenario dialog box, type the Scenario name, and then click *OK*.

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



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

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

**Retain Handles.** This option is necessary when a release 2.1.x or 2.2.x source environment is migrated from a 1.1.x release of DB2 Web Query, and this content is used in a Change Management process. During migration from release 1.1.x to release 2.1.x or 2.2.x, the 1.1.x release hrefs are used as the 2.1.x or 2.2.x release handles to allow the earlier code for –INCLUDEs and drill downs to continue to work with the release 1.1.x style syntax. Moving these handles to the target environment, will allow code that contained the earlier style –INCLUDE and drill down syntax to continue to work.

The following types of resources can be moved:

- Any folder or item from the /WFC/Repository or what is shown in the user interface as DB2 Web Query, including procedures (FOCEXECs), Stylesheets, Images, HTML files, Schedules, and Distribution Lists.
- Any application or specific files from the Reporting Server node on the tree.

### Selecting Resources

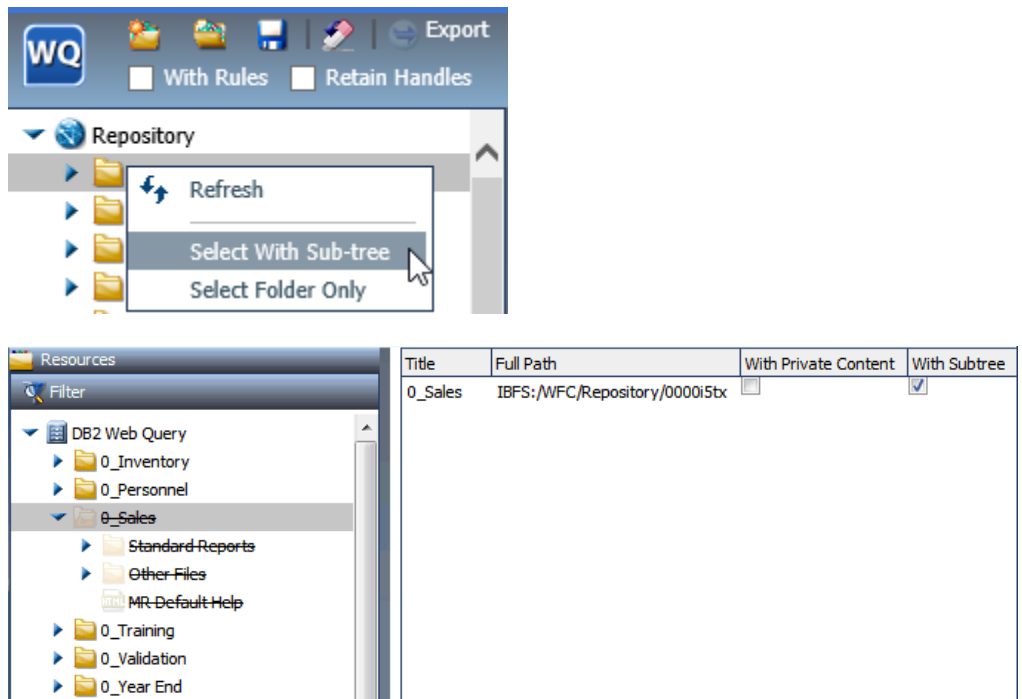
- Resources are selected by either dragging content from the Change Management tree on the left, to the right pane. Or, using the context menu and right-selecting the content you want to move, and choosing either *Select With Subtree* or *Select Folder Only*.
  - Select With Sub-tree* selects that folder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

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

- If you select a private resource, the *With Private Content* check box is automatically selected and cannot be cleared.
- If you select private content, it will only be imported if the owner of that private content already exists in the target environment.
- If you select a published folder, you can include private content within it by selecting the *With Private Content* check box for that resource. This selection exports all of the private content in that folder and its subfolders, including those *My Content* folders that are assigned to individual users, even if you do not have the privileges necessary to view that private content.
- If you select a subfolder without a parent folder, the Import process will recreate the parent folder in the target environment. A connection to the same metadata must exist within the target environment as well as the source environment.

