Using the WebFOCUS Quick Data Add-in
Release 8.0 and higher

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Preface

This document describes the WebFOCUS Quick Data add-In developed for use with Microsoft Excel. It is intended for Quick Data Add-In Users, WebFOCUS Users, and WebFOCUS Administrators.

How This Manual Is Organized

This manual includes the following chapters:

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<td>Presents a general overview of the WebFOCUS Quick Data add-in along with installation and configuration instructions.</td>
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<td>2 Using the WebFOCUS Quick Data Add-in</td>
<td>Explains how to access WebFOCUS reporting tools through the Quick Data add-in, and describes the WebFOCUS drop-down menu in detail.</td>
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<td>3 Creating Reports and Using Ad Hoc Forms</td>
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Documentation Conventions

The following table describes the documentation conventions that are used in this manual.

<table>
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<th>Convention</th>
<th>Description</th>
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<tbody>
<tr>
<td>THIS TYPEFACE or this typeface</td>
<td>Denotes syntax that you must enter exactly as shown.</td>
</tr>
<tr>
<td>this typeface</td>
<td>Represents a placeholder (or variable) in syntax for a value that you or the system must supply.</td>
</tr>
</tbody>
</table>
Description

<table>
<thead>
<tr>
<th>Convention</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>underscore</td>
<td>Indicates a default setting.</td>
</tr>
<tr>
<td>this typeface</td>
<td>Represents a placeholder (or variable), a cross-reference, or an important term. It may also indicate a button, menu item, or dialog box option that you can click or select.</td>
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WebFOCUS Quick Data is a Microsoft® Office add-in that enables you to connect Microsoft Excel® directly to WebFOCUS reporting tools, where you can access and analyze all of your enterprise data. Connecting Excel to the WebFOCUS reporting engine allows WebFOCUS Quick Data to leverage over 300 adapters to provide you with access to a practically unlimited amount of enterprise information.

**In this chapter:**

- WebFOCUS Quick Data Add-In Overview
- WebFOCUS Quick Data Add-In Configuration and Installation

**WebFOCUS Quick Data Add-In Overview**

The WebFOCUS Quick Data add-in allows you to bring a large amount of enterprise information to the familiar Excel environment, and interact with this information without learning any additional software. You can install the WebFOCUS Quick Data add-in on your desktop, and you can create and edit queries by accessing predefined data sources. You can save a query in an Excel workbook, and you can refresh it at any time.

Because all WebFOCUS connection and report information can be saved in an Excel workbook, users with the proper security and access rights can share spreadsheets throughout an organization. As a result, you spend less time recreating reports and more time analyzing information for effective decision-making.

WebFOCUS Quick Data also enhances data privacy features in Excel, and better addresses compliance concerns. When you build reports directly in Excel, you can lock some or all of the cells containing report data and password protect the worksheet. By locking fields populated with WebFOCUS data, you can protect formulas while ensuring that the data is current.

When using WebFOCUS Quick Data in the familiar Excel environment, you can:

- Build reports that are automatically refreshed with updated data.
- Combine multiple reports from various data sources in a single worksheet.
- Burst data into multiple worksheets in the workbook.
- Automatically create named ranges.
Output computations and totals as native Excel formulas.

- Style output, add data filtering, and include drill-downs.
- Generate pivot tables.

To maximize its compatibility with your current environment, WebFOCUS Quick Data:

- Supports the 64-bit version of Excel 2010, and 2013.
- Supports SSO (Single Sign-On) Systems.
- Integrates with the new security system and report infrastructure that is available in WebFOCUS Release 8.
- Uses InfoAssist for reporting.
- Retrieves metadata based on the configuration of the Content/MR folder that is available to the user.
- Stores Structured Ad Hoc Forms (SAFs) in any content folder that is available to the user.

**WebFOCUS Quick Data Add-In Configuration and Installation**

This topic provides instructions for installing the Quick Data add-in, configuring the Quick Data add-in in WebFOCUS, and configuring a default WebFOCUS environment in which to use Quick Data.

**Installing and Setting Up WebFOCUS Quick Data**

You can install the WebFOCUS Quick Data add-in in one of the following ways:

- While installing a WebFOCUS desktop product, such as App Studio and Developer Studio. The full App Studio and Developer Studio editions include the Quick Data component, which can be installed and used with the App Studio or Developer Studio environment or with a WebFOCUS environment that is licensed for Quick Data.

- Manually distributing the Quick Data add-in file. If you have WebFOCUS with a licensed version of Quick Data, you can distribute the Quick Data add-in file to the machines that will use Quick Data. When using this installation method, you must also enable the Quick Data add-in from Excel.
If the Administrator has provided a WebFOCUS environment in which you can work, as defined in a configuration file, you can begin using Quick Data, as described in Using the WebFOCUS Quick Data Add-in on page 21. If a WebFOCUS environment is not yet set up for you, you must manually define the WebFOCUS connection parameters, as described in Manually Defining Web Server Connection Settings on page 25.

The following topics provide the installation procedures for both methods, and explain how to manually define the WebFOCUS connection parameters.

**Installing Quick Data With a WebFOCUS Desktop Product**

You can install the Quick Data add-in with a WebFOCUS desktop product, by selecting the WebFOCUS Quick Data check box in the WebFOCUS Developer Studio or App Studio Setup window, as shown in the following image.

![WebFOCUS App Studio Setup](image)

When you continue the WebFOCUS desktop product installation, your selection will automatically place the WebFOCUS Quick Data add-in in the proper location, where it can be detected and used by Excel.
Note:
- Enabling the WebFOCUS Quick Data option through a WebFOCUS desktop product provides a single-user license applicable only to this desktop product user. Quick Data interacts with the local desktop product environment or with a licensed WebFOCUS environment.
- You must separately license WebFOCUS Quick Data when it is used in multi-user WebFOCUS environments, and when a desktop product and WebFOCUS are installed on the same computer.

