
INFOASSIST 2009 WORKSHOPS

HANDS-ON WORKSHOP FOR BUSINESS USERS 2009

CONFIGURATION AND SETUP INSTRUCTIONS

FILES NEEDED

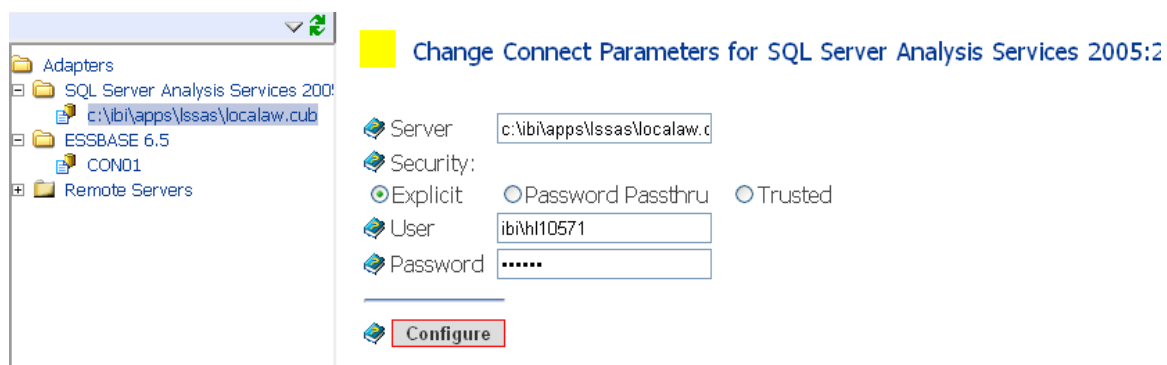
All required files can be found in the zip IA Workshop.zip

The zip contains 6 folders plus this setup document.

1. Scripts – The Workshop Manuals. They are:
 - a. One Tool for Business – A general workshop covering reports, charts, and documents.
 - b. Graphs Speak Louder Than Words – A graph specific workshop
2. Surveys – Surveys to be completed at the end of the workshop
3. wfadhoc – Master Files and custom Dashboard sign on page
4. ssas2005 – Installation files and instructions for the MS Analysis Services Local Cube
5. worp_wf769 – A Dashboard skin
6. Drill Down Reports – Contains the drill down reports for the General (One Tool for Business) and Graph (Graphs Speak Louder than Words) workshops

CONFIGURE THE DATA

1. Place the wfadhoc folder from the zip file at \ibi\apps
2. Create an ODBC data connection for the WFSTANDARD_DEMODB database
3. Create an Access data adapter for this source
4. Configure the LOCALAW database
 - a. Extract the ssas2005 folder
 - b. Run MSXML8msi
 - c. Run SQLServer3005_ASOLEDB9
 - d. If the ibi\apps directory is not located at c:\ibi\apps then modify localaw.acx in the wfadhoc directory to point to the proper location.
 - e. Add a SQL Server Analysis Services 2005 Adapter.
 - f. Set the Server to the location of the cube such as c:\ibi\apps\wfadhoc\localaw.cub
 - g. Set the credentials as follows
 - i. Userid: ibi\hl10571
 - ii. Pass: sleeps



Note: If you are unable to configure the access database a focus database named ia_workshop. Use this in place of wfstandard_demodb. It contains only the fields used in the workshop./

FIND OUT AHEAD OF TIME IF THE ENVIRONMENT IS 64-BIT

If the customer's environment is a 64-bit server it may not be possible to setup either the access database or MS Analysis Services local cube. If this happens you can use the focus database mentioned above. For the few steps using the cube, either stick with the focus database and create some charts or improvise with the customer's data.