- ❑ When selecting a collaborative portal and pages that reference external content, be sure to include that content in the change management package.
- ❑ If the rules on the source and target environments are different, users may have access to private content in the source environment, but be denied access in the target environment. This occurs if users have access to the published folder that contains the private content in the source environment, but do not have it in the target environment.

**Selecting a folder**



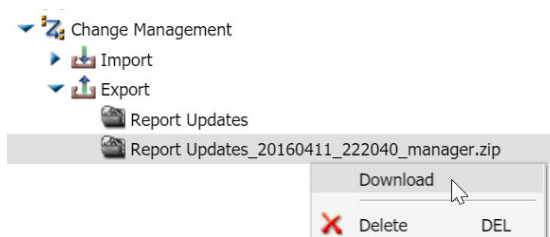
3. Now that resources are selected, the Scenario should be saved.  
Once saved, the Scenario can be run through the Change Management Import interface.



**Procedure: How to Download a Change Management Package Zip File**

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

1. In the Resources tree, expand the *Change Management* node.
2. Expand the *Export* node.
3. Right-click the CM zip file you want to download, and then click *Download*, as shown in the following image.

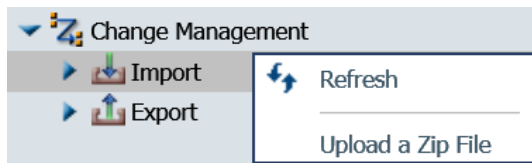


4. Save the CM zip file to an external location as directed by your browser.

**Procedure: How to Upload a Change Management Package Zip File**

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

1. In the Resources tree, expand the *Change Management* node, right-click *Import*, and then click *Upload a Zip File*, as shown in the following image.



2. In the Upload a Zip File dialog box, click *Browse*, navigate to the location where you have saved the change management package, click the CM zip file you want to upload, and then click *Open*.
3. Ensure that the correct CM zip file appears in the File to Upload field, and decide whether or not to import files from the package as published or unpublished files.
  - To establish the contents taken from the CM zip file as published after the upload is complete, select the *Publish Documents* check box. This is the default setting.

- To establish the contents taken from the CM zip file as private after the upload is complete, clear the *Publish Documents* check box.
- 4. Click *Upload*.  
A confirmation dialog box opens. Click *OK* to complete the upload.
- 5. In the Upload a Zip File dialog box, click *Close*.  
If an entry for the new CM zip file does not appear below the Import node, right-click it, and then click *Refresh*.

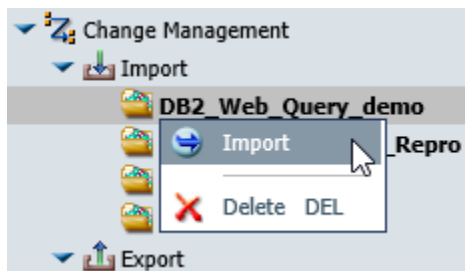
### **Procedure: How to Import a Change Management Package**