Distributing the Quick Data Add-In File
Whenever you need to install the Quick Data add-in without simultaneously installing a WebFOCUS desktop product, such as App Studio or Developer Studio, you can distribute the files that run the Quick Data add-in directly to those computers that will use it.

Procedure: How to Distribute the Quick Data Add-In File
1. Copy the wfquickdata.xla add-in file and the configuration file, wfquickdata.cfg, located in one of the following directories:
   - Windows environments
     Drive:\ibi\WebFOCUS8x\utilities\quickdata\directory
   - Unix environments
     usr/ibi/WebFOCUS8x/utilities/quickdata

2. Add the two files to the following directory on the machines that use Quick Data.

   C:\Users\userid\AppData\Roaming\Microsoft\AddIns

   where:
   
   userid
   
   Is the name of the user logged on to the PC.

After the WebFOCUS Quick Data add-in file is in the proper directory, you must open Excel and select the WebFOCUS Quick Data option in the Add-Ins dialog box, as described in the following procedure.
Procedure: How to Enable the Quick Data Add-In in Excel 2013

Use the following steps to enable the Quick Data add-in in Excel 2013.

1. Launch Microsoft Excel 2013.
2. Click the File tab, click Options, and then click Open.
3. From the Excel Options dialog box, click Add-Ins.
4. From the Manage list on the Manage Add-Ins page, click Excel Add-ins, and then click Go.

The Add-Ins dialog box opens, with WebFOCUS Quick Data as an add-in option, as shown in the following image.

![Add-Ins dialog box with WebFOCUS Quick Data selected](image)

5. Select the WebFOCUS Quick Data check box and click OK.

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

Note:

- If WebFOCUS Quick Data is not listed in the Add-Ins dialog box, ensure that the add-in file is installed and placed in the correct directory.
- If the Quick Data add-in was installed in a different directory, use the Browse button in the Add-Ins dialog box to locate it.
6. Click the Add-Ins tab to view the new WebFOCUS menu, as shown in the following image.

**Procedure: How to Enable the Quick Data Add-In in Excel 2010**

Use the following steps to enable the Quick Data add-in in Excel 2010.

2. Click the File tab, click Options, and then click the Add-Ins category.
3. In the Manage dialog box, click Excel Add-ins, and then click Go.

The Add-Ins dialog box opens, with WebFOCUS Quick Data as an add-in option, as shown in the following image.
1. Introduction to the WebFOCUS Quick Data Add-In

**Note:**

- If WebFOCUS Quick Data is not listed in the Add-Ins dialog box, make sure that the add-in is installed and placed in the correct directory.
- If the Quick Data add-in was installed in a different directory, use the Browse button in the Add-Ins dialog box to locate it.

4. Select the *WebFOCUS Quick Data* check box, and then click *OK*.
   The dialog box closes, and the Add-Ins tab appears on the ribbon.

5. Click the *Add-Ins* tab to view the new WebFOCUS menu.

**Procedure: How to Enable the Quick Data Add-In in Excel 2007**

Use the following steps to enable the Quick Data add-in in Excel 2007.

2. Click the Microsoft Office Button .
3. In the Excel Options dialog box, click *Add-Ins*.
4. From the Manage drop-down list, click *Add-ins*, and then click Go.
The Add-Ins dialog box opens, with WebFOCUS Quick Data listed as an add-in option, as shown in the following image.

**Note:**

- If WebFOCUS Quick Data is not listed in the Add-Ins dialog box, make sure that the add-in is installed and placed in the correct directory.
- If the Quick Data add-in was installed in a different directory, use the Browse button in the Add-Ins dialog box to locate it.

5. Select *WebFOCUS Quick Data*, and click **OK**.

The dialog box closes, and the Add-Ins tab appears on the ribbon.
6. Click the Add-Ins tab to view the new WebFOCUS menu, as shown in the following image.

![WebFOCUS Add-Ins Menu](image)

**Configuring Quick Data in WebFOCUS**

By default, WebFOCUS Quick Data is configured to provide Reporting Server security, which enables you to create and edit reports using WebFOCUS InfoAssist.

Optionally:

- You can configure WebFOCUS Quick Data in the WebFOCUS Administration Console to enable MR Authorization, which provides secure access to data through the WebFOCUS environment.
- You can configure a setting in the WebFOCUS Administration Console to provide the ability to create queries by accessing Structured Ad Hoc Forms (SAFs) stored in Managed Reporting content. An SAF is an HTML form containing a report procedure that is already connected to a data source. It enables you to select from a series of parameters to build a data set for analysis in Excel.

**Procedure: How to Configure Quick Data in WebFOCUS**

1. Launch WebFOCUS.
2. On the Menu bar, click Administration, and then click Administration Console.
3. In the left pane, expand the Configuration section, expand Application Settings, and then click Quickdata.

   The Application Settings - Quickdata panel opens, as shown in the following image.

4. In the IBI_Quick_Data_Security parameter value field:
Keep the value WFRS, displayed by default, to implement the Quick Data add-in with standard-level Reporting Server security.

Under this setting, the Quick Data add-in presents users with a list of metadata determined by the server configuration and the access limitations in their user or server profiles.

Delete the WFRS value and type MR to upgrade to Managed Reporting level security.

Under this setting, the Quick Data add-in presents users with an authorized list of Master Files, and the metadata they contain, which is based on the application path set in the properties of a repository folder.

5. In the IBI_Quick_Data_Form_Only parameter value field:
   a. Keep the default value of No to allow users unlimited access to InfoAssist for report creation.
   b. Select the value Yes to limit users to the use of structured ad hoc forms (SAFs) for all reports.