SET UP MANAGED REPORTING

1. Create a new Domain
 - a. Name: wfadhoc
 - b. Check the "Application Path" checkbox
 - c. Add the wfadhoc application folder to the Selected Applications
 - d. Assign the application directory containing the data (wfadhoc)to this domain
 2. Create a new Group
 - a. Name: WF Business User Workshop
 - b. Domains: Add wfadhoc
 3. Create a new user
 - a. User id: wfadhoc
 - b. Name: WF Business User
 - c. Password: wfadhoc
 - d. Email Address: wfadhoc@127.0.0.1
 - e. Role: Analytical User
 - f. Privileges
 - i. Advanced
 - ii. Save Entered Values
 - iii. Share reports
 - iv. Schedule
 - v. Library Privileges
 - g. Group: WF Business User Workshop
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1. Extract the worp_wf769 folder from wfadhoc.zip into the \ibi\WebFOCUS76\worp\worp_html directory
 2. Create a Group View called "WF Business User Workshop" for the WF Business User Workshop Group.
 3. Change the look to use the view above.
 4. Change all of the Banner background colors and the hover color to #2377B6.

5. Change the composition
 - a. Uncheck use side banner and frame separator.
 - b. Change to use Domain tree only
6. Change Links and logos: Remove Accessibility and Tree (optional)
7. Uncheck to use the message of the day.
8. Edit the content and add at least one new page/tab called “Ad hoc Reporting”.
 - a. Add a tree block to the tab and call it My Reports.
9. Optionally add a tab for Deferred, Library, and Scheduling.
10. Reassign the content for the wfadhoc user to the newly created view called “WF Business User Workshop”
 - a. In View Builder, click Manage Users.
 - b. Check the checkbox next to wfadhoc.
 - c. Click Reassign
 - d. Choose the “WF Business User Workshop” view from the dropdown.
 - e. Check the box to “Replace User Content with View Content”
 - f. Click Submit

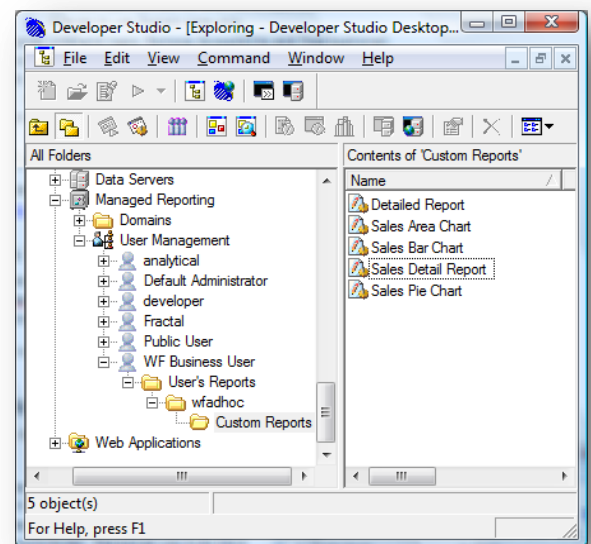
SET UP THE LOGIN PAGE

1. Create a shortcut on the desktop to make launching this page easier for the customer.
 - a. URL: <http://<server>:<port>/approot/wfadhoc/index.htm>
 - i. Server = Web Server Host Name
 - ii. Port = Web Server Port
 - b. Name the shortcut “WebFOCUS Login”

GENERAL WORKSHOP SETUP

1. Place “Sales Detail Report.fex” found in the Drill Down Reports folder of the wfadhoc.zip file into wfadhoc’s Custom Reports folder. The easiest way to do this is to copy and paste the file via Developer Studio.

The report is very basic and can easily be recreated in InfoAssist by looking at the source code or by look at the image on the following page