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

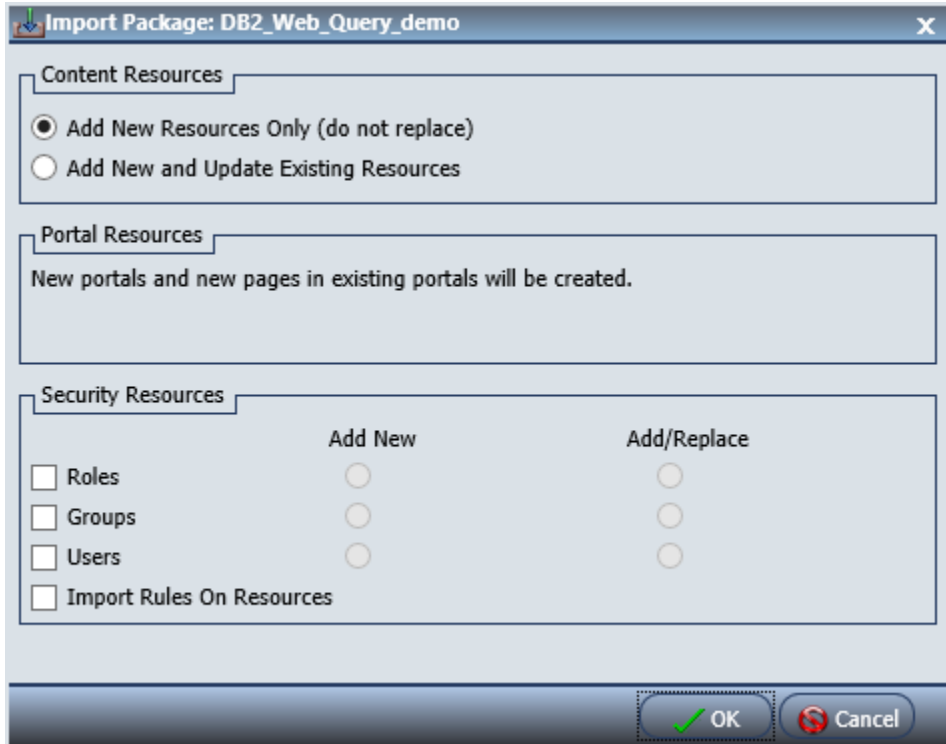
This step assumes that a Change Management Extract Package has been previously created and has been copied to the target environment in this directory:

</qibm/userdata/qwebqry/base80/cm/import>

1. The Change Management Export Package is selected from the Change Management Import folder, and the option of Import is selected, as shown in the following image.



2. A number of options are presented to the user, as shown in the following image.



### Content Resources

Options in this group define the scope of content resources included in the Change Management Import. Content resources include domains, portals, reports, charts, and other features, located under the nodes of the Resources tree.

**Add New Resource Only (do not replace).** This option limits the import to content resources in the Change Management package that do not already exist in the target environment. The import process assigns the date and time of the import to the Created On and Last Modified On fields of all new content resources created as a result of the import. To view the Created On and Last Modified On fields, right-click an item and click *Properties*.

Resources in the change management package that already exist in the target environment are not included in the import. As a result, the resources in the target environment are not affected by the import, and the import does not update the value assigned to the Last Modified On field.

**Add New and Update Existing Resources.** This option permits the import to add new resources to the target environment and update existing resources. The import process assigns the date and time of the import to the Created On and Last Modified On fields of all new content resources created as a result of the import. The import also assigns the date and time of the import to the Last Modified on field of all existing items updated by the import, but retains the original values in the Created On field.

### **Security Resources**

Options in this group specify the actions to take if the change management package includes the security resources Roles, Groups, or Users. A change management package includes a security resource if it is selected explicitly, or if the Selecting With Rules check box is selected for another type of resource.

**Roles.** Groups of user privileges. When included in a Change Management Import package, they add to or update the list of roles maintained in the repository and visible in the Security Center on the Roles tab.

**Groups.** Collections of users or subgroups that require similar capabilities or access to the same resources. When included in a change management Import package, they add to or update the list of existing groups maintained in the repository and visible in the Security Center on the Users & Groups tab.

**Users.** Those individuals who have access to Web Query. When included in a change management package, they add to or update the list of existing users maintained in the repository and visible in the Security Center on the Users & Groups tab.

For each of the Security resource categories, there are two options governing the scope of the import:

- Add New.** This option limits the import of security resources in the Change Management package to those that do not already exist in the target environment.
- Add/Replace.** This option permits the import to add new security resources to the target environment and update existing security resources.

**Import Rules On Resources.** This option specifies whether rules are imported from the current change management package, and is only relevant if the package contains exported rules.

As long as none of the security resource options are selected, the rules are imported using the components of the rules that exist in the target environment.

For example, if you select *Add New Resources Only (do not replace)* and *Import Rules On Resources*, the only rules that will be imported are the rules where all the components (groups, roles, and, if necessary, users) exist in the target environment.

If you select *Add New Resources Only (do not replace)* and *Import Rules On Resources*, and then select *Roles (Add New)*, the resources selected and the rules on those resources will be imported. In this case, the roles will be added only if they do not exist in the target environment and other components of the rules do exist in the target environment.



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