6. Click Save to save your configuration settings.

**Configuring Permissions for the Anonymous User**

If Quick Data is configured to use WebFOCUS Reporting Server (WFRS) authentication and the Public anonymous user is enabled, you must configure permissions for the Anonymous user, to grant access to the list of Reporting Servers.

**Procedure: How to Configure Permissions for the Anonymous User**

1. Sign in to WebFOCUS as an administrator.
2. In the Resource tree, right-click the Content node, point to View, and then click Full View.
   The Resource tree now shows the available WebFOCUS subsystems.
3. Right-click the EDA folder, point to Security, and then click Rules.
   The Security Rules - EDA dialog box opens.
4. Clear the Only show Groups with Rules check box.
   The Anonymous user group now becomes visible.
5. Click the Anonymous group.
6. In the bottom pane, click the ListAndRun rule.
7. In the Access column, change Not Set to Permitted, as shown in the following image.

8. Click Apply, and then click OK.

9. In the Resource tree, right-click the WebFOCUS node, point to View, and then click Repository View.

10. The Resource tree changes to the default state.

**Configuring a Default WebFOCUS Environment**

A configuration file is provided with the Quick Data add-in for the Administrator to use as a template when designing a default WebFOCUS environment. The configuration file defines items such as the WebFOCUS web server port number, alias, and client path.

Providing users with a default WebFOCUS environment allows them to bypass the additional step of manually defining these parameters in order to use Quick Data, as described in *Manually Defining Web Server Connection Settings* on page 25.

The configuration file is named wfquickdata.cfg. It is located in the directory:

`...\webfocus81\utilities\quickdata\`
The configuration file can contain multiple WebFOCUS configurations. Keep in mind that if the configuration file contains more than one WebFOCUS configuration, the last one appearing in the file is the configuration that is used when Quick Data is opened.

The configuration file provided as a template with the Quick Data add-in contains examples of configurations and instructions to help you create your own configuration. The following example displays a typical WebFOCUS configuration:

```
SERVER_START
  PROTOCOL="http"
  HOST="localhost"
  PORT="8080"
  HTML_ALIAS="/ibi_apps/ibi_html"
  CLIENT_PATH="/ibi_apps/WFServlet.ibfs"
SERVER_END
```

**Note:**

- The use of double quotation marks around a parameter value, as shown in the example, is optional.
- Begin a comment line in the file with a number sign (#).

Use the following guidelines to create the configuration file:

- The configuration file must have the same name as the Quick Data add-in file, and must have the extension .cfg, such as wfquickdata.cfg.
- The configuration file must reside on the machine running the Quick Data add-in, in the same directory as the .xla file.
- Each WebFOCUS configuration must be begin with the delimiter, SERVER_START, and end with the delimiter, SERVER_END.
- Each configuration must contain the following parameters in order to connect to WebFOCUS:
  - **PROTOCOL.** The protocol used in the environment running WebFOCUS. If WebFOCUS is running in a Secure Sockets Layer (SSL) environment, you must specify https as the protocol value. The default value is http.
  - **HOST.** The name of the server on which the WebFOCUS web application is installed.
  - **PORT.** The port number of the application server on which WebFOCUS is installed.
- **HTML_ALIAS.** The alias of the web server or application server on which the WebFOCUS static pages are located. The default value is:
  
  `/ibi_apps/ibi_html`

  **Note:** The leading slash is required.

- **CLIENT_PATH.** The path to the WebFOCUS Servlet, as defined in the WebFOCUS web application file, web.xml. The default value is:
  
  `/ibi_apps/WFServlet.ibfs`

  where:

  `/ibi_apps`
  
  Is the context root of the WebFOCUS web application. The leading slash is required.
  You can configure this value.

  `WFServlet.ibfs`
  
  Is the name of the WebFOCUS Servlet.
Once WebFOCUS Quick Data is installed and configured, you can begin using it from Excel, as described in this topic.

In this chapter:

- Accessing the WebFOCUS Quick Data Add-in in Excel
- WebFOCUS Quick Data Options
- Manually Defining Web Server Connection Settings

Accessing the WebFOCUS Quick Data Add-in in Excel

In Excel 2013, the Add-ins tab is displayed on the ribbon. The Add-ins tab contains all Add-in menu commands, including the WebFOCUS Add-in menu, as shown in the following image.

When you use WebFOCUS Quick Data, if your environment is not properly licensed, the message shown in the following image is displayed.

Contact your administrator to help you resolve this error.

If WebFOCUS Quick Data is configured to use MR Authentication, you are prompted to sign in with valid WebFOCUS credentials.
If the Reporting Server requires explicit sign-on, you will be prompted to sign in with valid Reporting Server credentials, as shown in the following image.

![Reporting Server Logon](image)

**Tip:** By default, you are only prompted for valid credentials the first time that you create or edit a query. These credentials are reused throughout the active Excel session.

### WebFOCUS Quick Data Options

This topic describes the options on the WebFOCUS Add-in menu. Except for Settings, these options are also available from shortcut menus in Excel.

- **Create Query.** Opens the Web Server Connection dialog box to enable you to connect to WebFOCUS. It continues by opening the Data Source Selection dialog box to enable you to select a Master File. It then opens the WebFOCUS InfoAssist tool, where you can create a query. This option is available for new queries only.

- **Edit Query.** Opens the WebFOCUS InfoAssist tool, where you can edit a query. This option is available for existing queries only.
  
  Edit Query is not enabled for password-protected cells.

- **Edit Connection.** Opens the Web Server Connection dialog box, where you can edit the connection settings including the Web Server URL, the HTML Alias, and the Client Path. The ability to edit connection information saves time when you are reusing reports and helps facilitate the sharing of workbooks across an organization. This option is available for existing queries only.

- **Data Range Properties.** Opens the External Data Range Properties dialog box, where you can set Excel query properties. For more information, see [Setting Query Properties](#) on page 81. This option is available for existing queries only.