Sales Detail Report - WebFOCUS InfoAssist - Windows Internet Explorer

Home Insert Format Data Layout View **Field**

Filter Include Prompt Sort Break Style Format Specific Visibility Links

Interactive Design View

Detail Report for DVD Camcorders

Name	Model	Quota	Sales
DVD Easycam Camcorder - 3CCD	CDVD-300C	191,386,259	143,611,500
13 Inch Portable DVD Video System	DVD-100P	167,003,590	133,692,000
50 Inch HD A/V Wireless Plasma TV	TVP-50HD	83,071,227	76,860,100
EasyShot Digital Camera 6.1 Megapixel	DC-610	90,904,593	65,968,500
DVD Easycam Camcorder - 3CCD Pro	CDVD-300CP	68,640,943	53,642,500
Home Theater 5.1 System	HT-2000S	75,674,144	49,212,800
DVD Easycam Camcorder 14x Power Zoom	CDVD-140	52,771,581	47,052,850
15 Inch Portable DVD Video System	DVD-150P	52,221,876	39,186,000
DVD Recorder	DVD-100R	50,355,606	34,194,300
DVD Easycam Camcorder 16x Power Zoom	CDVD-160	35,039,424	29,232,000
DVD Changer / Player	DVD-100C	43,316,273	28,901,600
DVD Easycam Camcorder 18x Power Zoom	CDVD-180	31,538,430	26,834,500
EasyShot Digital Camera 8 Megapixel	DC-800	38,613,848	25,771,200
20 Inch LCD TV with PC/DVD/TV Inputs	TVL-20PDT	29,392,818	23,896,600
Digital CD Turntable	CD-500DT	29,666,958	21,221,000
56 Inch Widescreen HDTV Monitor TV with DLP	TVM-56DLP	23,068,584	20,064,000
MiniDV Easycam Camcorder - 3CCD	CDV-3000C	32,426,937	19,970,400
EasyShot Digital Camera	DC-100	23,263,652	18,285,840
Home Theater 7.1 THX System	HT-3000S	24,300,897	16,206,000
30 Inch LCD TV with PC/DVD/TV Inputs	TVL-30PDT	17,272,954	15,285,800
42 Inch Plasma Monitor/TV	TVP-42M	15,993,956	14,665,200
6.1 Channel Home Theater Receiver 100 WPC	HTR-610	19,434,467	14,200,550
EasyShot Ultra Zoom Digital Camera	DC-100UZ	18,849,927	14,030,690
DVD Player	DVD-100P	16,974,700	12,795,000
PreAmp/Tuner Two	PT-1500	24,364,174	12,206,500
6-Piece Home Theater Speaker System	SPH-600	40,863,984	11,265,760
MP3 Digital Audio Computer 4GB	MP-20G	14,653,989	11,135,250
EasyShot Wide Zoom Digital Camera	DC-100WZ	12,471,647	9,272,600
World Wide VHS VCR	VCR-100W	10,018,092	7,532,400
MP3 Player	MP-20	15,382,734	7,154,760
Home Theater Surround System	HT-1000S	8,884,107	6,669,750
Multichannel Super Audio CD Player	CD-50SA	9,559,218	6,216,600
Micro HiFi Stereo System	MS-H100	8,244,537	5,992,270