- **Refresh Data.** Refreshes the data in the existing report query. This option is available for existing queries only.
  
  Refresh is not enabled for password-protected cells.
Settings. Opens the WebFOCUS Quick Data Settings dialog box, as shown in the following image.

The WebFOCUS Quick Data Settings dialog box provides access to the following settings:

- **On-Demand Reporting Server Logon.** When this check box is selected, a user will be prompted to log on to the Reporting Server the first time that a connection to the server is made during an Excel session. When this check box is clear, a user will be prompted to log on each time that a request is made to the Reporting Server during an Excel session.

- **Show Properties dialog when the query is created.** When this check box is selected, the Properties dialog box opens every time you execute a new query. This dialog box enables you to direct the Quick Data add-in to overwrite or protect existing data in your spreadsheet before transferring new report data.

- **Enable Tracing.** When this check box is selected, you can capture WebFOCUS Quick Data information in a trace file to troubleshoot communication problems and issues that may occur when you attempt to create and run report requests.
The captured information includes tasks performed by the tool when it attempts to connect to the web server and Reporting Server, when requests are made for data, and when data is retrieved. The default name of the trace file is wfquickdata.txt. It is created in the same directory as the WebFOCUS Quick Data Add-in file, for example:

C:\Users\user_id\AppData\Roaming\Microsoft\Addins\

Traces are captured for the duration of a single active Excel session. Tracing is automatically turned off when you close an Excel session. The trace file content is cumulative, meaning that trace information will be added to the file from each session in which tracing is enabled.

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

To view the current trace file, click Open Trace.

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

You can forward your trace file to Information Builders Customer Support Services (CSS) for analysis by the technical support team.

- **Web Servers List.** Opens a dialog box that displays a list of configured web servers, as shown in the following image. You can move the servers up or down in the list to change the order of their appearance, and delete servers from the list.
Manually Defining Web Server Connection Settings

You must manually define web server connection settings if:

- The Administrator has not provided a configuration file defining these connection settings. For details on the configuration file, see Configuring a Default WebFOCUS Environment on page 17.
- You want to add a new WebFOCUS environment to the existing available environments.

Procedure: How to Manually Define Web Server Connection Settings

To manually define web server connection settings for WebFOCUS Quick Data:

1. Launch Excel.
2. On the Add-Ins tab in the Menu Commands group, click WebFOCUS, and then click Create Query.

   The Web Server Connection dialog box opens, as shown in the following image.

   ![Web Server Connection Dialog Box](image)

   **Note:** The Web Server URL must not end with a slash mark (/).

3. In the Web Server URL field, type the URL for the server on which WebFOCUS is installed. The URL includes the protocol (http: or https:), the server name (for example, localhost), and the server port number (for example, 8080).

   **Tip:** When you enter a web server URL correctly, the next time that you use WebFOCUS Quick Data, that server will be displayed in the Web Server URL field, or it will be a selection in the drop-down list.
4. To provide a custom alias, click Advanced. The Advanced Connection Options dialog box opens, as shown in the following image.

![Advanced Connection Options dialog box](image)

If your WebFOCUS environment has been customized, you can configure the following attributes in the Advanced Connection Options dialog box:

- **HTML Alias.** Specifies the alias, defined on the web server, for the ibi_html directory. If your WebFOCUS environment does not use the default /ibi_apps/ibi_html alias, specify the custom alias defined on the remote web server.

- **Client Path.** Specifies how calls are made to the web server. Your WebFOCUS environment uses the WebFOCUS Servlet with the ibi_apps context path. As a result, the client path is set to /ibi_apps/WFServlet.ibfs by default.

**Note:** The following connections are supported:

- Anonymous web servers.
- HTTP and HTTPS.
- Reporting Servers with and without security.
- Context paths other than the standard /ibi_html and /ibi_apps context paths.

You can specify a non-standard context path in the Advanced Connection Options dialog box.

5. In the Advanced Connection Options dialog box, click OK.

6. In the Web Server Connection dialog box, click Next to establish a connection to the web server and to start creating reports.

**Procedure:** How to Activate Managed Reporting Authorization for Quick Data

1. Launch WebFOCUS.
2. In the IBI Portal Welcome Page Menu bar, click Administration, and then click Administration Console.

3. In the left pane, expand the Configuration section, expand Application Settings, and then click Quickdata.

   The Application Settings - Quickdata panel opens, as shown in the following image.

   ![Application Settings - Quickdata Panel](image)

4. Type MR in the IBI_Quick_Data_Security parameter.

5. Keep the default value of NO for the IBI_Quick_Data_Form_Only parameter.

   **Note:** If you set the IBI_Quick_Data_Form_Only parameter to Yes, users will be limited to creating reports from structured ad hoc forms (SAFs), and will be unable to create reports directly from InfoAssist queries.

6. Click Save to save your configuration settings.

7. Clear your application server cache to remove any old configuration files from the memory cache, by clicking Clear Cache in the Main menu, as shown in the following image.

   ![Clear Cache](image)
Creating Reports and Using Ad Hoc Forms

You can use the Quick Data add-in to create reports from direct queries to your source data, or from structured ad hoc forms (SAFs), which are pre-configured report queries that enable you to display different subsets of their information by selecting different parameter values. Therefore, if you are using Managed Reporting authentication, you will be prompted to perform one of two options after a successful login:

- Select a folder to determine which Master Files (synonyms) may be used to create a query with InfoAssist. You can then use the results from an InfoAssist query to populate your Excel worksheet.

- Select an existing structured ad hoc form to populate your Excel worksheet. The list of available folders and structured ad hoc forms is based on user privileges.

**Note:** You might be limited to reports created from structured ad hoc forms (SAFs), depending on your Quick Data configuration.

**In this chapter:**

- Selecting a Master File
- Creating Report Queries With InfoAssist
- Editing Report Queries in InfoAssist
- Creating Report Queries From Structured Ad Hoc Forms
Selecting a Master File

After you select a folder from the WebFOCUS repository, you are presented with a list of the available Master Files, in the Data Source Selection dialog box, as shown in the following image.

Scroll through the Data Source list, and click the Master File that you want to use. When you click Finish, WebFOCUS InfoAssist opens and loads the data fields associated with your selected Master File.

Note:
- You can select a Master File only when you are creating a new query with InfoAssist. The Data Source Selection dialog box is not available when editing an existing query or when using Structured Ad Hoc Forms.
- If you are using Repository Server authentication, the Master File dialog box is presented after a successful log on.

Creating Report Queries With InfoAssist

You can create a new report query directly from Excel by accessing the WebFOCUS Quick Data add-in. You can then specify the connection attributes and the data source for your query, and build your report using InfoAssist. You can place multiple queries in the same worksheet, or spread them out over multiple worksheets in a workbook.
There are limitations on the display of queries that overlap. However, there are data layout options available in the Query properties of Excel that can assist with overlapping queries. This behavior is governed by Excel, not the WebFOCUS Quick Data add-in.

**Procedure:** How to Create a New Report Query in InfoAssist

1. Open an Excel file, and select a cell that will be used as the starting point for your query results.
2. On the **Add Ins** tab, in the **Menu Commands** group, click **WebFOCUS**, and then click **Create Query**.
   You can also right-click any cell and click **Create WebFOCUS Query**.
3. In the **Web Server URL** field, type the URL for a web server in your reporting environment. You can also choose a web server from the drop-down list.
   The following image shows an example of the Web Server Connection page.

   ![Web Server Connection Page](image)

   **Note:** If the connection information was not specified during the creation of a previous query, you must supply the Web Server URL.

   For more information, see *Manually Defining Web Server Connection Settings* on page 25.

4. Click **Next**.
5. If this is your first query during your Excel session, or if your WebFOCUS Quick Data settings require you to sign in for each query, the **Sign in to WebFOCUS** dialog box opens.
a. If your WebFOCUS Quick Data add-in is configured to use MR Authentication, type your valid Managed Reporting credentials.

![Sign in to WebFOCUS](image)

b. If the Reporting Server requires explicit sign on, type valid Reporting Server credentials.

**Note:** If the On-Demand Reporting Server Logon option has been activated, you will not be prompted to sign in with valid WebFOCUS credentials after the first report query during an Excel session. If this option has not been activated, you will be prompted to sign in before every query. For more information, see *WebFOCUS Quick Data Options* on page 22.

6. Click **Sign In**.

7. When the Select a Folder page of the WebFOCUS Quick Data Wizard opens, select a folder or HTML File from the list of available data sources, and then click **Next**, as shown in the following image.
8. When the Data Source Selection page of the WebFOCUS Quick Data Wizard opens, click the Master File you want to use, and click Finish, as shown in the following image.

[Image of WebFOCUS Quick Data Wizard]

WebFOCUS InfoAssist opens, as shown in the following image.

[Image of WebFOCUS InfoAssist]

9. Use InfoAssist to build and run a query that returns output data to Excel.
Creating a New Report Query in InfoAssist

This example covers multiple aspects of creating a new report query using the WebFOCUS Quick Data tool from an Excel file.

1. Open an Excel file, and select a cell that will be used as the starting point for your query results.

2. On the Add-Ins tab, in the Menu Commands group, click WebFOCUS, and then click Create Query.

   The Web Server Connection page of the WebFOCUS Quick Data Wizard opens.

3. In the Web Server URL field, type the URL for a web server in your reporting environment, as shown in the following image. You can also choose a web server from the drop-down list.

   The following image shows an example of the Web Server Connection page.

![Web Server Connection Page](image)

**Note:** If you type the URL, do not end it with a slash mark (/). The Advanced Connection Option values that will be added to this URL automatically when creating the connection begin with a slash mark (/) already. Any slash mark (/) you enter here will be redundant and will prevent the connection from completing properly.

4. Click Next.

**Note:** If your configuration has been limited to the use of SAFs, select an HTML form inside a content folder that you have access to, and then click Next. Continue to create the report from a structured ad hoc form (SAF). For more information, see, *How to Create a Report Query from a Structured Ad Hoc Form* on page 56.
5. When the Select a Folder page of the WebFOCUS Quick Data Wizard opens, click a folder that contains the master file you need. When the list of Master Files accessible by the selected folder appears, click Next.

6. When the Data Source Selection page of the WebFOCUS Quick Data Wizard opens, click WF_RETAIL_LITE from the Data Source list, and then click Finish.

   **Note:** The WF_RETAIL_LITE data source is part of your Reporting Server setup.

WebFOCUS InfoAssist opens, as shown in the following image.

7. In the Query pane, click By.

8. In the Data pane Dimensions folder, expand Product, and Product, and then double-click Product,Category and Product,Subcategory.
InfoAssist assigns the Product,Category dimension to the By Query bucket in the Query pane, as shown in the following image.

InfoAssist assigns the three measures to the Sum Query bucket in the Query pane, as shown in the following image.

The Live Preview refreshes, and displays the column totals, as shown in the following image.

11. Click Save.

If you selected the *Show Properties dialog when the query is created* option in the WebFOCUS Quick Data Settings dialog box, the Properties dialog box opens, as shown in the following image.
This dialog box contains the following options:

- **Insert cells for new data.** Retains results from multiple queries in the same Excel worksheet. Depending on where new data is inserted, data from an earlier request may shift its location in the spreadsheet.

- **Overwrite existing cells with new data.** Overwrites existing data to replace results with those from the new request.

12. Click **Insert cells for new data**, and then click **OK**.

The report query data appears in the Excel file, as shown in the following image.