Done

Interactive

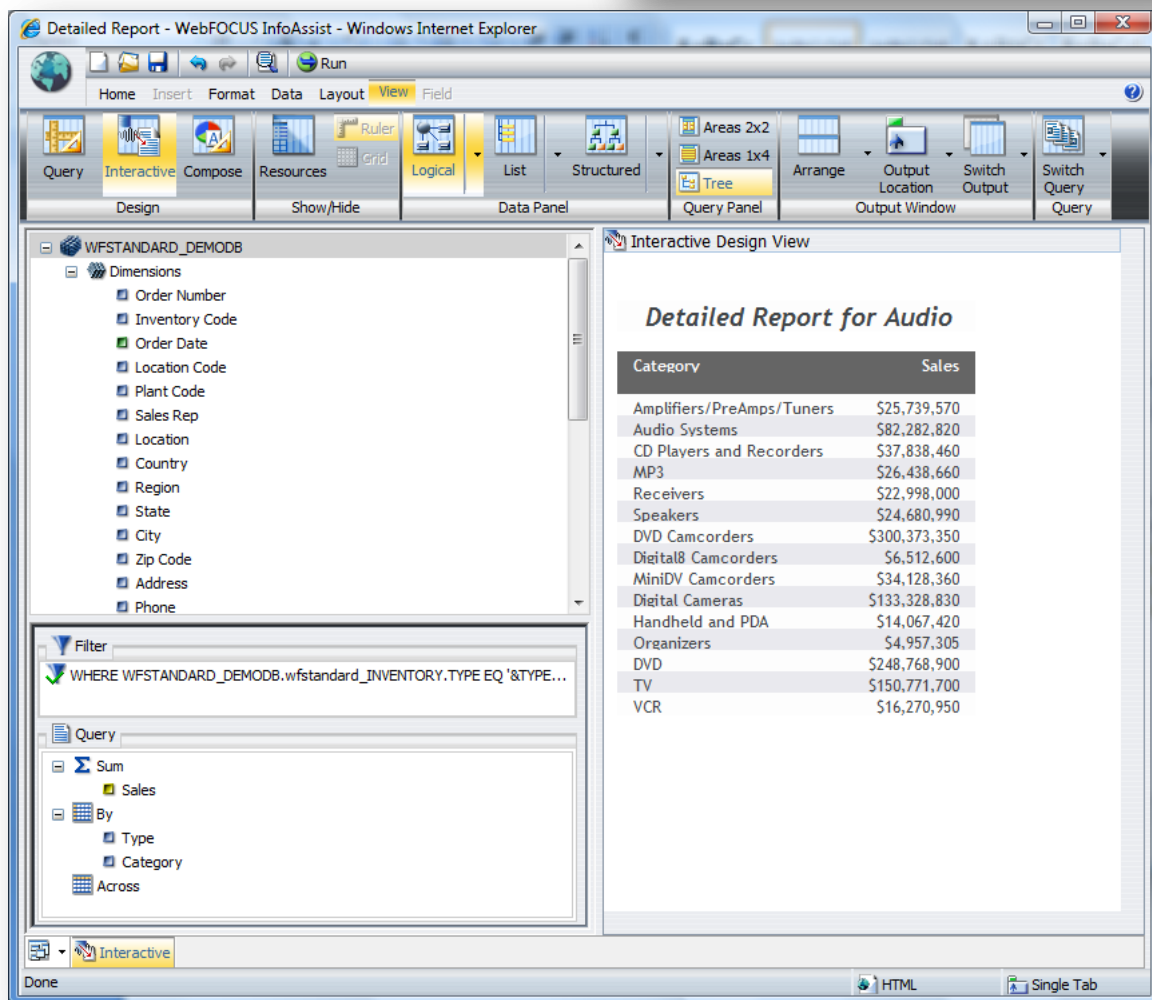
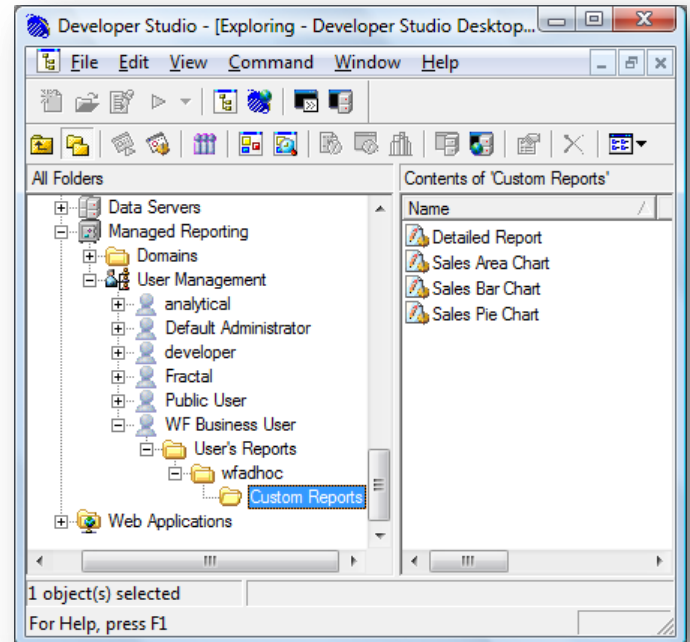
AHTML Single Tab

GRAPH WORKSHOP SETUP

The Graph Workshop requires a simple drill down report.

2. Place "Detailed Report.fex" found in the Drill Down Reports folder of the wfadhoc.zip file into wfadhoc's Custom Reports folder. The easiest way to do this is to copy and paste the file via Developer Studio.

The report is very basic and can easily be recreated in InfoAssist by looking at the source code or the following image.



SURVEYS

Please have the workshop participants complete the surveys. There are two surveys provided.

- a. General Survey – Use if teaching just One Tool for Business or both workshops.
- b. Chart Survey – Use if only giving Graphs Speak Louder Than Words

Completed surveys should be scanned and emailed to Brian Carter and Matthew Lerner.