![Excel spreadsheet image](image)

**Note:** When you share an Excel file that was created using Quick Data, with another user, the user can view the saved data. To edit the request or refresh the data in the shared Excel file, the user must install the Quick Data add-in.

### Query Data Cell Ranges

In Excel, a range of cells is a group of two or more selected cells that share a name. You can use a named range of cells instead of a string of individual cell references when creating or updating formulas.
When the Quick Data add-in transfers the results of a report query to an Excel spreadsheet, it automatically creates a range that includes all of the cells covered by your query results, and separate, subordinate ranges, for each column in the results.

You can see the name of a range of cells in the Name box. On an Excel spreadsheet, the Name box appears below the ribbon, and next to the Formula bar. If an active cell is not part of a range, it displays the name (letter and number) of the active cell. If an active cell is part of a range, it displays the name of the range instead.

**Example: Working With Query Data Cell Ranges in Excel**

1. To see the range created by the report query results, click the drop-down arrow to the right of the Name box in the formula bar of an Excel spreadsheet that contains query results.

   The Name box drop-down list displays the named ranges that were automatically added to the spreadsheet when the Quick Data add-in transferred the query results to the Excel spreadsheet. The named range for the entire first data table is QDATA1, and the named ranges for individual columns appear below it, as shown in the following image.
2. Click QDATA1 on the Name box drop-down list. Excel automatically highlights the cells included in that range on the spreadsheet, as shown in the following image.

![Image of Excel spreadsheet with QDATA1 selected and range highlighted]

You can also use a range to protect or update the format assigned to all of the cells within that range in a single operation. The Data Range Properties dialog box contains the tools that enable you to protect or manage the format and other properties of a selected range.
3. To open the Data Range Properties dialog box, right-click any cell within the range and click *Data Range Properties*, as shown in the following image.

4. Modify options in the External Data Range Properties dialog box as needed, and save your changes.

   For more information, see *Setting Query Properties* on page 81.

5. When your review and configuration are complete, save the Excel file.

**Editing Report Queries in InfoAssist**

You can edit an existing Quick Data query from an Excel file worksheet. The Edit Query option automatically launches InfoAssist using the same connection attributes and data sources that were selected when the query was first created or last saved.

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

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

Procedure: How to Edit an Existing Report Query in InfoAssist

1. Open the Excel file that contains the existing query you want to update.
2. Right-click any cell in the existing query data range, and click Edit Query, as shown in the following image.

   ![Edit Query Image]

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

3. If the Excel file contains only one query, you can also use the WebFOCUS menu in the Add-Ins tab of the ribbon to select the Edit Query command.

   Selecting Edit Query launches InfoAssist, where you can edit the existing query.
Procedure: How to Update the Format of an Existing Report Query

After you have transferred the results of a report query to Excel, you can use InfoAssist to open and revise the format, scope, and arrangement of data in that query.

1. Open an existing Excel file, such as the file that you created in How to Create a New Report Query in InfoAssist on page 31.

2. Right-click any cell in the existing report query range, and click Edit Query.

InfoAssist opens, displaying the query, as shown in the following image.

3. To change the format of the Gross Profit measure, in the Query pane right-click Gross Profit, and click Edit Format, as shown in the following image.

4. In the Field Format Options for (Gross Profit) dialog box, edit the following options:
   a. Set the Field type to Decimal.
   b. Type 0 in the Decimals field.
c. In the Display options section, select the *Floating Currency (M)* and *Use Comma (C)* check boxes.

5. Click **OK**.

Your changes appear in the Gross Profit column of the report, as shown in the following image.

<table>
<thead>
<tr>
<th>Gross Profit</th>
</tr>
</thead>
<tbody>
<tr>
<td>$358</td>
</tr>
<tr>
<td>$1,395</td>
</tr>
<tr>
<td>$632</td>
</tr>
<tr>
<td>$1,987</td>
</tr>
<tr>
<td>$2,981</td>
</tr>
<tr>
<td>$1,882</td>
</tr>
<tr>
<td>$5,407</td>
</tr>
<tr>
<td>$1,149</td>
</tr>
<tr>
<td>$218</td>
</tr>
<tr>
<td>$3,326</td>
</tr>
<tr>
<td>$1,806</td>
</tr>
<tr>
<td>$1,351</td>
</tr>
<tr>
<td>$1,397</td>
</tr>
</tbody>
</table>

6. In the Query pane right-click *Cost of Goods*, and click **Edit Format**.

7. In the Query pane, under **By**, right-click *Product,Category*, and then click **Delete**, as shown in the following image.

8. In the Data pane, expand the *Product* and *Product* fields, if they have not already been expanded, and double-click *Model*. 
The Model data field moves to the By Query bucket in the Query pane automatically, and replaces the Product,Category data field you deleted in the previous step, as shown in the following image.

9. Click Save.
When you save the updated query in InfoAssist, Excel also refreshes, as shown in the following image.

**Procedure:** How to Preserve Report Data Formatting in Excel

Both WebFOCUS and Excel enable you to format data. When you choose to override existing data when editing a query, you run the risk of losing not only your original data but any additional formatting you applied to that data in Excel. You may therefore choose to preserve any formatting applied in Excel before editing a query.

1. Right-click any cell in the query range, and then click *Data Range Properties*.

   The External Data Range Properties dialog box opens.
2. Select the **Preserve cell formatting** check box in the Data formatting and layout area of the dialog box, and then click **OK**, as shown in the following image.

---

**Procedure:** **How to Use a Named Range in an Excel Formula**

By replacing numerous cell references with a range name, named cell ranges created by the Quick Data add-in help simplify the creation of any formula in Excel that analyzes query results. To demonstrate the value of named cell ranges, you can create a formula that counts the number of values in a named range, by performing the following steps.

1. Select any cell to the right of the existing query data.
2. On the **Home** tab, in the **Editing** group, click the **AutoSum (formula)** drop-down button.
3. Select **Count Numbers**, and start typing over the range of cells in the function text box with the named range for the Gross Profit column, which is QDATA1__WF_RETAIL_LITE.WF_RETAIL_SALES.GROSS_PROFIT_US. You can finish typing the whole range name or select it from the list box that appears when you start typing.
When you have typed or selected the range, this cell now contains the expression:

=COUNT(QDATA1_WF_RETAIL_LITE._WF_RETAIL_SALES.GROSS_PROFIT_US)

4. **Press Enter.**

Because there are 105 values in the Gross Profit column, the cell displays the number 105, as shown in the following image.

![Image of query data with COUNT formula](image)

**Note:** The COUNT formula appears in the function text box above the query data.

5. To edit the query again, right-click any cell in the query data range, and then click **Edit Query.**

InfoAssist opens, displaying the query.

**Procedure: How to Add a Filter to Query Results**

Filters enable you to limit very large complicated displays of query results to smaller, easier to understand, displays of query results grouped by categories in your database.

1. From the Data pane, expand **Dimensions, Product, and Product.**
2. Right-click *Product*,*Subcategory*, and click *Filter*, as shown in the following image.

3. In the Create a filtering condition dialog box, double-click *<Value>* in the statement:

   *Product*,*Subcategory* Equal to *<Value>*
The Values dialog box opens, as shown in the following image.

4. In the Values dialog box, click Get Values, and then click All.
The list of current values assigned to the Product,Subcategory field moves into the list box, as shown in the following image.

5. Select *Receivers*, and then click *Add values (>>)*.
The value Receivers moves into the Selected list box, as shown in the following image.

6. Click OK.
The Create a filtering condition dialog box closes, and the assigned value Receivers appears in the filtering statement, as shown in the following image.

7. Click OK.
A filtered view of the report results appears, as shown in the following image.

8. Click Save.

WebFOCUS returns the filtered data to the Excel file, as shown in the following image.
9. Save the Excel file with its filtered data, or open the query again to make further adjustments.

**Creating Report Queries From Structured Ad Hoc Forms**

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

To take advantage of this feature, you must first create one or more SAFs in a WebFOCUS desktop product, such as App Studio or Developer Studio.

**Note:** You must create these forms in the Content node of the Resource tree.

**Procedure: How to Create a Report Query from a Structured Ad Hoc Form**

1. Open an Excel file, and select a cell that will be used as the starting point for your query results.

2. On the Add-Ins tab, in the Menu Commands group, click WebFOCUS, and then click Create Query.

   **Note:** You can also right-click any cell, and then click Create WebFOCUS Query.

3. In the Web Server URL field, type the URL for a web server in your reporting environment. You can also choose a web server from the drop-down list.

   The following image shows an example of the Web Server Connection page.
Note: If the connection information was not specified during the creation of a previous query, you must supply the Web Server URL. For more information, see *Manually Defining Web Server Connection Settings* on page 25.

4. After you have supplied the connection settings, click Next.

5. If this is your first query during your Excel session, or if your WebFOCUS Quick Data settings require you to sign in for each query, the Sign in to WebFOCUS dialog box opens.

   a. If your WebFOCUS Quick Data add-in is configured to use MR Authentication, type your valid Managed Reporting credentials.

   ![Sign in to WebFOCUS dialog box](image)

   b. If the Reporting Server requires explicit sign on, type valid Reporting Server credentials.

   Note: If the On-Demand Reporting Server Logon option has been activated, you will not be prompted to sign in with valid WebFOCUS credentials after the first report query during an Excel session. If this option has not been activated, you will be prompted to sign in before every query. For more information, see *WebFOCUS Quick Data Options* on page 22.

6. Click Sign In.
7. When the Select a Folder page of the WebFOCUS Quick Data Wizard opens, open the folders to display the list of structured ad hoc forms, as shown in the following image.

**Note:** The list of folders and HTML forms in the display is based on user permissions.

8. Click the entry for the structured ad hoc form you want to use, and click Next, as shown in the following image.
The WebFOCUS HTML Form and the Properties dialog boxes open, as shown in the following image.

9. Keep the default option, *Insert cells for new data*, to retain any previously-entered query results, or click the alternative, *Overwrite existing cells with new data* to replace previously-entered query results.

10. Click *OK*.
Results from the first selection in the list of parameters load automatically into the spreadsheet, as shown in the following image.

11. To change the default selection, select a different parameter in the WebFOCUS HTML Form dialog box, as shown in the following image.

12. Click Run, as shown in the following image.
The report populates the Excel file with data assigned to your selected parameter, as shown in the following image.

![Excel Data Table]

**Note:** You can edit the query to select different parameter values, or rerun the same parameter values to refresh the data. To do so, close the WebFOCUS HTML Form, right-click any cell in the query, and then click *Edit Query.*
You can create structured ad hoc forms (SAFs) in a WebFOCUS desktop product, such as App Studio or Developer Studio, as described in this topic.

**In this chapter:**
- Creating Structured Ad Hoc Forms
- Setting Query Properties
- Defining Data Formatting and Layout

---

### Creating Structured Ad Hoc Forms

A structured ad hoc form (SAF) is a parameterized report that allows you to select fields and options that participate in a report at run time. Fields and options that have been added to the SAF are displayed in controls and are available for selection. Selecting fields from controls and running the report will display the data that correlates to the field values. You must add a parameter to a report to make it a valid SAF.

These procedures assume that you know how to create a parameterized report using HTML Canvas or HTML Composer. For more information on how to create a parameterized report refer to the App Studio Help or Developer Studio documentation.

**Procedure:** How to Create a Structured Ad Hoc Form Using App Studio

WebFOCUS App Studio enables you to create structured ad hoc forms using the HTML canvas.

2. In the Environments Tree panel, expand the environment that you are working with. In this example, we use localhost.
   
   If this is a new work session or if you are required to sign in on every attempt to access the server, the local host sign in dialog box opens. Enter the User ID and Password for the WebFOCUS server.

3. Expand content.
If this is a new work session or if you are required to sign in on every attempt to access the Reporting Server, the Reporting Server sign in dialog box opens. Enter the required User ID and Password.

The Environments Tree pane resembles the following image.

4. Right-click the Public folder, or any other folder you want to use, point to New, and then click HTML/Document, as shown in the following image.
5. When the first page of the HTML/Document Wizard opens, click Next to accept the default location for the HTML page, as shown in the following image.

![HTML / Document Wizard](image)

6. When the second page of the HTML/Document Wizard opens, keep the default background theme for the HTML/Document, or select an alternative from the Themes list, and then click Finish, as shown in the following image.

![Themes and Settings](image)
The wizard closes, and HTML canvas opens, as shown in the following image.

7. Right-click the HTML canvas and click *New Report*, as shown in the following image.
8. Draw a rectangle with the crosshair, right-click the report container, and then click *Import Existing Report*, as shown in the following image.
9. Select the name of the report to insert in the container, and then click OK, as shown in the following image.
Your report appears in the container on the HTML canvas, as shown in the following image.

For more information on how to create reports, see Creating Report Queries With InfoAssist on page 30.
10. Right-click the report, and then click Add a filter to create a parameter, as shown in the following image.

The Filter Options dialog box opens, as shown in the following image.
11. Select the value for the parameter and click **OK**, as shown in the following image.

The New Parameters dialog box opens, as shown in the following image.

12. In the Control Type column, click **Drop down list**.

13. Ensure that the **Create controls for all Parameters** check box is selected.

14. Click **OK**.
A dialog box for the new parameter appears above the report on the HTML canvas, as shown in the following image.

15. Save the updated HTML page by clicking the Application Menu button, and then clicking Save, or by clicking the Save icon on the Quick Access toolbar.

The Save As dialog box opens.
16. In the Save As dialog box, enter the name of the new report, now a structured ad hoc form, and click OK, as shown in the following image.

![Save As dialog box]

The name of the new report appears on the HTML canvas.

17. Right-click a report container on the HTML canvas and click Style.

The Style Composer dialog box opens.

18. In the left pane, click Layout.

19. In the Flow control section, under the Visibility drop-down list, click Hidden.
When your selections are complete, the Style Composer dialog box will resemble the following image.

![Style Composer dialog box image]

20. Click OK.

The frame is now hidden. You can make it visible by using the Visibility command, on the Utilities tab, in the Miscellaneous group, as shown in the following image.

![Utilities tab image]

**Note:** It is recommended to keep the frame hidden when running an HTML form in Excel through the Quick Data add-in, to avoid displaying a prompt with an empty frame alongside an active Excel workbook.

21. Save, and close the HTML page.
**Note:** If you want to use an existing procedure with the Quick Data add-in, you must set the format in the procedure to Excel.

**Procedure: How to Create a Structured Ad Hoc Form Using Developer Studio**

WebFOCUS Developer Studio enables you to create structured ad hoc forms using its HTML Composer pane.

1. Launch WebFOCUS Developer Studio.
2. From Developer Studio Explorer, expand the WebFOCUS Environments node, and expand the Content node.
3. Right-click the Public folder or any other folder you want to use, point to New, and then click HTML File.
4. When the Template Selector opens, keep the default background theme for the HTML/Document, or select an alternative from the Themes list, and then click Use Template, as shown in the following image.
The Select Template window closes, and the HTML Composer opens, as shown in the following image.

5. Right-click the report container, and then click **Import Existing Report**.

The Get Source file dialog box opens, as shown in the following image.

6. Select the name of the report source file to insert in the container, and then click **Open**.
Your report appears in the container on the HTML Composer, as shown in the following image.

7. Right-click the report, and then click Add a filter to create a parameter.

The Filter Options dialog box opens, as shown in the following image.
8. Select the value for the parameter and click OK, as shown in the following image.

The New Parameters dialog box opens, as shown in the following image.

9. In the Control Type column, ensure that Drop down list is displayed.

10. Ensure that the Create controls for all Parameters check box is selected.

11. Click OK.
A dialog box for the new parameter appears above the report on the HTML Composer, as shown in the following image.

12. Save the updated HTML document by clicking the **Save** icon on the Quick Access toolbar.
13. Click the report frame in HTML Composer.
14. In Properties sheet, click the **Display** drop-down list button, and then click the **Do Not Display** entry, as shown in the following image.
The Report Frame disappears, as shown in the following image.

15. Click Save.

Once you hide a frame, you can make it visible on the HTML Composer toolbar by clicking the Visibility toggle button, as shown in the following image.
Setting Query Properties

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

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

- **Name.** You can change the name that is automatically assigned to the named range.
  
  WebFOCUS Quick Data automatically adds a named range to the entire data table and also to each individual column. Named ranges are useful when referring to data as a source for analysis or within an advanced Excel application.

- **Query definition.** You can save the query definition and, if applicable, you can save the password.

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

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

- **Preserve cell formatting.** Affects the way in which data is returned to the worksheet when it is refreshed. If this check box is selected, the existing formatting in the worksheet is preserved. If this check box is clear, the existing formatting is removed when the query is refreshed. This check box is selected by default.

- **If the number of rows in the data range change upon refresh.** Determine how existing data is handled when new data is returned from a query. In some instances, the number of rows returned from the query may be more or less than the original data set. The following options determine what happens when this occurs.
  - Insert cells for new data, delete unused cells.
  - Insert entire rows for new data, clear unused cells.
  - Overwrite existing cells with new data, clear unused cells.

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